

OASIS Contact Centre

Tenant Administration Guide

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1 Tenant Overview

1.1 Overview

This chapter provides the following information:

- About This Guide
- Prerequisites
- Tenant Hierarchy
- Management Portal Overview
- Management Portal User Interface

1.2 About This Guide

This guide provides information and procedures for a Tenant of the OASIS Contact Centre Platform to administer the Management Portal application.

The Management Portal is the web-based system configuration tool for the OASIS Contact Centre Platform.

1.2.1 Intended audience

The information in this guide is intended for customer personnel involved in the configuration and administration of the OASIS tenants

1.2.2 Scope

This document provides an Overview of the administration entities relevant to tenants.

This document is intended to assist users unfamiliar with the basic tasks required to administer the system during operation.

The OASIS (11.5) Tenant Getting Started Guide (reference 4) provides a walk-through of configuring various entities within the Management Portal for a simple scenario. Multiple or advanced scenarios are not detailed.

1.2.3 Document structure

As per Table of Contents.

1.2.4 Conventions

The following conventions are used throughout VDI customer documentation:

Convention	Description
Special text elements distinguished by their fonts	
Keys	Keys, buttons, menu items, commands and other elements involving user interaction
Fields	Dialog titles, field names, options, labels, file names etc.
Code	Coding samples, file extracts and screen output
Variables	
Square brackets []	Optional value
Angle brackets <>	Generic placeholder to be replaced by your own specific value
Vertical bar	A choice of more than one value, one of which must be selected
Annotations	
	CAUTION - Important information warning you of possible problems
	Additional information or special note
	Helpful tip



Customer calls (a.k.a Contacts) are referred to as **calls** throughout this document. Where mentioned a call may be a voice telephony call, chat, social media or e-mail interaction with an agent.



The OASIS Contact Centre product is an ongoing development of new features and as such some screen shots and terminology may not be accurate at time of going to press,

1.2.4.1 Language conventions

Throughout this guide, the following language conventions are observed:

All terms related to persons are meant to be gender-neutral. For the sake of clarity, we usually use the masculine form.

1.2.5 Related documents

No.	Title	Reference
1	SmartStation Installation and Configuration Guide	[M12589]
2	SmartStation User Guide	[M12590]
3	OASIS (11.5) Media Bar User Guide	[S22472]
4	OASIS (11.5) Tenant Getting Started Guide	[S22105]
5	OASIS (11.5) MIS Reporting Guide	[S22328]
6	SmartStation Use Cases and Configuration	[M13174]

1.3 Prerequisites

You will need the following information to begin working with the Management Portal:

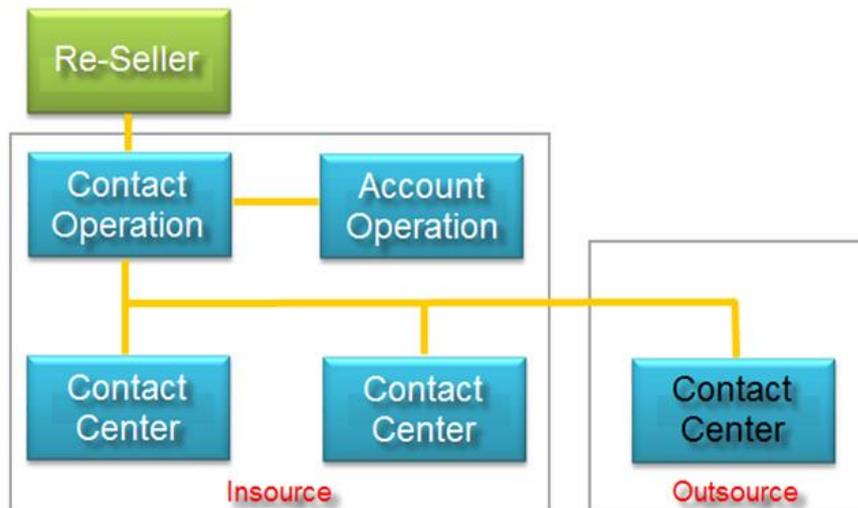
- URL for your system
- An administrator account on that system with appropriate permissions

1.4 Tenant Hierarchy

The tenant hierarchy consists of a Reseller Business Unit, which has one or more Contact Operation Business Units.

A Contact Operation can have one or more Contact Centre (insource) Business Units, Contact Centre (outsource) Business Units and Account Business Units. See Chapter 1.4.1 for additional details.

The Following figure illustrates a Business Unit Hierarchy Example



1.4.1 Business Units

Business Units represent Tenants. The following types of Business Unit are available:

Business Unit Type	Description
Reseller	<p>A top-level Business Unit representing the tenant overseeing the other types of Business Unit</p> <p>Resellers do not directly consume resources nor do they directly provide service. Rather, Resellers sell services to entities in underlying tiers.</p>
Contact Operation	<p>One or more Contact Operation tenants are under a Reseller, and they represent the tenant(s) overseeing the routing of calls. Contact Operations provide service and they can optionally operate Contact Centres.</p> <p>Within the context of this guide, a “tenant” is a Contact Operation.</p>

Business Unit Type	Description
Contact Centre	<p>If configured, one or more Contact Centres can exist under a Contact Operation.</p> <p>There are two different types of Contact Centres, as follows:</p> <ul style="list-style-type: none"> • Insource — The Contact Centre belongs to the same company as the Contact Operation. • Outsource — The Contact Centre does not belong to the same company as the Contact Operation. <p>There is no difference in the way Insource and Outsource Contact Centres are processed by the Management Portal.</p>
Account	<p>One or more Account tenants are under a Contact Operation, and they represent the tenant(s) where the Contact Operation is responsible for dealing with their calls.</p> <p>An Account tenant can be used to tag specific call traffic being handled by a Contact Operation. An Account tenant can then view historic (but not dynamic) reports for the calls being handled</p>

1.4.2 Contact Centres

In OASIS Contact Centres there are Business Units that represent those Tenants that deal with Agents and with the processing of calls. Contact Centres are logical (that is, not necessarily physical) call centres

1.4.3 Accounts

An Account represents a Tenant whose traffic is being managed by the Contact Operation. This Tenant can have specific reports shared and specific data shared for reporting purposes. Additionally, an Account can be assigned to a Classification. Accounts are associated with a Contact Operations Business Unit (not to a Contact Centre).

1.5 Management Portal Overview

The Management Portal provides a web-based environment for configuring entities within the Management Portal such as:

- Business Units (Tenants)
- Classifications

- Queues
- Announcements
- Routing Plans

The configuration data is then used by software running on various servers. Such software can include, for example:

- Call Distribution System (CDS)
Responsible for queueing, connecting, terminating and other call related activities.
- CSA Multi-Media Routing Service (CSA-MMR)
Executes Routing Plans.
- SmartStation or Media Bar
Provides computer telephony integration (CTI) services for user Agents at a workstation.
- Data File Servers (DFS)
Handles call announcements and storage for call recordings.

1.6 Management Portal User Interface

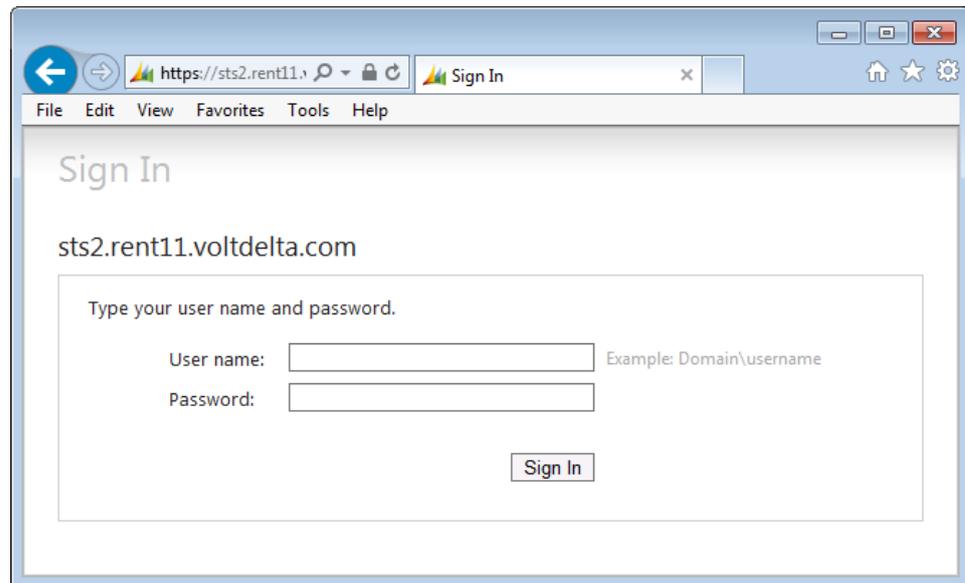
The Management Portal user interface is a customized implementation of the Microsoft Dynamics Customer Relationship Management (CRM) platform. Users who are familiar with Microsoft Dynamics might recognize some of the user interface features and functions, but the Management Portal has been tailored specifically for use with the OASIS Contact Centre environment.

1.6.1 Accessing the Management Portal

To access the Management Portal, do the following:

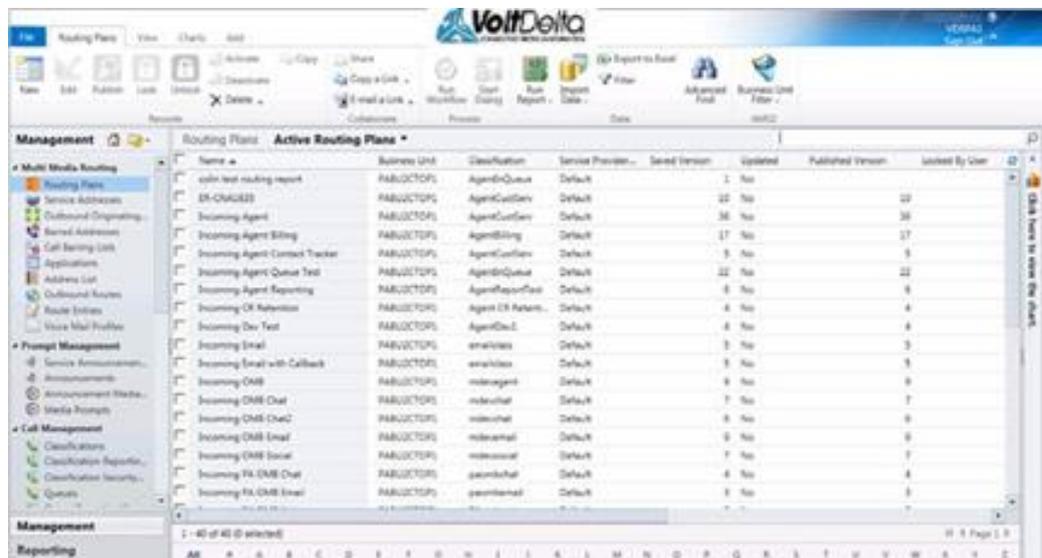
- 1 Open an Internet Explorer web browser and enter the address for the Management Portal

The Sign In window is displayed:



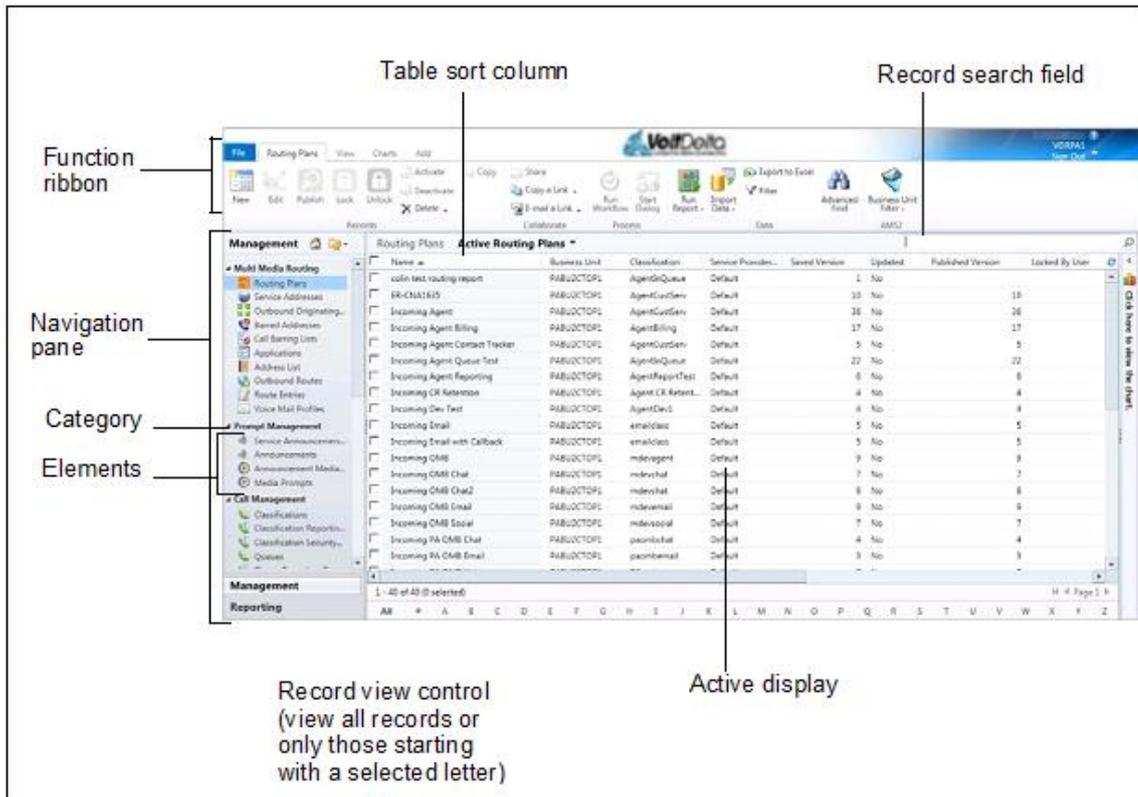
- 2 Enter your user name and password..
- 3 Click **Sign In**

The default page of the Management Portal is displayed. The appearance of the screen varies, depending on the tenant level and permissions associated with your user ID. Chapter 1.6, [Management Portal User Interface Details](#) describes the user interface.



1.6.2 Management Portal User Interface Details

The figure below shows the main components of the user interface that you will commonly use when working with the Management Portal.



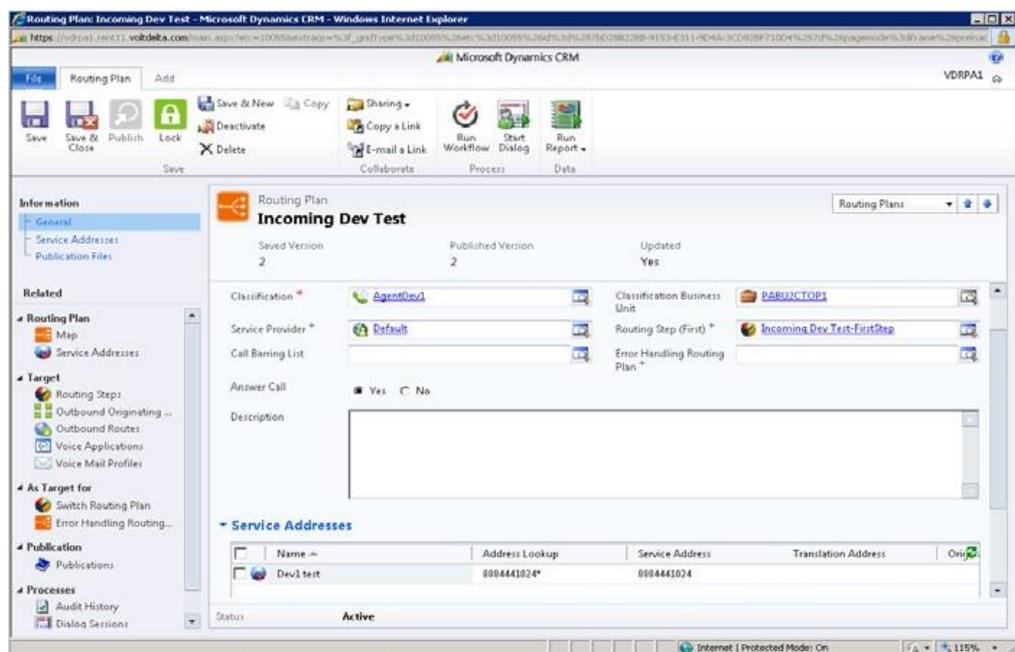
Note the following about the figure above:

- You access the Management Portal functions through the navigation pane. The functions are organized into a series of categories such as Call Management, Publications, User Management, Queue Management, and Administration. Each category contains one or more elements that enable you to access a specific Management Portal function.
- When you select an element in the navigation pane, the active display lists the currently active records for that element in the active display. The columns that display are sorted by the column with the blue background. To display the columns in reverse

order, click the column heading. To sort the records by a different column, click the desired column heading.

- To limit the number of records that display in the active display, you can do one of the following:
 - Click a letter in the view control bar to display only records that start with that letter.
 - Enter a full or partial search string in the record search field.
- The icons that display in the function ribbon depend on the selection made in the navigation pane. Items that are available in the current active display are shown in full color. Items that are dimmed (grayed) are not available.

When you create a new record or edit an existing record, the record displays in a new window. The figure below shows an example of a record window.

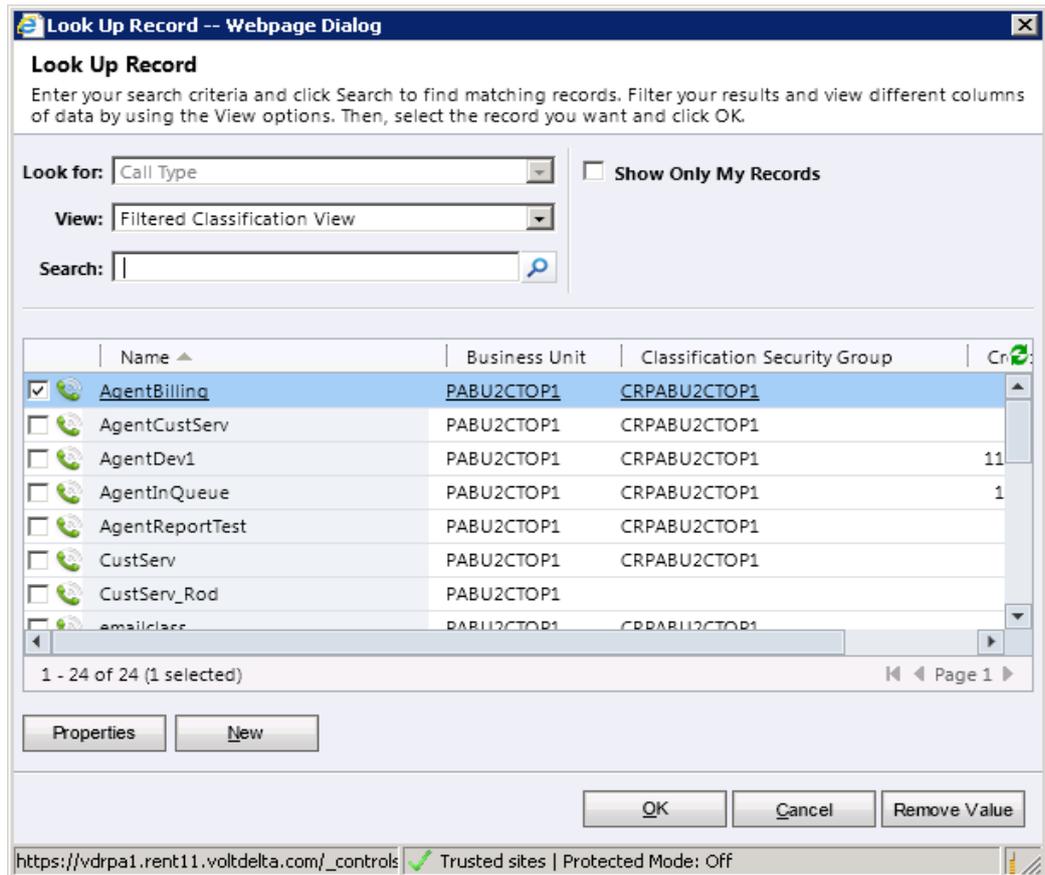


Note the following about the figure above:

- The functions you can perform in the window are shown on the ribbon.
- Mandatory entry fields are denoted with a red asterisk (*) next to the field title.
- Record windows can contain tables, which when clicked will enable additional buttons in the ribbon. In the figure, the Service Addresses area contains such a table. The Publish button appears

when the saved version is greater than the Published version for this record.

- If a field in this window requires selection of a value from a list, the field displays a search icon to the right of the field (🔍). When you click the search icon, a Look Up Record window is displayed, similar to the figure below



Select the check box in front of the record you want to select, and then click **OK**. You are returned to the record window and the value you selected is displayed in the field.

If desired, you can filter the records that display in the Look Up Record window by entering search criteria in the top portion of the window and then clicking **Search**.

In the Management Portal interface, entry fields are organized into logical groupings related to the functions provided. For reference, each field has an available tooltip that contains useful information for entering

data in the field. To display a tooltip, hover your mouse pointer over the field and wait for the tooltip to display.

The figure below shows an example tooltip for the field, “Allow Outbound Calls?”



The screenshot displays a configuration panel titled "Outbound Calls". It contains three main fields:

- Allow Outbound Calls?**: A radio button field with "No" and "Yes" options. The "Yes" option is selected. A tooltip is displayed over this field with the text "Can the Agent generate outbound calls?".
- Outbound Call Service Provider**: A dropdown menu showing "Default".
- Outbound Call Classification**: A dropdown menu showing "Outbound".

2 Business Units

2.1 Overview

A Business Unit is a separate entity in the OASIS system that is set up with its own configuration and management information. For information about Business units and other hierarchical entities, refer to chapter 1, [Tenant Overview](#).

This chapter provides the following information on working with Business Units:

- Working with Business Units
- Working With Products
- Creating Not Ready Sub-States

2.2 Working with Business Units

This chapter contains the following topics:

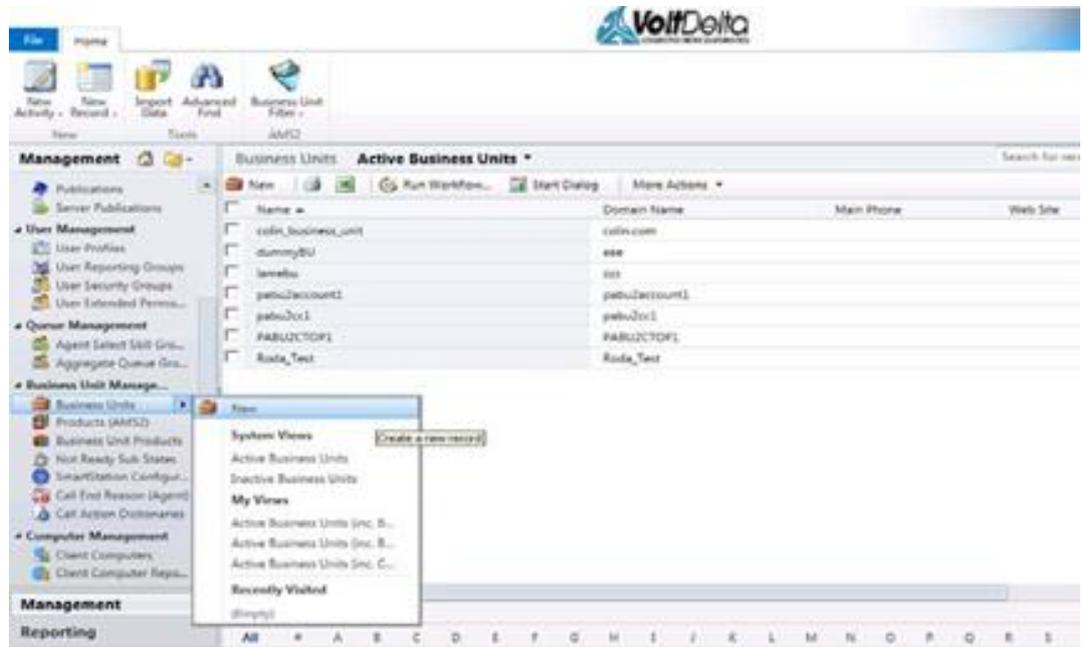
- Creating a Business Unit
- Editing Business Units
- Deleting a Business Unit

2.2.1 Creating a Business Unit

To create a new Business Unit, do the following:

- 1 In the Management Portal navigation pane, click to expand the **Business Unit Management** category

- Under the Business Unit Management category, right-click **Business Units** and then choose **New**.



The Business Unit: New dialog is displayed:

Business Unit: New

Information

General

Name *

Parent Business *
PABU2CTOP1

Domain Name *
Business Unit Role *

Division

Tenant ID

E-mail

Main Phone

Web Site

Other Phone

Fax

Create Status
In Progress

Addresses

Status: New

- Enter data in the following fields, at a minimum, complete at least the mandatory items (denoted in the dialog by a red asterisk):



Be careful when entering Business Unit parameter values. A Business Unit cannot be deleted once it has been created. Refer to chapter 2.2.3, [Deleting a Business Unit](#).

Dialog item	Description
Name	The name of the Business Unit. When specifying a name, do not enter the apostrophe character (')
Business Unit Role	Select the appropriate role for the Business Unit, as follows: <ul style="list-style-type: none"> • If the Parent Business is the "Reseller" then select Contact Operation. • If the Parent Business is the Contact Operation then select Contact Centre (In Source), Contact Centre (Out Source), or Account (For details about these entities, refer to chapter 1.4.1, Business Units Overview)
Domain Name	Enter a UPN suffix under which all users of the new Business Unit will be created. This Domain is used for all logins (for example, bob@bobco). The entry does not require the addition of ".com" or other domain suffix. The Domain must be unique within the Management Portal.
Parent Business	Select the Business Unit immediately above you in the Management Portal Business Unit hierarchy. For example, if your company is a Contact Operation, select the Reseller above you in the hierarchy as the Parent Business.

- 4 Click **Save & Close** at the top of the dialog to create the Business Unit.



The creation of the Business Unit with appropriate templates and default values can take a few minutes. Wait until the Business Unit appears in the Business Unit list display before proceeding with other tasks related to the Business Unit. If desired, click **Refresh** to update the Business Unit list.

- 5 Continue on with Adding Products to your Business Unit as described in chapter 2.3.1, [Adding a Product to a Business Unit](#)

2.2.2 Editing Business Units

To edit the properties of an existing Business Unit, do the following:



For newly created Business Units, Products must be added and enabled before the Product attributes are available in the Business Unit to edit.

- 1 In the Management Portal navigation pane, click to expand the **Business Unit Management** category
- 2 In the list of displayed Businesses Units, click the name of the Business Unit that you want to edit.
- 3 Edit the fields as required. Click **Save and Close** when you are finished. The table below describes the parameters for the Business Unit dialog:

Field	Description
General	
Name	Unique name of the Business Unit. The name cannot contain spaces.
Parent Business	Parent Business Unit under which this unit is created.
Domain Name	User-defined UPN suffix that is used for creating users under this Business Unit. For example, xyz.com.
Business Unit Role	Defines the Business Unit role for the Business Unit.
Division	Title of the division.
Management Portal tenant ID	A three-character identifier to represent a Business Unit.
E-mail	E-mail address for the Business Unit.
Main Phone	Main telephone number for the Business Unit.
Web Site	Web site for the Business Unit.
Other Phone	Additional telephone number for the Business Unit.

Field	Description
Fax	Fax number for the Business Unit.
Create Status	The creation status of the Business Unit, such as In progress, Complete, and so on.
Addresses—Bill To Address	
Street 1	Street address for billing.
State/Province	State or province for billing.
Street 2	Additional street information for billing.
ZIP/postal Code	ZIP or postal code for billing.
Street 3	Additional street information for billing.
Country/Region	Country or region information for billing.
City	City name for billing.
Addresses—Ship To Address	
Street 1	Street address for shipping.
State/Province	State or province for shipping.
Street 2	Additional street information for shipping.
ZIP/postal Code	ZIP or postal code for shipping.
Street 3	Additional street information for shipping.
Country/Region	Country or region information for shipping.
City	City name for shipping.
Call Distribution System—Media	
Media Class Mode	Determines whether the BU will use Media Classes or Media Types to apportion calls for Quota Routing. For details, refer to chapter C.2, Setting Media Class Mode (Business Unit Setting).
Computer Telephony Integration-Consult and Transfer	

Field	Description
Allow Decline for Consultations?	Determines whether the person who is being asked for a consultation can decline the request. If the value is set to No, then a consultation is automatically accepted.
IP Station—Voice Control	
Agent Speaker Volume Up Key	System-wide key for volume up key. A value of 0 means no key is defined. (Applies to IP Station only.)
Agent Speaker Volume Down Key	System-wide key for volume down key. A value of 0 means no key is defined. (Applies to IP Station only.)
Management Information System—Historic MIS	
Calls Offered Formula	Defines the formula used when calculating “Calls Offered” in the User/IVR Service Performance reports.
Calls Abandoned and Requeued Formula	Defines the formula used when calculating “Calls Abandoned %” and “Calls Requeued %” in the User/IVR Service Performance reports.
Service Level Formula	<p>Defines the formula used when calculating “Service Level” in the User/IVR Service Performance reports. the following abbreviations are used:</p> <ul style="list-style-type: none"> • AnCQT—Calls Answered in CQT • AbCQT—Calls Abandoned in CQT • C—Calls Offered formula <p>NB. The CQT is configured on a per Classification basis by the <i>Critical Answer Time</i> property in the Management Information section of the Classification form.</p>
Time Zone	Defines the time zone to assign to the collected statistics

Field	Description
Workstation—Agent Dashboard	
Enable Agent Dashboard?	Defines whether the workstation provides the Agent Dashboard functionality where personal statistics can be displayed to the Agent.
Agent Dashboard Update Interval	Update interval (in seconds) for the Agent Dashboard display.
Aggregate Time for KPIs	Period of time (in minutes) for aggregating the key performance indicators.

2.2.3 Deleting a Business Unit

The Management Portal does not support deletion of Business Units; however, Business Units can be deactivated by the System Host Administrator.

2.3 Working With Products

A Product is a functional area or logical collection of features within OASIS which are logically grouped for various purposes. Such features include, for example:

- Audio Recording
- Screen Recording
- SmartStation or Media Bar

Products are listed under the Business Unit Management section of the Management Portal as a list called Products. The Products list shows the Products available to the current User for sharing with and licensing to his subordinate Business Units.

Adding a Product means that a “parent” Business Unit has created a record for a Product in the Management Portal. A Product must exist in the Management Portal before it can be shared or enabled. This procedure is described in chapter 2.3.1, [Adding a Product to a Business Unit](#).

Sharing a Product means that a "parent" Business Unit grants one of more of its "child" Business Units the right to control the Product in the Products list. Chapter 2.3.2, [Sharing a Product](#) describes this procedure in detail. This is typically an operation granted to Resellers who wish to delegate managing of Products to its Contact Operations. If a Reseller is

going to control management of Products for all its Contact Operations, Contact Centres and Accounts, then sharing is not required.

Enabling a Product means that a "parent" Business Unit grants one of more of its "child" Business Units the right to actually use the product. *Enabling* is performed by declaring the desired product to be what is known as a "Business Unit Product". Chapter 2.3.3, [Enabling Business Unit Products](#) describes this procedure in detail.

This chapter contains the following topics:

- Adding a Product to a Business Unit
- Sharing a Product
- Enabling a Product

2.3.1 Adding a Product to a Business Unit

A Business Unit must contain one or more Products before any call processing can occur

To add a Product to a Business Unit, proceed as follows:

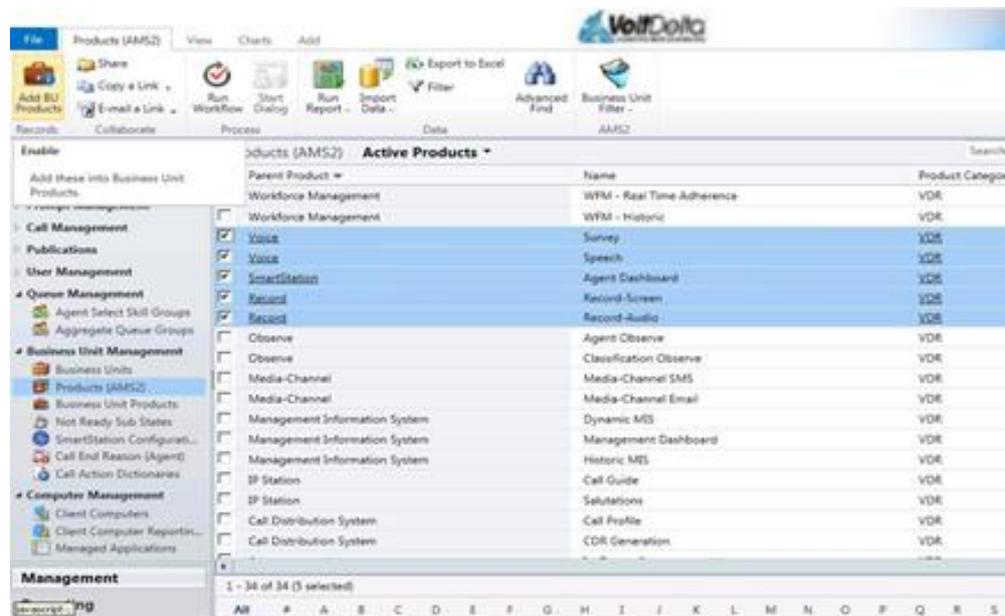
- 1 In the Management Portal navigation pane, select **Business Unit Management** → **Products** to display the list of active Products.



If the desired Product does not appear in this list, contact the administrator of your own Business Unit to ensure that he has shared the Product with your Business Unit.

- 2 Select the Products for the Business Unit.

3 In the ribbon, click **Add BU Products**



4 In the Look Up Records dialog, select your Business Unit, and click **OK** . A confirmation message is displayed.

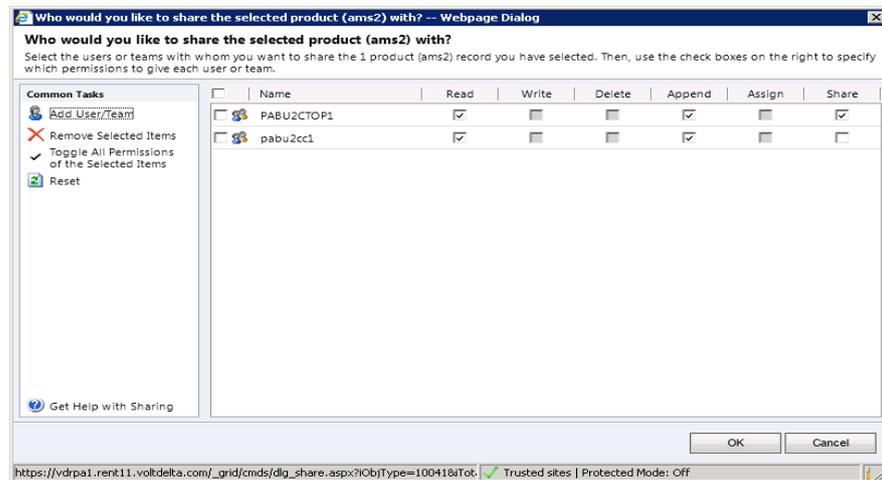
5 Optionally select **Enable** to enable the product immediately.

2.3.2 Sharing a Product

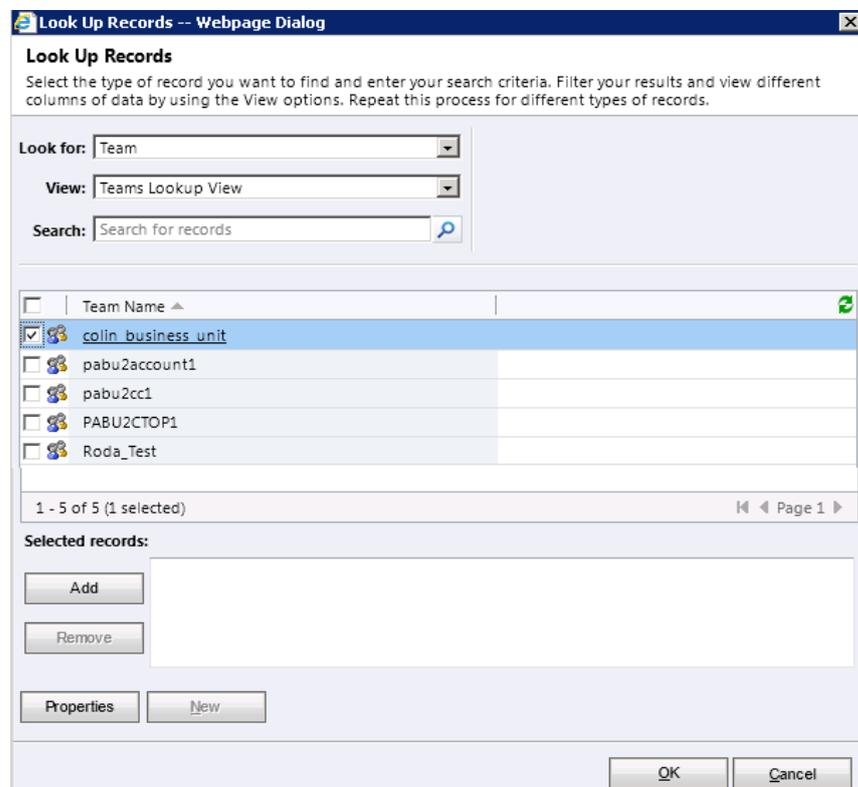
To share Products with another Business Unit, proceed as follows:

- 1 Ensure that you are logged in as a “Parent Tenant Administrator” to be able to share records with child Business Units
- 2 In the Management Portal navigation pane, select **Business Unit Management → Products**

- 3 Select the Products to be shared by clicking the check box associated with each of the products you want to share.
- 4 Click **Share** in the ribbon. The sharing dialog appears.



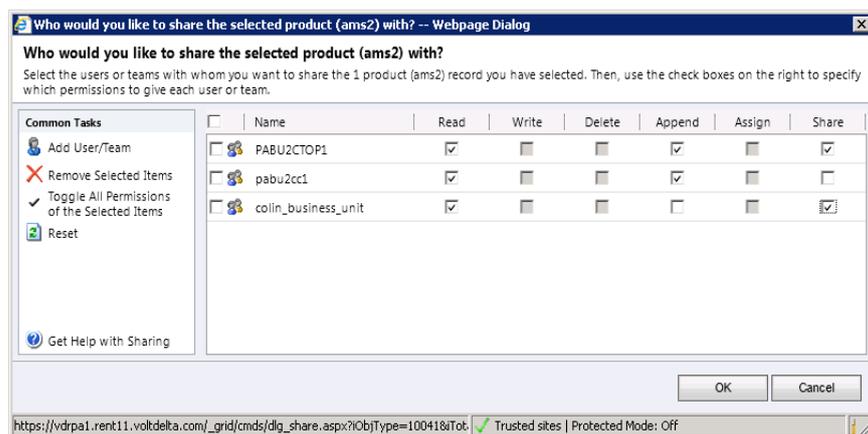
- 5 Select **Add User/Team**. The Look Up Records dialog appears.
- 6 In the Look For field, use the drop-down list to select **Team**, as shown in the following figure.





This step is important because the sharing is set by default to User-based, but sharing must be performed at Business Unit level.

- 7 In the Team Name list, click the appropriate Business Unit Team with which the Product shall be shared to add it to the Selected Records section below. (A “Team” means a Tenant/Business Unit.). To select multiple Teams, click their corresponding check boxes, and then click **Add** in the Selected records area.
- 8 Click **OK** to confirm your selection and return to the sharing dialog.
- 9 Select **Read** and **Append** permissions for each selected child Business Unit. Also select **Share** if the reseller is sharing with the Contact Operation. This will allow the Contact Operation to then share these products with their Contact Centre Business Units



- 10 Click **OK** to confirm your selections.

2.3.3 Enabling Business Unit Products

To enable Business Unit Products, a parent Business Unit must first create a Business Unit Product, and then enable the area (Product) to a subordinate (child) Business Unit

To enable a Business Unit Product for a child Business Unit, proceed as follows:

- 1 Ensure that you are logged in as a “Parent Tenant Administrator” to be able to enable records for child Business Units
- 2 In the Management Portal navigation pane, select **Business Unit Management** → **Business Unit Products**.

A list appears showing all Products available to you for licensing to your subordinate Business Units.

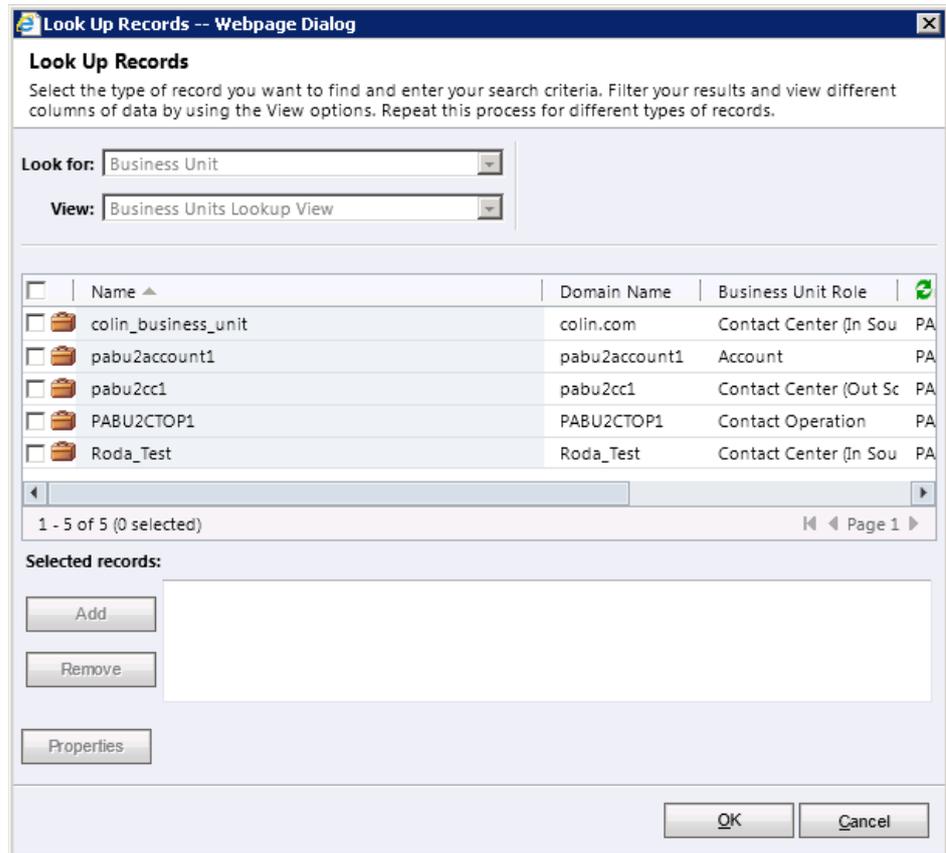


If the desired Product does not appear in this list, contact the administrator of your own Business Unit to ensure that he has shared the Product with your Business Unit.

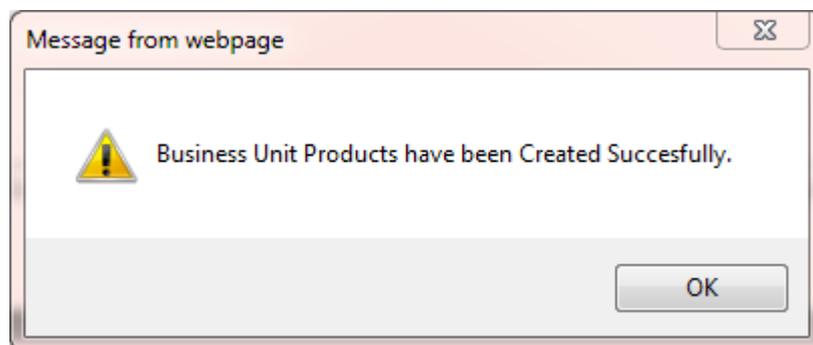
3 Select the Products for the Business Unit.

Parent Product	Name	Product Category	Ma	
<input type="checkbox"/>	Workforce Management	WFM - Historic	VDR	No
<input type="checkbox"/>	Workforce Management	WFM - Real Time Adherence	VDR	No
<input type="checkbox"/>	Voice	Speech	VDR	No
<input type="checkbox"/>	Voice	Survey	VDR	No
<input checked="" type="checkbox"/>	SmartStation	Agent Dashboard	VDR	No
<input checked="" type="checkbox"/>	Record	Record-Audio	VDR	No
<input checked="" type="checkbox"/>	Record	Record-Screen	VDR	No
<input type="checkbox"/>	Observe	Agent Observe	VDR	No
<input type="checkbox"/>	Observe	Classification Observe	VDR	No
<input type="checkbox"/>	Media-Channel	Media-Channel Email	VDR	No
<input type="checkbox"/>	Media-Channel	Media-Channel SMS	VDR	No
<input type="checkbox"/>	Management Information System	Dynamic MIS	VDR	No
<input type="checkbox"/>	Management Information System	Historic MIS	VDR	No
<input type="checkbox"/>	Management Information System	Management Dashboard	VDR	No
<input type="checkbox"/>	IP Station	Call Guide	VDR	No
<input type="checkbox"/>	IP Station	Salutations	VDR	No
<input type="checkbox"/>	Call Distribution System	Call Profile	VDR	No
<input type="checkbox"/>	Call Distribution System	CDR Generation	VDR	No
<input type="checkbox"/>	Announcements	In-Queue Announcement	VDR	No
<input type="checkbox"/>	360 Messenger	Email	VDR	No

- Click **Add BU Product** in the ribbon. The Look Up Records dialog appears.

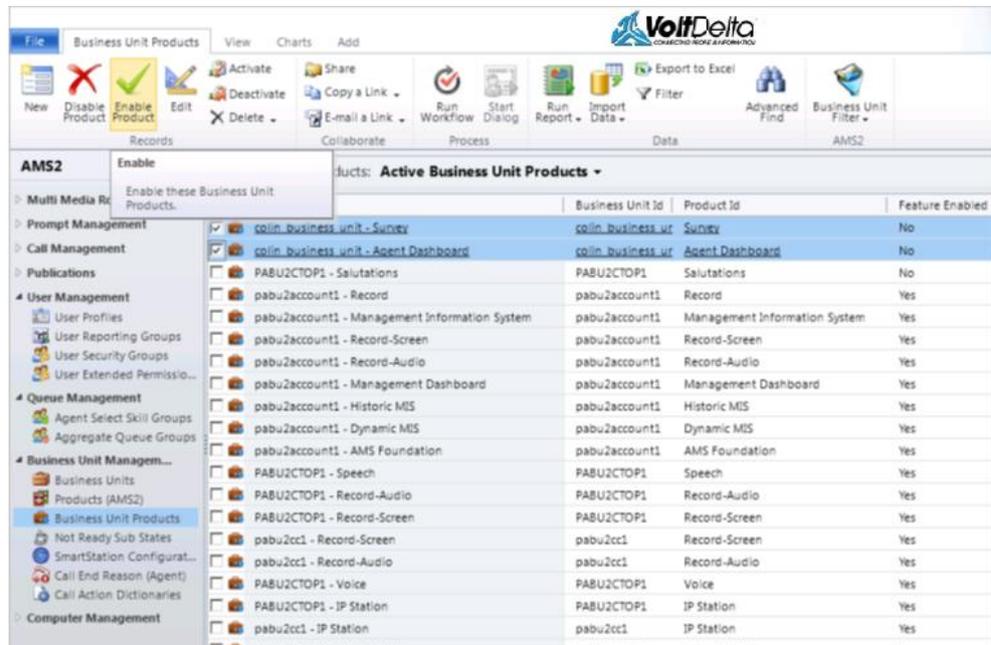


- In the Name list, click the appropriate Business Unit to which the Product shall be licensed..
- Click **OK** to confirm your selection. It may take a moment for the system to process the request before the following confirmation appears:



- Click **OK** to dismiss the confirmation dialog.

- 8 In the Management Portal navigation pane, under Business Unit Management, select **Business Unit Products**. A list appears showing all Business Unit Products available to your Business Unit.



- 9 Select the newly-created Business Unit Product that have just been created.
- 10 Click **Enable** to license the Business Unit Product to the selected child Business Unit.

2.4 Creating Not Ready Sub-States

SmartStation agents can place their SmartStation Media Bar in a Not Ready sub-state such as “Training” or “Coffee Break” to indicate the specific reason for the Not Ready status of their workstation. The Not Ready sub-states are configured for the entire Business Unit.

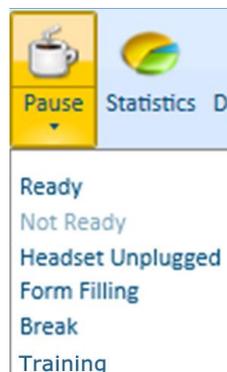
To create a new Sub State for a Business Unit, proceed as follows:

- 1 In the Management Portal navigation pane, select **Business Unit Management** → **Not Ready Sub States**.

The available Not Ready sub-states are displayed

- 2 In the ribbon, click **New**. The New Not Ready Sub State dialog is displayed

- 3 In the Name field, enter the name of the Not Ready sub-state. This name is displayed to the Agent on the workstation.
- 4 In the Business Unit field, select the Business Unit for which the record applies.
- 5 In the Number field, enter a unique number (0 to 9) to assign a position for the sub-state in the Workstation menu. A value of 0 places the sub-state at the top of the menu, and each successively larger number positions the sub-state lower in the menu. In the example that follows, “Not Ready” is 0, “Headset Unplugged” is 1, “Form Filling” is 2, and so on. (“Ready” cannot be configured and will always be at the top of the list).



- 6 Select the Type. The following Types are supported:

Type	Description
Disabled	The Not Ready Sub State will not be made available to Agents.
After Call Work	This type of Not Ready Sub State is typically used for Not Ready Sub States that Agents will use immediately after finishing a call. For example “Form Filling”.
Non Working -	This type of Not Ready Sub State is typically used for Not Ready Sub States that Agents will use between calls, where they are not necessarily related to the processing of the call. For example “Lunch”, “Break”.
Other Work	This type of Not Ready Sub State is typically used for Not Ready Sub States that Agents will use for other work between calls, where they are not necessarily related to the processing of the call.

7 Click **Save & Close** in the ribbon

3 Classifications, Queues and Combined Call Types

3.1 Overview

Each call is assigned a Classification and a Service Provider in order to determine how the call should be processed. The Classification and Service Provider may be changed during the lifetime of a call.

A Queue is used to route a call to an agent or to a system that automatically processes the call. For certain outbound call services, you must create a combined call type, which includes a classification and a queue.



In some instances, Classifications and Queues are also known as “Call Types”.

This chapter provides information on the following topics related to the administration of Classifications, Queues, and Combined Call Types:

- About Templates
- Working with Queues
- Working with Classifications
- Working with Combined Call Types (Classification and Queue)
- Assigning Service Announcement Profiles to Classifications or Queues
- Activating and Deactivating Items (Queues, Classifications and Combined Call Types)
- Publishing an Item (Classification, Queue or Combined Call Type)



When both the current Classification and Queue have a Service Announcement Profile specified, only the Service Profile in the Classification is used.

3.2 About Templates

A template contains a set of values that has been saved on the Management Portal to enable entities such as Queues, Classifications, and Users to be quickly created. A template belongs to only one Business

unit, and contains a set of default values that has been tailored for use with that Business Unit.

Default templates are automatically created when each Business Unit is created. When you create a new entity, (such as a Queue, Classification, or User) you must always base the entity on a template that exists for the Business Unit. Many values in the template are automatically populated. If desired, values can be changed or added, or different templates can be created with different values.

3.3 Working with Queues

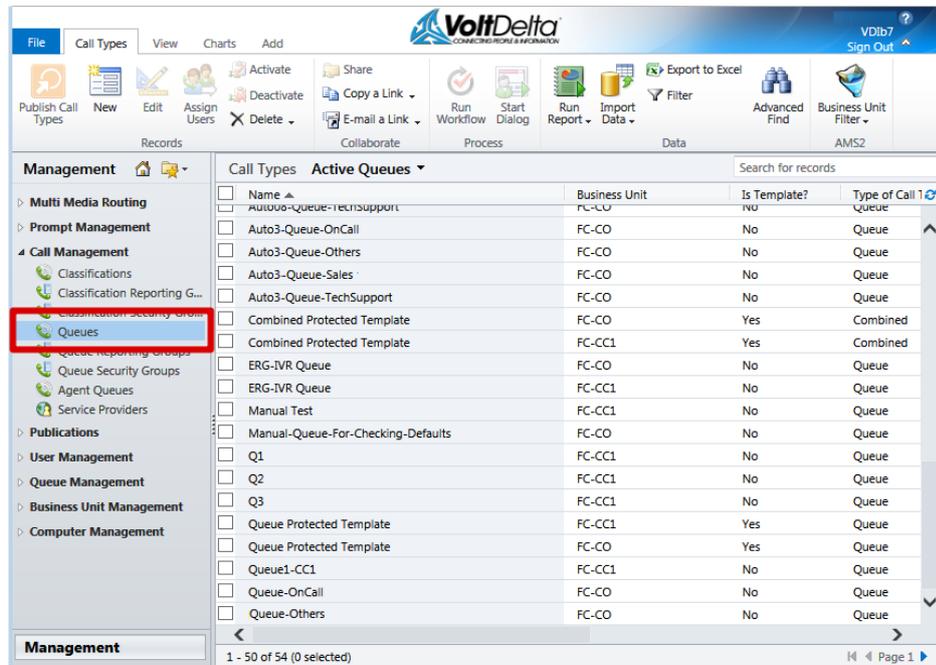
This chapter contains the following topics:

- Creating a Queue
- Editing a Queue
- Deleting a Queue

3.3.1 Creating a Queue

To create a queue, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management → Queues**.



- 2 Click **New** in the ribbon

The queue creation dialog is displayed.

The screenshot shows the VoltDelta software interface for creating a new Call Type. The ribbon menu includes options for Save, Save & Close, Delete, Publish Call Type, Sharing, Copy a Link, E-mail a Link, Collaborate, Run Workflow, Start Dialog, Process, and Run Report. The main area is titled 'Call Type New' and contains the following fields and options:

- Name ***: A text input field.
- Created From**: A dropdown menu.
- Description**: A text input field.
- Is Template?**: Radio buttons for No and Yes.
- Status**: A dropdown menu set to **Active**.

The left sidebar shows a navigation tree with categories like Classification and Queue, containing various sub-items such as Routing Steps, Performance Param..., Service Providers, and Call Records.

3 In the Name field, enter a name for the queue

- Click the button next to the Created From field to select a template.



Queues and Classifications must always be created from a template for the required Business Unit.

The Look Up Record dialog is displayed:

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Show Only My Records

View:

Search:

	Name	Business Unit	Is Template?	Save
<input type="checkbox"/>	ss_email_transrer	pabu2cc1	No	
<input type="checkbox"/>	sales operator	pabu2cc1	No	
<input type="checkbox"/>	Reportagent_in	pabu2cc1	No	
<input type="checkbox"/>	Queue Protected Template	Roda_Test	Yes	
<input type="checkbox"/>	Queue Protected Template	pabu2cc1	Yes	
<input checked="" type="checkbox"/>	Queue Protected Template	colin_business_ur	Yes	
<input type="checkbox"/>	Queue Protected Template	dummyBU	Yes	
<input type="checkbox"/>	Queue Protected Template	pabu2account1	Yes	
<input type="checkbox"/>	Queue Protected Template	PABU2CTOP1	Yes	
<input type="checkbox"/>	PAQue	pabu2cc1	No	
<input type="checkbox"/>	paombwebchatqueue	pabu2cc1	No	
<input type="checkbox"/>	PAombvoice	PABU2CTOP1	No	
<input type="checkbox"/>	PAombqueue	pabu2cc1	No	

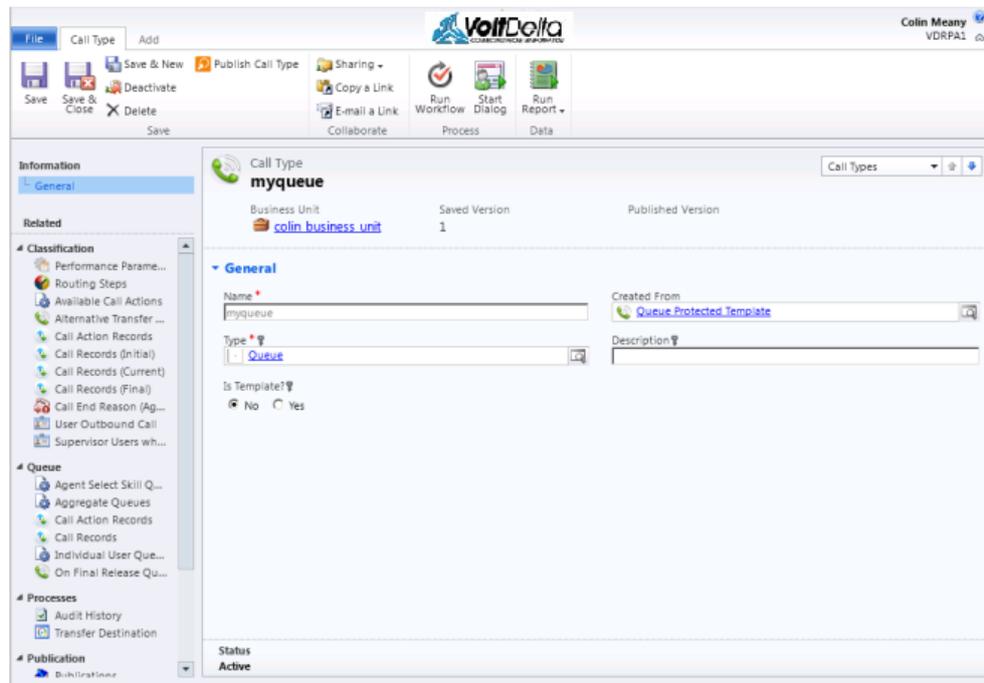
1 - 50 of 84 (1 selected) Page 1



If templates from multiple Business Units appear (depending on your user permissions) then click the **Business Units** column header to sort the list according to Business Unit name. This will make it easier to find your required template.

- Click the associated check box to select the **Queue Protected Template** for your required Business Unit, then click **OK**. You are returned to the Queue dialog.
- Click **Save**. All the properties for the Queue now appear in the dialog.

- 7 Click **Save & Close** to close the dialog with all the properties set to their default values.



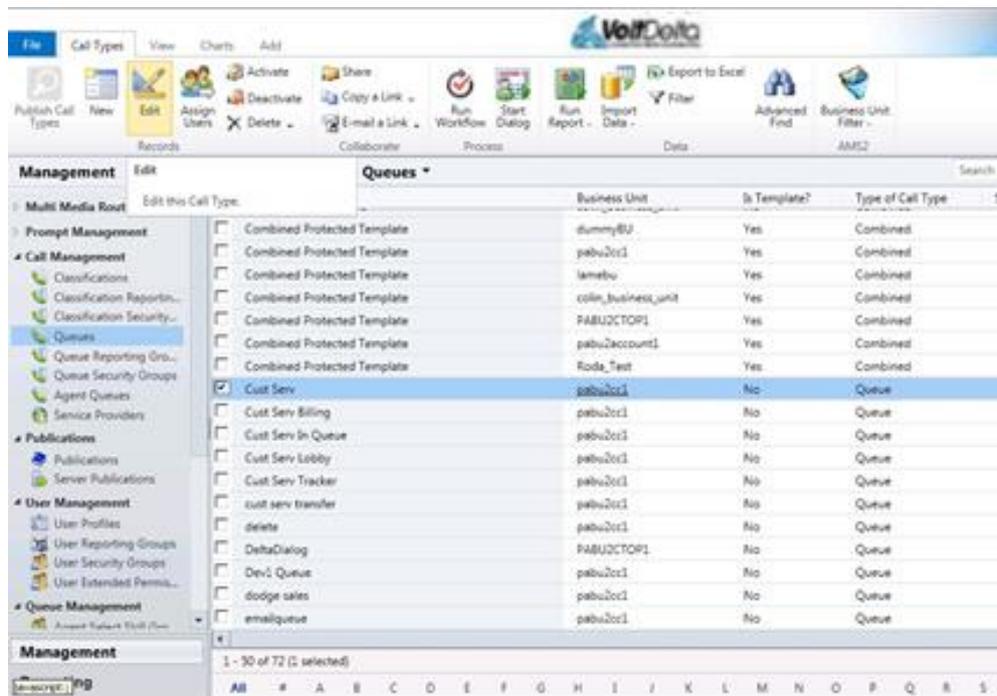
- 8 Then Publish the Queue. Refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#).

3.3.2 Editing a Queue

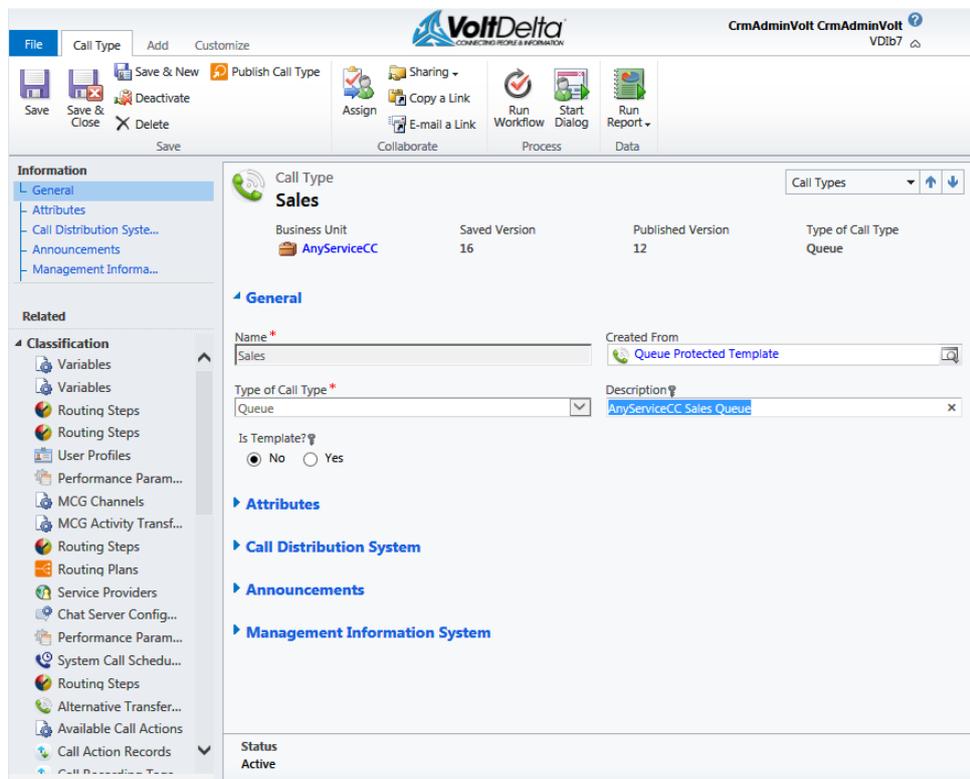
To edit a Queue, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Queues**, The active Queues dialog is displayed.

2 Select the record to edit, then click **Edit**.



The Queue dialog is displayed.



- 3 Edit the fields as required, then click **Save**. The table following describes the parameters for the Queue dialog:
- 4 Then Publish the changes. Refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#).

Field	Description
General	
Name	The name of the Queue.
Created From	The template or existing Queue from which this Queue was created.
Type	Identifies this entity as a Queue.
Description	Description of the Queue.
Is template?	Defines whether this Queue is a template.
Attribute—Attributes	
Tenant Hierarchy	The fully qualified name hierarchy for the Tenant\Business Unit owning the Queue.
Tenant Hierarchy ID	The fully qualified Tenant ID Hierarchy for the Tenant\Business Unit owning the Queue.
System Name	The System name from the Organizational Properties.
Attribute—Security Groups	
Queue Security Group	Identifies the Queue Security Group of which the Queue is a member.
Call Distribution System—Queue	
Enable User Priority Precedence?	Defines whether the highest priority user is chosen for call presentation regardless of idle time.
Dependent Queue	List of queues that are checked when deciding whether to accept/reject incoming call.
Maximum Caller to User Ratio	Maximum ratio of callers in queue to agents servicing this queue.

Field	Description
Maximum Estimated Waiting Time to Enter Queue	The maximum estimated waiting time (in seconds) for a new call to enter a queue. A value of 0 (zero) disables this check
Queue Answer Treatment	Determines when or if the call is answered when the route to queue operation is processed. Normally, calls are answered during the queuing phase. Consult with your System Host Administrator if required.
Maximum Queue Time On Queue Entry	The maximum current queue time (in seconds) allowed for a new call to enter the queue. A value of 0 (zero) disables this check.
Allow Queue When Queue is Closed?	Determines whether the call can be re-queued when no Agent is servicing the Queue.
Queue for Re-Queue Error	Queue to use when a call is re-queued due to an error.
Change Classification on Re-Queue Error?	Whether to change the Classification for the call to the default Classification when the call is re-queued because of an error.
Call Distribution System—Call Priority	
Service Priority	Defines the default service priority applied to the Queue. Supported values are 0 through 9,999, increasing in priority.
Boost Step Interval	The number of seconds after which to apply each Priority Boost. For example, a call has a Service Priority of 200, and the Boost Step Interval is 5 seconds, and the Priority Boost value is 10. After 60 seconds in queue, the call's Priority is 320, as shown in the following calculation: $200 + ((60/5) \times 10)$

Field	Description
Priority Boost After Step Interval	The boost applied to the effective call priority after the step interval period expires.
Call Distribution System—Parking	
Allow Calls to a User with a Parked Call?	Allows calls to be presented to an agent who has parked calls. Set the value to No for Text Relay Shared Transferred Queues.
Announcements—Service Announcement	
Service Announcement Profile	The Service Announcement Profile applied to the Queue.
Management Information System—Dynamic MIS	
AWT Threshold	The number of seconds before the Average Waiting Time Alert threshold expires. When this is exceeded, a red Alert symbol is displayed in the Agent Dashboard on the agent's workstation as well as in the Management Dashboard.
AWT Warning Threshold	The number of seconds before the Average Waiting Time Warning threshold expires. When this is exceeded, a yellow Warning symbol is displayed in the Agent Dashboard on the agent's workstation as well as in the Management Dashboard.
Service Level Threshold	The service level threshold (as a percentage). When this is exceeded, a red Alert symbol is displayed in the Agent Dashboard on the agent's workstation as well as in the Management Dashboard.
Service Level Warning Threshold	The service level warning threshold (as a percentage). When this is exceeded, a yellow Warning symbol is displayed in the Agent Dashboard on the agent's workstation as well as in the Management Dashboard.

Field	Description
Critical Answer Time	The time in which calls are expected to be answered or abandoned, in seconds.

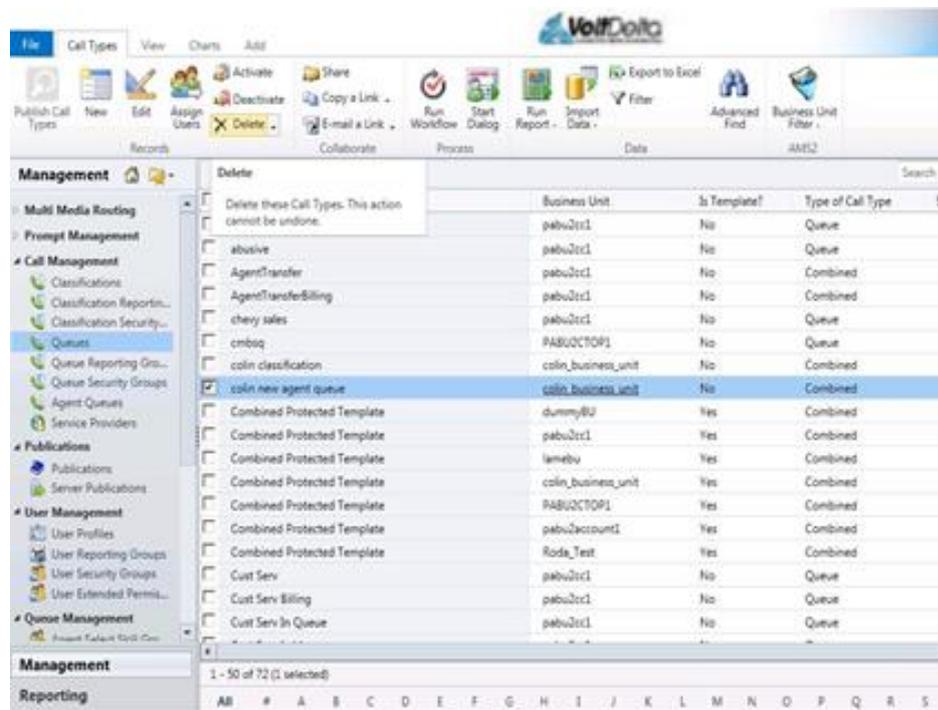
3.3.3 Deleting a Queue

When a Queue is deleted, it is automatically unpublished from the system. For details on publishing, refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#)

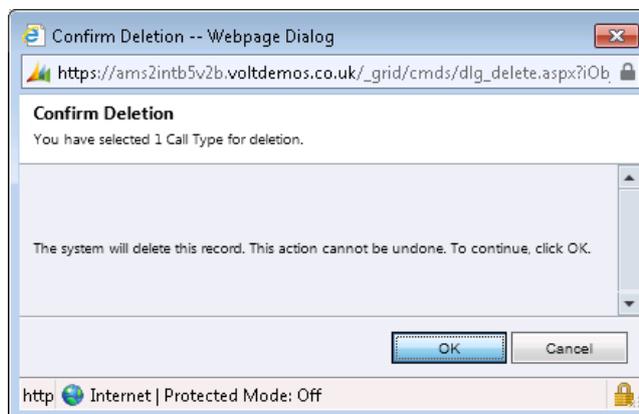
To delete a Queue, proceed as follows:

- 1 In the left-hand window pane, select **Call Management** → **Queues**.

2 Select the record to delete, then click **Delete**.



The following confirmation dialog is displayed..



3 Click **OK** to confirm the deletion.

3.4 Working with Classifications

A Classification enables traffic to be classified for reporting purposes

This chapter contains the following topics:

- Creating a Classification
- Editing a Classification
- Deleting a Classification

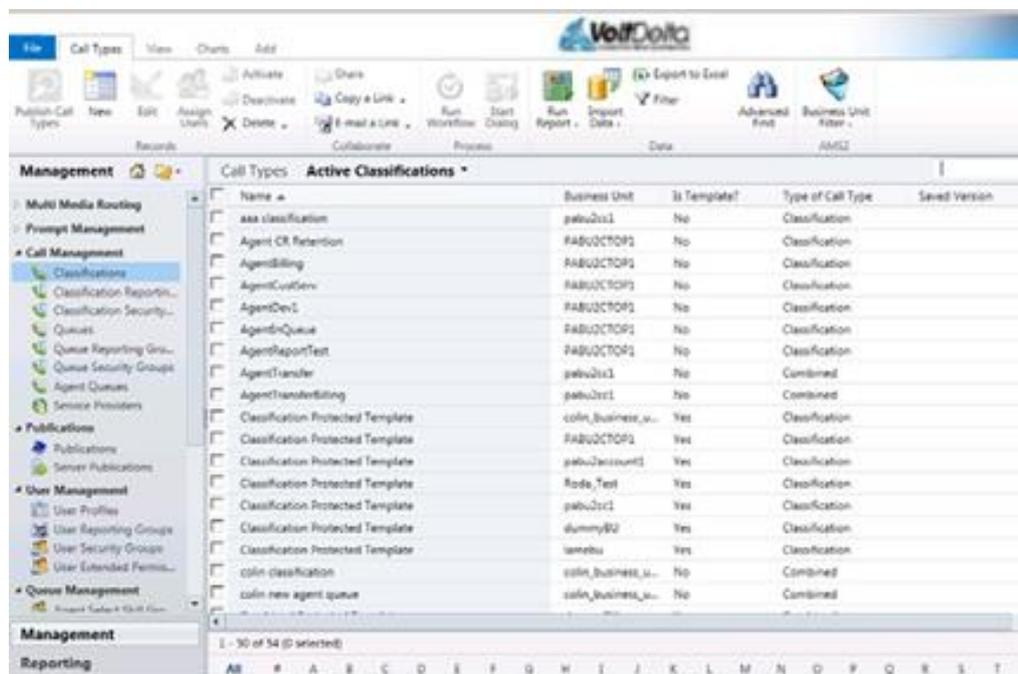
3.4.1 Creating a Classification

The process of creating a Classification is very similar to creating a Queue (as described in chapter 3.3.1, [Creating a Queue](#)).

To create a Classification, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management → Classification**.

The Classification dialog is displayed:



2 Click **New** in the ribbon.

The dialog to create a new Classification is displayed.

The screenshot shows the VoltDelta web application interface. The browser address bar displays a URL starting with 'https://vdrpa1.rent11.voltdelta.com/'. The application has a ribbon menu with 'File', 'Call Type', and 'Add' tabs. The 'Call Type' ribbon is active, showing options like 'Save', 'Save & Close', 'Delete', 'Publish Call Type', 'Share', 'Copy a Link', 'E-mail a Link', 'Collaborate', 'Run Workflow', 'Start Dialog', and 'Run Report'. The main content area is titled 'Call Type New' and includes a 'Call Types' dropdown menu. Below this, there are fields for 'Business Unit', 'Saved Version', and 'Published Version'. The 'General' section contains a 'Name' field with an asterisk, a 'Created From' dropdown, a 'Description' text area, and an 'Is Template?' section with radio buttons for 'No' (selected) and 'Yes'. At the bottom, the 'Status' is set to 'Active'. A left-hand navigation pane lists various categories like 'Classification', 'Queue', and 'Processes' with sub-items.

3 In the Name field, enter a Name for the classification

- Click the button next to the Created From field to select a template.



Queues and Classifications must always be created from a template for the required Business Unit.

The Look Up Record dialog is displayed.

	Name	Business Unit	Is Template?	Save
<input type="checkbox"/>	AgentInQueue	PABU2CTOP1	No	
<input type="checkbox"/>	AgentDev1	PABU2CTOP1	No	
<input type="checkbox"/>	CustServ_Rod	PABU2CTOP1	No	
<input type="checkbox"/>	Outbound	PABU2CTOP1	No	
<input type="checkbox"/>	DeltaDialog	PABU2CTOP1	No	
<input checked="" type="checkbox"/>	Classification Protected Template	PABU2CTOP1	Yes	
<input type="checkbox"/>	Combined Protected Template	PABU2CTOP1	Yes	
<input type="checkbox"/>	Queue Protected Template	PABU2CTOP1	Yes	
<input type="checkbox"/>	PAClass	PABU2CTOP1	No	
<input type="checkbox"/>	PACO Combined Template	PABU2CTOP1	Yes	
<input type="checkbox"/>	PACO Combined	PABU2CTOP1	No	
<input type="checkbox"/>	AgentCustServ	PABU2CTOP1	No	



If templates from multiple Business Units appear (depending on your user permissions) then click the **Business Units** column header to sort the list according to Business Unit name. This will make it easier to find your required template.

- Select the **Classification Protected Template** for your required Business Unit, then click **OK**.

You are returned to the Classification dialog.

6 Click **Save**.

All the properties for the Classification will appear in the dialog.



Use the items under Information at the top of the navigation bar to jump to different groups of properties in the dialog.

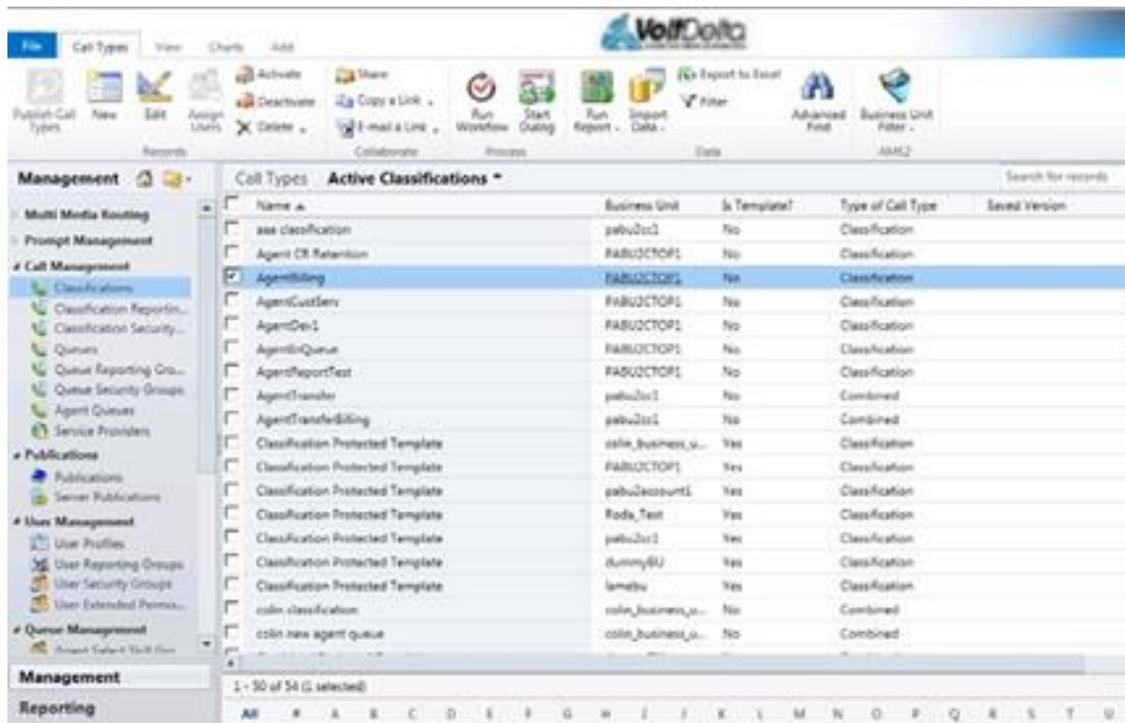
- 7 Click **Save & Close** to close the dialog with all the properties set to their default values.
- 8 Then Publish the Classification. Refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#)

3.4.2 Editing a Classification

To edit a Classification, proceed as follows:

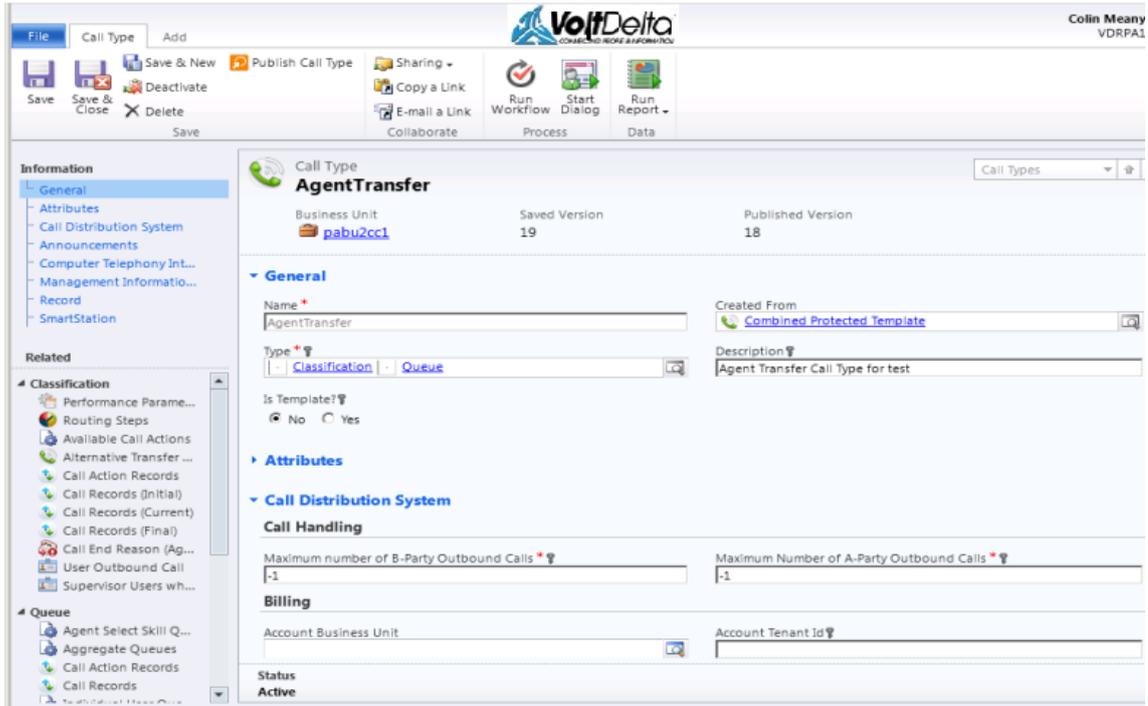
- 1 In the Management Portal navigation pane, select **Call Management** → **Classifications**.

The Active Classifications dialog is displayed



- 2 Select the record to edit, then click **Edit**.

The Classification dialog is displayed.



- 3 Edit the fields as required, then click **Save**. The table following describes the parameters for the Classification dialog.
- 4 Then Publish the Classification. Refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#)

Field	Description
General	
Name	The name of the Classification. The value must be unique within the Business Unit.
Created From	Displays the name of the template or existing Classification from which this record was created.
Type	Identifies this entity as a Classification.
Description	A description for the Classification.
Is Template?	Determines whether this record is a template.
Attribute—Attributes	

Field	Description
Tenant Hierarchy	The fully qualified name hierarchy for the Tenant\Business Unit owning the Queue.
Tenant Hierarchy ID	The fully qualified Tenant ID Hierarchy for the Tenant\Business Unit owning the Queue.
System Name	The System name from the Organizational Properties.
Attribute—Security Groups	
Classification Security Group	The name of the Classification Security Group of which this Classification is a member.
Call Distribution System— Call Handling	
Maximum number of B-party Outbound Calls	Maximum number of permitted B-Party out-dials during the lifetime of the call. A value of -1 means infinite.
Maximum number of A-party Outbound Calls	Maximum number of permitted A-Party out-dials during the lifetime of the call. A value of -1 means infinite.
Call Distribution System— Billing	
Account Business Unit	Related Account Business Unit.
Account Tenant ID	Tenant ID for the Account Business Unit.
Account Tenant Hierarchy	The fully qualified tenant name hierarchy for the Tenant/Business Unit that is assigned to the Classification as the Account Tenant.
Account Tenant Hierarchy ID	The fully qualified tenant identifier hierarchy for the Tenant/Business unit that is assigned to the Classification as the Account Tenant
Call Distribution System— In-Queue Treatment	
On DTMF Re-Queue Timeout	Inter-DTMF-digit timeout (in milliseconds) allowed before a re-queue is triggered.

Field	Description
Call Treatment Language	The language to use for call treatments such as announcements.
Valid DTMF Digits	List of the valid DTMF digits that can trigger a re-queue while in queue. For example, 12390#
Call Distribution System— Media	
Media Type	The type of media (such as voice, e-mail, chat, SMS, and so on) used by the call.
Media Class	The Media Class to which the Classification belongs. A Media Class enables a logical grouping of similar Media Types to be treated the same for Quota Routing purposes. For information about Quota Routing, refer to Appendix C, Quota Routing.
Quota Interruption Mode	Determines the Quota Interruption Mode for the Classification. The relative priority of Media Classes is defined by the Agent's Media Class Order of Precedence, in the Media Channel Quotas table of the User Profile. For details, refer to Appendix C.3.2, Quota Interruption Mode.
Quota Routing Guard Time	For Quota Routing, defines the time (in seconds), during which no calls will be presented to an Agent, following the previous presentation/interruption. This timer ensures a reasonable elapsed time between calls. Specify a value from 0 to 36000; a value of 0 disables the timer. For details, refer to Appendix C.3.3, Quota Routing Guard Time
Call Distribution System— Outgoing Call Treatment	

Field	Description
Queue for No Answer Timeout	Queue to use when re-queuing a call because the called party did not answer in the time specified in “Re-Queue on No Answer Timeout.”. If the field is empty, the currentClassification of the call is used.
Re-Queue on No Answer Timeout	The period (in seconds) after which a call is re-queued if the called party does not answer. A value of 0 disables the feature.
Outbound Call Barring List	The Call Barring List to use when making outbound calls.
Call Distribution System—Queue	
Accept Timeout	The time (in seconds) that a call can ring at an Agent workstation before the call is re-queued. The value should be greater than the User Profile setting, "Accept Timeout".
Allocate Conference to Incoming Call	Defines whether to create a conference and attach it to an incoming call.
Allow Re-Queue when Queues are Closed?	Allows the call to be re-queued when no user agent is servicing the queue.
A-Party Treatment on Agent Ringing	A-Party Treatment applied while waiting for the selected External Voice Agent to accept the call (desktop or SIP phone only). •
B-Party Treatment on Re-Queue	Treatment applied to the B-Party when the call is re-queued.
Maximum Queue Time	The maximum time (in seconds) that a call can remain in a queue.
Long Estimate Prompt Threshold	The estimated waiting time (in seconds) that causes a call to be marked as expecting a long wait in a Queue.

Field	Description
Re-Queue Trigger Timeout	After a call is relinquished, the time (in milliseconds) to wait for the other party to clear before re-queuing. A value of -1 means "Never queue"
Queue to Re-Queue to on Final Release	Defines the Queue to use when re-queuing calls on Final Release when "Re-Queue on Release" was specified on an earlier transfer.
A-Party Treatment No CLI	Treatment to apply to the A-Party when the call arrives without a CLI.
Requeue on Release Mode	Enables the "Re-queue on Release" feature, which allows a call to be re-queued when it would normally be released.
Change Classification on Relinquished Re-Queue?	Defines whether the Classification be changed when re-queuing a relinquished call.
Call Distribution System— Call Waiting (Interrupt)	
Auto answer for preferential call?	For preferential calls (where "Call Interruption Mode" has "Interrupting" set), defines whether calls are accepted automatically or manually.
Interruption Accept Timeout	For preferential calls, the interruption presentation time-out (in seconds) before which an agent user should go to a Ready state to handle the call.
Interruption Offer Timeout	For preferential calls, the interruption offer time-out (in seconds) before which an agent user should accept/reject the interrupting call.
Queue Interruption Delay	Defines the time (in seconds) that a call must be in queue before the CDS begins preferential alerting of suitable agents.
Call Interruption Mode	Defines whether a call is interrupting and/ or interruptible. A call that is "interrupting" can interrupt a call that an agent is currently handling, as long as that call is "interruptible"

Field	Description
Preferential Call Release Treatment	The release treatment to apply if the call is interruptible (when Call Interruption Mode is set to Interruptible).
Call Distribution System— Call Priority	
Service Priority	Default service priority applied for this Classification. You can use this setting to assign preferential call status to this Classification. Values are 0 through 9,999, increasing in priority.
Priority Boost After Step Interval	The boost (including optional tenths of a point) applied to the effective call priority after the step interval period has expired.
Boost Step Interval	The number of seconds after which to apply each Priority Boost. For example, a call has a Service Priority of 200, and the Boost Step Interval is 5 seconds, and the Priority Boost value is 10. After 60 seconds in queue, the call's Priority is 320, as shown in the following calculation: $200 + ((60/5) \times 10)$
Call Distribution System— Parking	
Allow Call Parking?	Parking enables an agent to handle another call and come back to the parked call later. Set to "No" for Text Relay Classifications.
Call Distribution System— VoIP	
Codec Preference List	The preferred order for selecting VoIP codecs. The first codec in the comma-delimited selection that is supported by both VoIP endpoints is used.
Announcements— Service Announcement	

Field	Description
Service Announcement Profile	The Service Announcement Profile applied to the Classification.
Announcements—Call Presentation	
Presentation Tone	<p> This feature is not currently supported.</p> <p>Defines for the Classification whether to play a Call Presentation Tone for the Agent voice leg before the call is connected. Values are as follows:</p> <ul style="list-style-type: none"> • None—Feature is disabled. • System—Plays the default System Tone. <p>Announcement—Plays a customized standard announcement created by the customer.</p>
Announcement	<p> This feature is not currently supported.</p> <p>When Presentation Tone is set to “Announcement,” specifies the audio that is played for the Presentation Tone.</p>
Announcements—Call Treatment	
Language	The language to use for call treatments such as announcements.
Gender	The gender to use for call treatments such as announcements.
Persona	The persona to use for call treatments such as announcements.
Computer Telephony Integration—After Call	
Agent Call End Reason Mode	The mode to be used for the Agent End Call Reason feature. This field determines whether the agent needs to provide an Agent End Call Reason when finishing the call.

Field	Description
Not Ready Sub State after Call	The Not Ready Sub State the agent enters automatically if the agent does not select a Not Ready Sub State while handing the call.
Resting Period (1/10th sec)	The time an agent is allowed to rest between calls (in tenths of a second).
Not Ready Sub State if Call not Accepted	The Not Ready Sub State the agent enters if the agent does not accept the call. This is applicable only if the agent is using the manual accept feature.
Computer Telephony Integration—Call Handling	
Call Arrival Tone	The duration and pitch of the arrival tone played to the agent. Applies to IP Station installations only.
Release Call when Parties clear?	Enables the position to be released automatically if an A- or B-Party hangs up and the opposite party is not connected. Set to Yes for Classifications used for Outbound services.
Call Lock Mode	Determines whether a call can be manually locked by the agent, or automatically locked on arrival at the agent position.
Allow release of Call if B-Party established?	Determines whether an A-Party-locked call can be relinquished if a B-Party is Ringing or Connected.
Clipboard Contents	Defines what is copied to the agent's clipboard on call arrival. Applies to IP Station and Terminal Server installations only.
Disable Release A-Party function?	Defines whether the Release A-Party function is allowed.
Clear Parties on Release?	Defines whether the A- and B-parties are released on call relinquish.

Field	Description
Disable Release Call when A-Party Present?	Defines whether a call can be released by an Agent when the A-Party is present.
Screen Popped Managed Application	Defines the managed application to be automatically displayed on the workstation on call arrival. Applies to IP Station and terminal Server installations only.
Computer Telephony Integration— Consult and Transfer	
Allow Consult on transfer?	Allows consultations for a call when using transfer functions.
Allow Queuing on Transfer?	Allows a transfer operation to queue if an agent is not immediately available.
Tone played after Consultation	The duration and pitch of the consult end tone. Applies to IP Station installations only.
Tone played before Consultation	The duration and pitch of the consult start tone. Applies to IP Station installations only.
Computer Telephony Integration— Outbound	
Connect to Parties	Defines which parties can be connected on this call.
Outbound CLI	The CLI to use in outbound calls for this Classification if the "Type of Outbound CLI" field is set to "By Classification."
Type of Outbound CLI	Defines how the CLI and CI restriction flag are populated for outbound calls.
Outbound CLI Prefix	Prefix to be prepended to CLI if the "Type of Outbound CLI" field is set to "A-Party with Prefix and Extension."
Mark Outbound CLI as Restricted?	Defines whether to mark as Restricted the CLI used in the outbound call.
Outbound CLI Extension	Extension to be appended to CLI if the "Type of Outbound CLI" field is set to "A-Party with prefix and Extension."

Field	Description
Computer Telephony Integration— Speech	
Speech State on Accept	The Speech State applied to the call when it is accepted at the Agent position
Speech State on Unpark	The Speech State applied when the call is activated from a parked state.
Speech State on Re-Presentation	The Speech State applied to a Re-Presented call when it arrives at the Agent.
Speak with Parties Options	Defines whether (and how) to allow the "Speak Both" feature.
Presentation Speech State with A and B Connected	The Speech State applied on presentation of a call where both parties are attached and in a two-way speech path.
Disable Listen Both function?	Defines whether to disable the "Listen Both" function.
Speech State on Outbound call Answer	The Speech State applied when an outbound call is answered.
Disable Mute function?	Defines whether to disable the mute function.
Speech State applied to Call when Parked	The Speech State applied when a call is Parked.
Disable Hold function?	Defines whether to disable the Hold function.
Record—Audio Record	

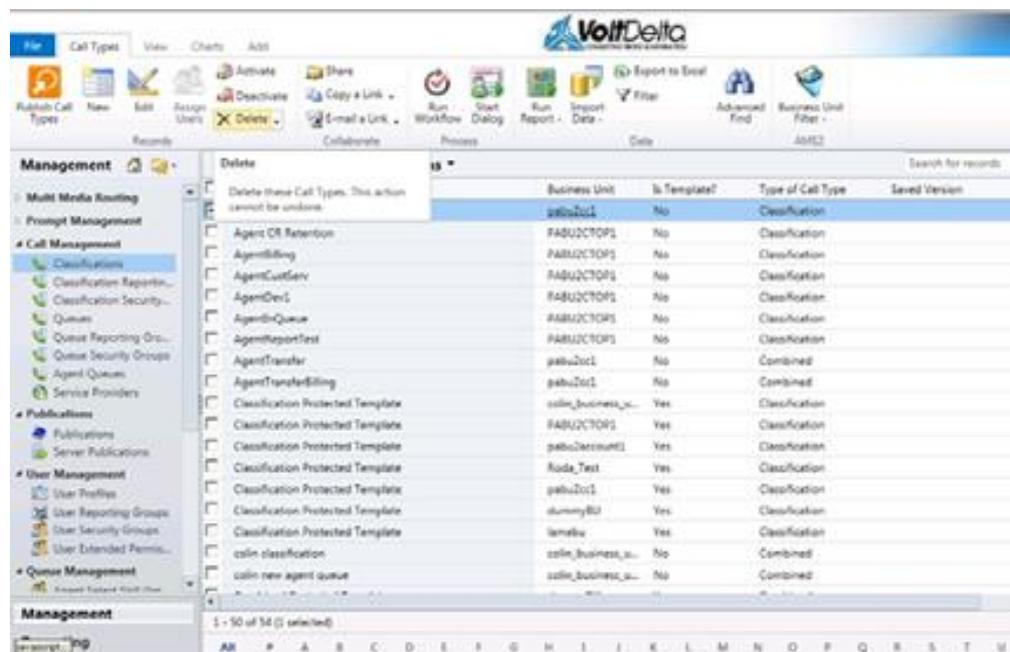
Field	Description
Audio Recording Mode	The type of call recording to be used for calls, Among the choices are the following: <ul style="list-style-type: none"> • Call Presentation and Delivery—For inbound calls, records IVR (Delivery) and agent (Presentation) audio. Does not record while call is in queue. • Call Completion Setup and Delivery—For recording call completion and delivery of outbound calls
Audio Recording Percentage	Percentage of calls to be audio recorded, when recording is enabled.
Record— Screen Record	
Screen Recording Percentage	Percentage of calls to be screen recorded, when recording is enabled.
Workstation—Display	
Called Party Number (DNIS)	The called party number (DNIS) value to display for this call.
Enable Contact Tracking for Voice Calls in Dynamics CRM?	Allows phone call activity tracking in Dynamic CRM. Must be set to No for non-voice call Classifications. The CLI must be available for tracking to occur.
Call Arrival Tab	Name of the workstation tab to be opened on call arrival.
Call Arrival Web Page	Web page URL displayed at the workstation on call arrival
Enable Blind Transfer?	If this field is set to Yes, the Connect A-B/Transfer feature is allowed for calls in the Ringing state. If set to No, a call must be connected before it can be transferred.

3.4.3 Deleting a Classification

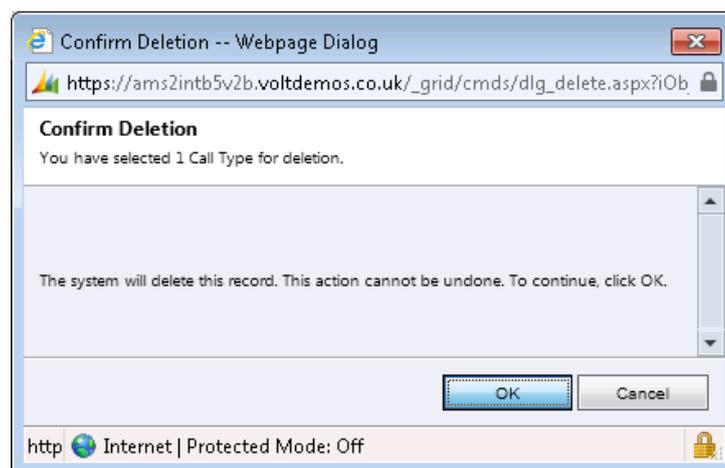
When a Classification is deleted, it is automatically unpublished from the system. For details on publishing, refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#).

To delete a Classification, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Classifications**.
- 2 Select the record to delete, then click **Delete**.



- 5 A confirmation dialog is displayed:



- 6 Click **OK** to confirm deletion

3.5 Working with Combined Call Types (Classification and Queue)

Certain services require the creation of a Call Type that is both a Classification and a Queue. A Combined Call Type allowing a Call Type

record to act as both a Queue and Classification. For example, Outbound services require this Combined Call Type.

This chapter contains the following topics:

- Creating a Combined Call Type
- Editing a Combined Call Type
- Enabling Outbound Services

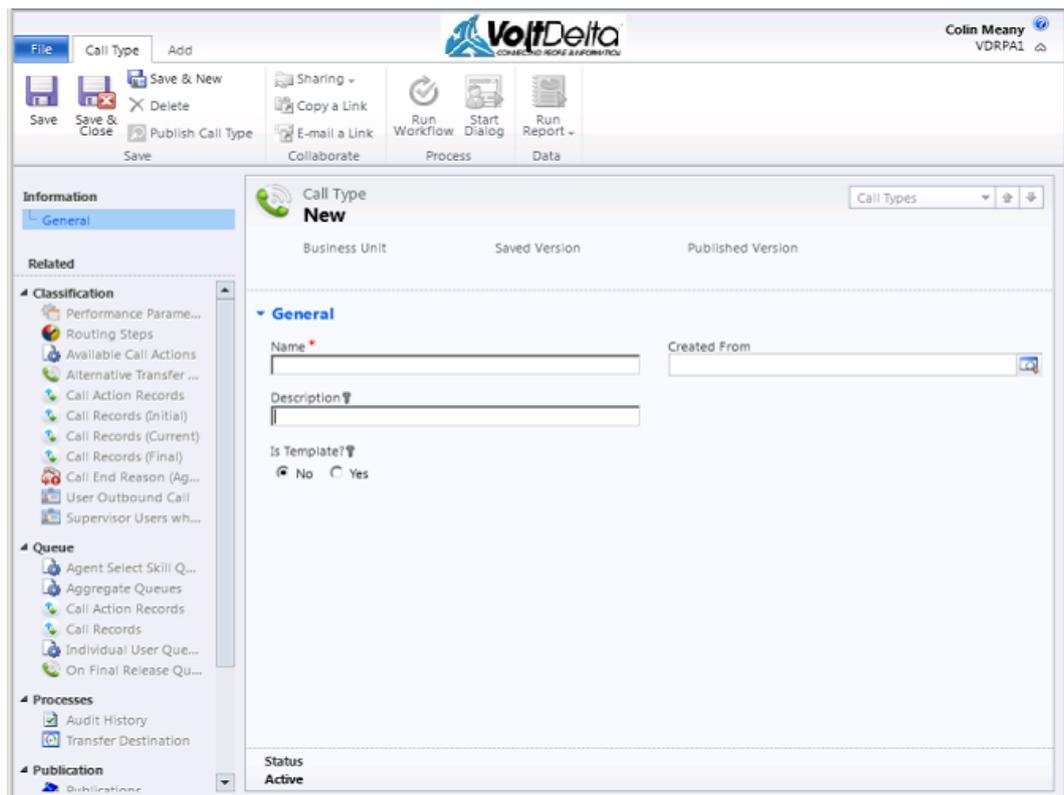
3.5.1 Creating a Combined Call Type

Creating a Combined Call Type is very similar to creating a Queue or Classification – see chapter 3.3.1, [Creating a Queue](#) or chapter 3.4.1 [Creating a Classification](#).

To create a Combined Call Type, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Classifications** or **Queues**.
- 2 Click **New** in the ribbon.

The dialog to create a Queue (or Classification) is displayed.



The screenshot shows the 'New Call Type' dialog in the VoltDelta Management Portal. The dialog is titled 'Call Type New' and has a 'Call Types' dropdown menu. The 'General' tab is selected, showing fields for 'Name', 'Description', and 'Is Template?' (with radio buttons for 'No' and 'Yes'). The 'Status' is set to 'Active'. The ribbon includes options like 'Save', 'Delete', 'Publish Call Type', 'Run Workflow', 'Start Dialog', and 'Run Report'. The left sidebar shows a navigation pane with categories like 'Classification', 'Queue', 'Processes', and 'Publication'.

- 3 In the Name field, enter a name for the combined call type

- 4 Click the button next to the Created From field to select a template. The Look Up Record dialog is displayed.

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Show Only My Records

View:

Search:

	Name ▲	Business Unit ▲	Is Template?	Save
<input type="checkbox"/>	Classification Protected Template	PABU2CTOP1	Yes	▲
<input type="checkbox"/>	Classification Protected Template	Roda_Test	Yes	
<input type="checkbox"/>	colin classification	colin_business_ur	No	
<input type="checkbox"/>	colin new agent queue	colin_business_ur	No	
<input type="checkbox"/>	Combined Protected Template	colin_business_ur	Yes	
<input type="checkbox"/>	Combined Protected Template	dummyBU	Yes	
<input type="checkbox"/>	Combined Protected Template	pabu2account1	Yes	
<input type="checkbox"/>	Combined Protected Template	pabu2cc1	Yes	
<input checked="" type="checkbox"/>	Combined Protected Template	PABU2CTOP1	Yes	
<input type="checkbox"/>	Combined Protected Template	Roda_Test	Yes	
<input type="checkbox"/>	Cust Serv	pabu2cc1	No	
<input type="checkbox"/>	Cust Serv Billing	pabu2cc1	No	

1 - 50 of 86 (1 selected) Page 1

Properties New

OK Cancel Remove Value



Combined Call Types must always be created from a template for the required Business Unit.



If templates from multiple Business Units appear (depending on your user permissions) then click the **Business Units** column header to sort the list by Business Unit name. This will make it easier to find your required template.

- 5 Select the **Combined Protected Template** for your required Business Unit, then click **OK**.

You are returned to the Classification or Queue dialog.

6 Click **Save**.

All the properties for the Queue (or Classification) now appear in the dialog.

The screenshot shows the VolfDelta software interface for configuring a Call Type. The main window is titled 'myCombinedCT' and is divided into several sections:

- General:**
 - Name: myCombinedCT
 - Type: Classification, Queue
 - Created From: Combined Protected Template
 - Description: (empty)
 - Is Template?: No (selected)
- Attributes:**
 - Tenant Hierarchy: RochesterPA\VDRPA1\VDRPA1\PABU2\CTOP1
 - Tenant Hierarchy ID: HST\022\024
 - System Name: RochesterPA
- Security Groups:**
 - Classification Security Group: (empty)
- Status:** Active



Since it is both a Classification and Queue, a Combined Call Type appears under both Queues and Classifications, and the relevant settings for the Combined Call Type are displayed depending on whether you are viewing Classifications or Queues.



Use the items under Information at the top of the navigation bar to jump to different groups of properties in the dialog.

7 Click **Save & Close** to close the dialog with all the properties set to their default values.



For details about creating a Combined Call Type to handle outbound services, refer to 3.5.3, [Enabling Outbound Services](#)

3.5.2 Editing a Combined Call Type

To edit a Combined Call Type, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Classifications or Queues**.

The Active Classifications or Active Queues dialog is displayed

- 2 Select the record to edit, and then click **Edit**

The dialog is displayed for the Combined Call Type.

The screenshot shows the 'Edit Call Type' dialog in the VoltDelta Management Portal. The dialog is titled 'Call Type myCombinedCT' and is set to 'Call Types'. The 'General' tab is active, showing the following fields:

- Name:** myCombinedCT
- Created From:** Combined Protected Template
- Type:** Classification - Queue
- Description:** (empty)
- Is Template?:** No (selected)
- Attributes:**
 - Tenant Hierarchy:** RochesterPA\WDRPA1\WDRPA1\PABU2\PABU2CTOP1
 - Tenant Hierarchy ID:** HST022\024
 - System Name:** RochesterPA
 - Security Groups:** Classification Security Group
- Status:** Active

The left navigation pane shows 'Classification' and 'Queue' sections. The top toolbar includes options like 'Save', 'Publish Call Type', 'Share', 'Run Workflow', 'Start Dialog', and 'Run Report'.

- 3 Edit the fields as required, and then click **Save**.

The table following describes the parameters unique to the Combined Call Type dialog; for the remainder of the fields, refer to the tables in chapter 3.3.2, [Editing a Queue](#) and chapter 3.4.2, [Editing a Classification](#).

- 4 Then Publish the Combined Call Type, as described in chapter 3.8., [Publishing an Item \(Classification, Queue or Combined Call Type\)](#)

Field	Description
General	
Name	The name of the Combined Call Type. The value must be unique within the Business Unit.
Created From	Displays the name of the template or existing Classification from which this record was created.
Type	Identifies this entity as a Combined Call Type by displaying “Classification” and “Queue.”
Description	A description for the Combined Call Types.
Is Template?	Defines whether this record is a template.
Attribute—Attributes	
Tenant Hierarchy	The fully qualified name hierarchy for the Tenant\Business Unit that owns the Combined Call Type.
Tenant Hierarchy ID	The fully qualified Tenant Hierarchy ID for the Tenant\Business Unit that owns the Combined Call Type.
System Name	The System Name as defined in the Properties of the Organization to which the Business Unit belongs.

3.5.3 Enabling Outbound Services



If you are creating a Classification for outbound services, note that Classifications created for outbound services must always be Combined Call Types.

For Combined Call types used for outbound services, to prepare the Agent for the next operation, the underlying call must be cleared automatically by the system when the called party hangs up or when the Agent releases the A-party.

To ensure that this automatic call-clearing processing occurs, proceed as follows:



Specific agent workstation functions such as Call Wrap-up in mandatory mode might need to have this set to “No.” In such cases, the Agent would have to enter a wrap-up information at the workstation between the “Clear the Party” and “Release the Call” phases.

- 1 Display the Combined Call Type for which you want to enable outbound service, as described in Chapter 3.5.2, [Editing a Combined Call Type](#).
- 2 In the left Information pane, select **Computer Telephony Integration → Call Handling**.
- 3 Set the *Release Call when Parties clear?* field to **Yes**



- 4 Click **Save & Close** to save the settings and close the dialog
- 5 Publish the Combined Call Type. Refer to chapter 3.8., [Publishing an Item \(Classification, Queue or Combined Call Type\)](#)

3.6 Assigning Service Announcement Profiles to Classifications or Queues

A published Service Announcement Profile can be assigned to one or more Classifications or Queues. This chapter shows how to assign a Service Announcement Profile to a Classification. The steps are the same for assigning a Service Announcement Profile to a Queue.

For information about Service Announcement Profiles, refer to chapter 10.8, [Working With Service Announcement Profiles](#).

To assign a Service Announcement Profile to a Classification, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management → Classifications..**

- 2 Click the desired Classification name in the list of Classifications that appears

The Classification dialog is displayed.

- 3 At the top of the Management Portal navigation pane under Information, click **Announcements**:

- 4 Click the button next to the Service Announcement Profile field and select the required Service Announcement Profile.
- 5 The Classification (or Queue) must be published in order for your changes to take effect. Since the Service Announcement Profile must also be published for this to work, it is recommended that the Service Announcement Profile be published first. The recommended sequence is as follows:
 - a. Publish Announcements, as described in chapter 10.7, [Publishing an Announcement](#).
 - b. Publish Service Announcement Profiles as described in chapter 10.8.2, [Publishing Service Announcement Profiles](#).
 - c. Publish Classifications and Queues as described in chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#)



When both the current Classification and Queue have a Service Announcement Profile specified, only the Service Profile in the Classification is used..

3.7 Activating and Deactivating Items (Queues, Classifications and Combined Call Types)

This chapter contains the following topics:

- Deactivating Items
- Activating Items

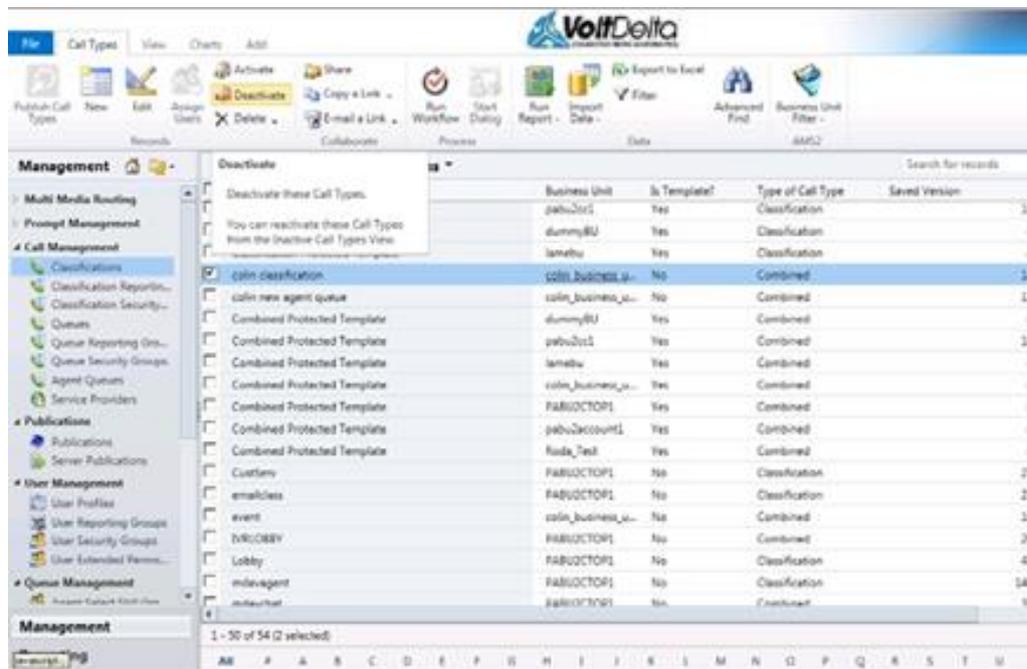
3.7.1 Deactivating Items

When a Queue, Classification, or Combined Call Type is deactivated, it is automatically unpublished from the system. It is republished to the system when activated. For details on publishing, refer to chapter 3.8, [Publishing an Item \(Classification, Queue or Combined Call Type\)](#).

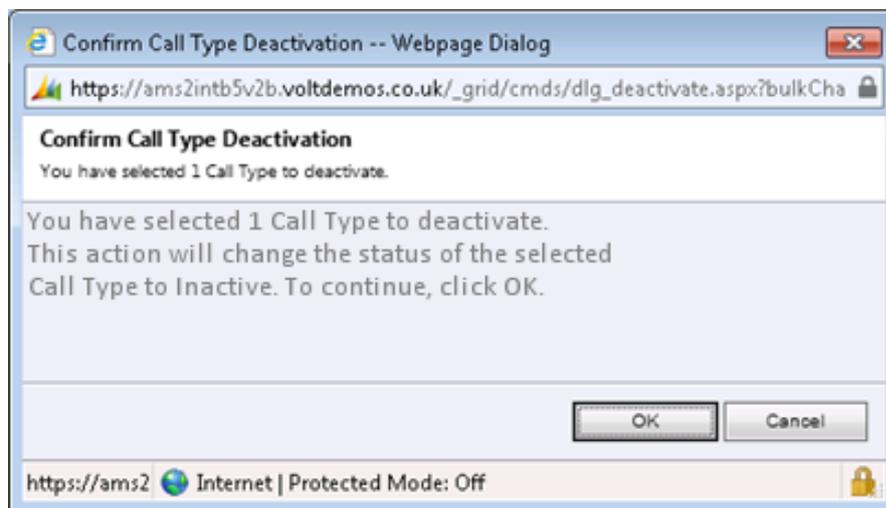
To deactivate an item, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Queues** or **Classifications**. (A Combined Call Type will display for either selection..)

- 2 Select the record to deactivate and then click **Deactivate**.



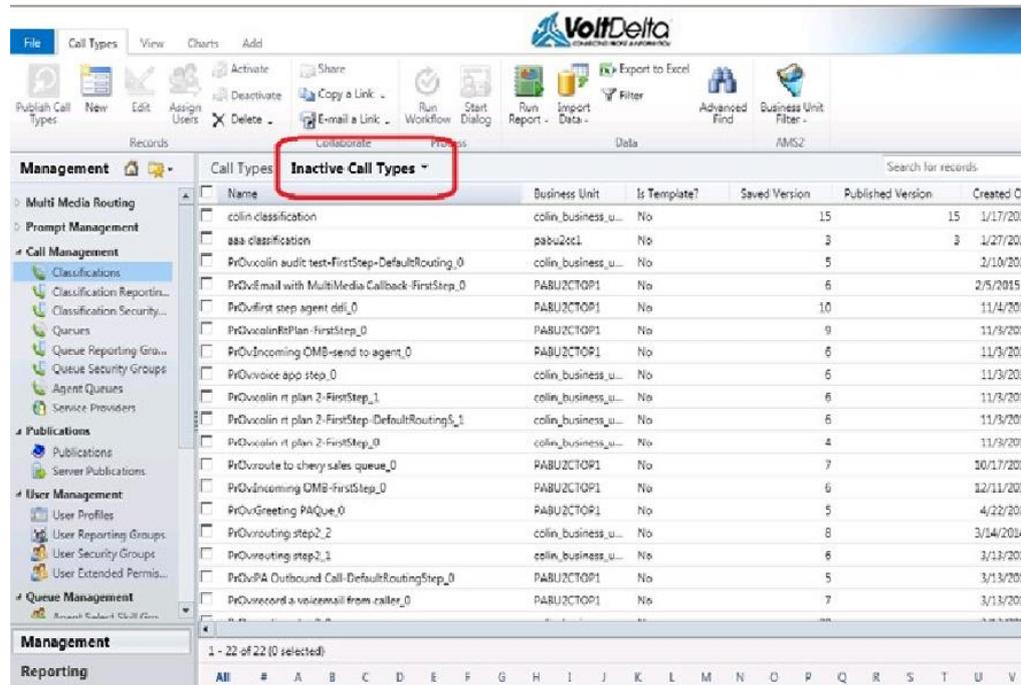
- 3 A confirmation dialog is displayed:



- 4 Click **OK** to confirm deactivation of the item

- 5 To verify that the item is deactivated, select **Inactive Call Type** from the Call Types selection menu

The deactivated item appears in the list



3.7.2 Activating Items

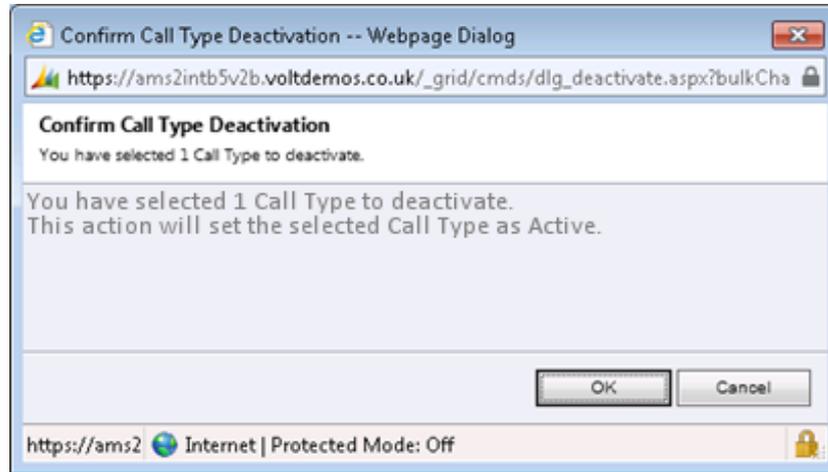
When a Queue, Classification, or Combined Call Type is deactivated, it is automatically unpublished from the system. It is republished to the system when activated. For details on publishing, refer to, refer to chapter 3.8., [Publishing an Item \(Classification, Queue or Combined Call Type\)](#).

To Activate an item, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Queues or Classifications**. (A Combined Call Type will display for either selection.)
- 2 Select the **Inactive Call Types** view from the Call Types menu
A list of all Inactive records is displayed

- 3 Select the record to activate and then click **Activate**.

A confirmation dialog is displayed:



- 5 Click **OK** to confirm activation of the item
- 6 To verify the activation of the item, select **Active Queues** or **Active Classifications** from the Call Type menu

3.8 Publishing an Item (Classification, Queue or Combined Call Type)

A Classification, Queue, or Combined Call Type “Item” must be published (downloaded) into the system to be available to be used. An item must also be published if it has been modified

To publish an item, proceed as follows:

- 1 Ensure that you have published all Service Announcement Profiles that are referenced by the Classification or Queue before beginning the publishing process. Refer to chapter 10.8.2, [Publishing Service Announcement Profiles](#).
- 2 In the respective view select **Call Management** → **Classification** or **Queue**.

- 4 Optionally, enter the following information:
 - Schedule Now—This field allows you to specify a time at which the item will be published. By default, Schedule Now is selected so that the item is published when you click **OK**.
 - Activate Now—This field allows you to specify a time at which the item will be activated on the target server. This capability is useful for grouping multiple changes to take effect at the same time. For example, changes can be made to multiple items, and then all changes can be activated together at midnight. By default, Activate Now is selected so that the item is activated when you click **OK**
- 5 In the Comments field, enter a comment describing the reason for publishing.
- 6 Click **OK** to publish the Item.

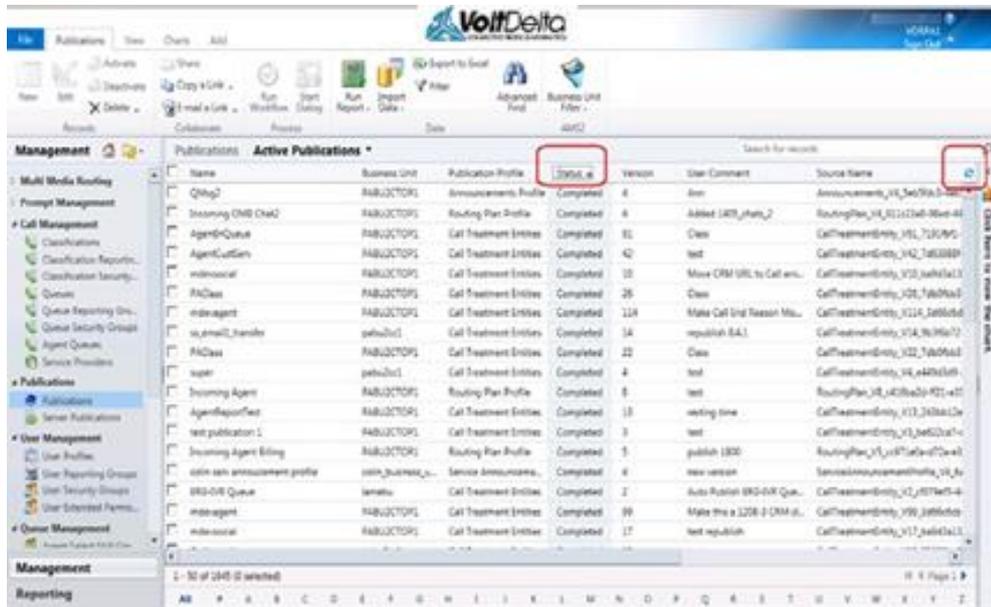
3.8.2 Checking the Status of a Publication

You can check the status of a publication by displaying the Publications view.

To display the Publications view, proceed as follows:

1 In the Management Portal navigation pane, select **Publications** → **Publications**

The Active Publications dialog is displayed.



By default this view is sorted in order of the time at which the publication was requested, so new publications will appear at the top.



To find a publication, enter the name of the item that you published (e.g. a queue) in the search box. Alternatively, you can enter the comment you supplied in the Publish dialog. This is a good way of finding multiple related publications.

The Status column indicates the current status of the Publication. You can update the status by clicking the green double arrow "refresh" icon  (circled above at right).

The following are possible status values:

Status	Meaning
Pending	The data has not yet been downloaded to the appropriate server(s).
Downloaded	The data has been downloaded to all the appropriate server(s) but has not yet been processed. This is the final status for media prompts.

4 Sharing Entities

4.1 Overview

This chapter contains the following chapters:

- About Sharing
- Sharing an Entity

4.2 About Sharing

By default, Management Portal entities such as Security Groups, Reporting Groups, Queues, Classifications, and so on, are not shared when they are created. This means that only administrative users within the Business Unit can access and use the entity. After an entity is created, an administrator can share the entity to make it available to selected Users and Business Units (called teams). When an entity is shared, the administrator also defines the permissions (such as Read, Write, Append, and so on) for the Users and Businesses Units.

Examples of sharing can include the following:

- Security Groups—A parent Business Unit can share a Security Group such as a Queue Security Group with one or more of its child Business Units. The child Business Units can then access the Queues according to their needs.
- Reporting Groups—A parent Business Unit can share a Reporting Group such as a User Reporting Group with one or more Users. These Users can then generate historical and dynamic reports using data from the shared User Reporting Group.

4.3 Sharing an Entity

The procedure for sharing is similar, regardless of the type of entity being shared.



You must be logged on as a parent Business Unit administrator to be able to share records with child Business Units.

To share an Entity, proceed as follows.

- 1 Display the item that you want to share. For example, to share a Queue Security Group, in the Management Portal navigation pane, select **Call Management** → **Queue Security Groups**
- 2 Click the check box next to the item(s) you want to share.

- 3 Click **Share** in the ribbon
- 4 In the dialog that is displayed, in the left pane, click **Common Tasks** → **Add User/Team**.

The Look Up Records dialog is displayed

Look Up Records
Select the type of record you want to find and enter your search criteria. Filter your results and view different columns of data by using the View options. Repeat this process for different types of records.

Look for: User
View: User Lookup View
Search: Search for records

<input type="checkbox"/>	Full Name ▲	User Name	Business Unit	Site
<input type="checkbox"/>	Gerry Trenkler	gerryt@pabu2cc1	pabu2cc1	
<input type="checkbox"/>	Gerry Trenklertimezone	gerrytimezone@PABU2CT...	PABU2CTOP1	
<input type="checkbox"/>	Host Support test	test_HS@PABU2CTOP1	PABU2CTOP1	
<input checked="" type="checkbox"/>	Host Support test	test_Host Support@PABU...	PABU2CTOP1	
<input type="checkbox"/>	Parry Kankariya	parryk@PABU2CTOP1	PABU2CTOP1	
<input type="checkbox"/>	report user	report@PABU2CTOP1	PABU2CTOP1	
<input type="checkbox"/>	report userpabu2cc1	reportuser@PABU2CTOP1	PABU2CTOP1	

1 - 37 of 37 (1 selected) Page 1

Selected records:

Add Remove

Host Support test

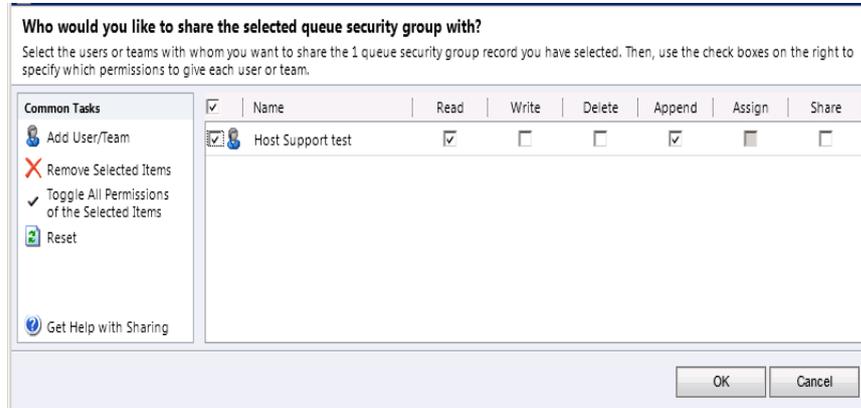
Properties New

OK Cancel

- 5 In the Look For field, do one of the following::
 - To share at the Business Unit level, change the selection to **Team**
 - To share with one or more individual users, leave the selection as **User**
- 6 Select the Business Unit(s) or User(s) with which the record will be shared, then click **OK**

You are returned to the dialog where you can assign permission levels

- 7 Select the desired sharing permissions for each selected child Business Unit or individual user.



- 8 Click **OK**.

5 Reporting Groups

5.1 Overview

This chapter provides information on the following topics:

- User Reporting Groups
- Queue Reporting Groups
- Classification Reporting Groups

5.2 User Reporting Groups

User Reporting Groups are used to aggregate User Profiles for dynamic and historical reporting purposes.

Note the following about User Reporting Groups:

- User Reporting Groups are used to aggregate User Profiles for reporting purposes (dynamic or historic). User Reporting Groups can be defined for all types (Agents and Administrators) of users.
- User Profiles can belong to more than one User Reporting Group.
- A User Reporting Group can contain only Agent User Profiles from the same Business Unit to which the group belongs.

User Reporting Groups are typically shared on the Management Portal, allowing Users to be given access to the groups and members of the groups. For example, a parent Business Unit can share such a group with one or more of its child Business Units. The children can then access the User Profiles according to their needs.

The administration of User Reporting Groups includes the following tasks:

- Creating a User Reporting Group
- Assigning a User to a User Reporting Group

5.2.1 Creating a User Reporting Group

To create a User Reporting Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management → User Reporting Groups**.

2 Click **New** in the ribbon.

The Create User Reporting Group dialog is displayed.

The screenshot shows the 'User Reporting Group' dialog box. The ribbon at the top includes 'File', 'Save & New', 'Sharing', 'Copy a Link', 'E-mail a Link', 'Collaborate', 'Run Workflow', 'Start Dialog', 'Run Report', and 'Data'. The 'Information' pane on the left shows 'General' selected under 'Related' and 'Common' items like 'Audit History', 'Performance Parameter', 'User Reporting Groups', and 'User Profiles'. The main area is titled 'User Reporting Group' and 'New'. It has a 'General' section with 'Name' and 'Business Unit' fields. Below is an 'Associations' section with a 'Parent User Reporting Group' field. There are two empty tables with headers: 'Name | Business Unit | Created On' and 'Username | First Name | Last Name | Name (User Security Group) | Business'. The status is 'Active'.

3 In the Name field, enter a name for the new User Reporting Group. When specifying a name, do not enter the apostrophe character (').



The maximum allowed name length is 25 characters.

- 4** In the Business Unit field, Select the Business Unit for the new user Reporting Group.
- 5** Optionally, you may select the Parent User Reporting Group.



The new Reporting Group that you are creating will thereby become a child entity of this Parent User Reporting Group, and users of the Parent Reporting Group will be able to access the new Reporting Group

Name	Business Unit	Parent User Reporting Group	Created On
Lobby User	pabu2cc1		11/19/2013 9:55...
Mdev User	pabu2cc1		4/15/2014 12:18...
PA Load Test	pabu2cc1		10/10/2013 3:53...
PA OMB User	pabu2cc1		4/22/2014 4:11 ...
PA User	pabu2cc1		10/7/2013 9:57 ...
Report User	pabu2cc1		10/7/2013 9:55 ...
test 4 Tenant Team Leader	pabu2cc1		2/17/2014 12:32...
test_URG	PABU2CTOP1		3/3/2014 3:35 PM

- 6 Optionally, click the **Child User Reporting Groups** table to enable the Add New User Reporting Group and Add Existing User Reporting Group buttons in the ribbon



Use these buttons to include child Reporting Groups under the new User Reporting Group you are creating. Users who belong to the new Reporting Group will have access to these child Reporting Groups.

- 7 Click **Save & Close** in the ribbon to save the new User Reporting Group and close the dialog.
- 8 Continue by assigning Users to the new User Reporting Group, as described in chapter 5.2.2, Assigning a User to a User Reporting Group

5.2.2 Assigning a User to a User Reporting Group

Assign Users to a User Reporting Group by doing either of the following:

- Assigning Through the User Profile
- Assigning Through the User Reporting Group

5.2.2.1 Assigning Through the User Profile

To assign a user to a User Reporting Group through the User Profile, do the following:

- 1 In the Management Portal navigation pane, **User Management** → **User Profiles**

The Active User Profiles view is displayed.

- 2 Select the user profile you want to assign to a User Reporting Group.
- 3 Click **Edit** in the ribbon.

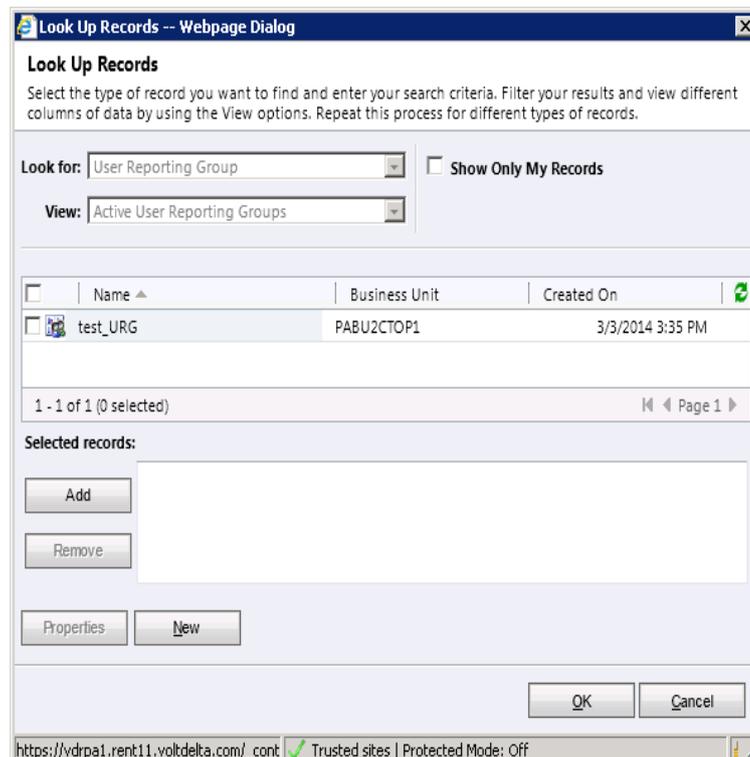
The User Profile editing dialog appears.

- 4 Click on the **Reporting Groups** table to activate it.



- 5 Click **Add Existing User Reporting Group** menu in the ribbon.

A Look Up Records dialog appears, showing a list of User Reporting Groups.



- 6 Select the User Reporting Group to which you wish to assign the user, then click **Add**.

The User Reporting Group is added to the Selected Records area

- Click **OK** to assign the User Reporting Group to the user.

The Reporting Groups table now contains the assigned User Reporting Group

Name	Business Unit	Parent User Reporting Group	Created On
test_URG	PABU2CTOP1		3/3/2014 3:35 PM

5.2.2.2 Assigning Through the User Reporting Group

To assign one or more users to a User Reporting Group through the User Reporting Group, do the following:

- In the Management Portal navigation pane, **User Management** → **User Reporting Groups**.

The list of User Reporting Groups is displayed

- Select the User Reporting Group you wish to assign to a User.
- Click **Edit** in the ribbon.

The User Reporting Group editing dialog is displayed.

- Click the User Profiles table .

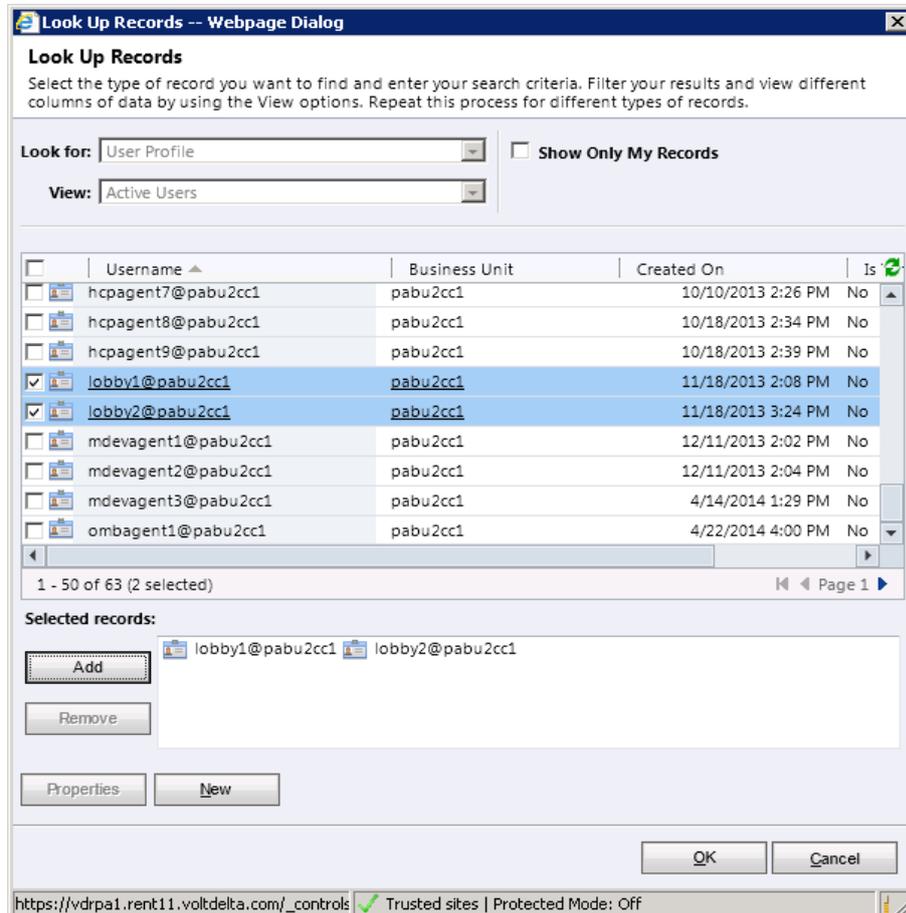
Username	First Name	Last Name	Name (User Security Group)	Business U
agentc@cca.demo.com	Agent	C	Team A	DemoContact
agentd@cca.demo.com	Agent	D	Team A	DemoContact
agente@cca.demo.com	Agent	E	Team A	DemoContact
agentf@cca.demo.com	Agent	F	Team A	DemoContact

- Click **Add Existing User Profile** in the ribbon.

The Look Up Record dialog appears with a list of User Profiles.

- 6 Select the User Profile(s) you wish to assign to the User Reporting Group, then click **Add**.

The User Profile is added to the Selected Records area



- 7 Click **OK** to assign the User Profile(s) to the User Reporting Group.

The Users Under Current Reporting Group table now contains the assigned User Profile

5.3 Queue Reporting Groups

Queue Reporting Groups are used to aggregate Queues for dynamic and historical reporting purposes. For example, you could create a group of agents that belong to the Customer Service Queue. This group can then be shared with the Customer Service Team leads. Only the Customer Service Team Leads that were shared are able to view the reports

Queues can belong to more than one Queue Reporting Group. A Queue Reporting Group can contain only Queues from the same Business Unit to which the group belongs.

These groups are typically shared on the Management Portal.

Sharing allows Users to be given access to the groups and members of the groups. For details, refer to chapter 4, [Sharing Entities](#).

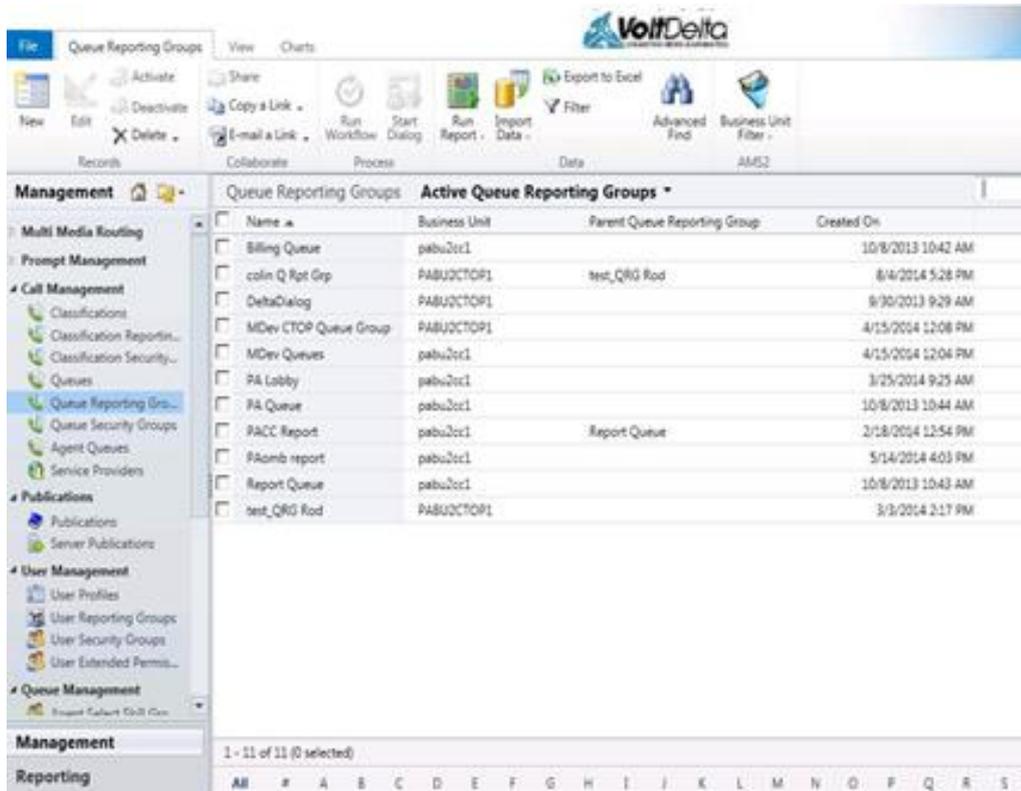
This chapter includes the following procedures for managing Queue Reporting Groups:

- Creating a User Reporting Group
- Assigning a User to a User Reporting Group

5.3.1 Creating a Queue Reporting Group

To create a Queue Reporting Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Queue Reporting Groups**.



- 2 Click **New** in the ribbon.

The New Queue Reporting Group dialog is displayed.

The screenshot shows the VoltDelta web application interface for creating a new Queue Reporting Group. The top navigation bar includes the VoltDelta logo and the user name 'Colin Meany' with the ID 'VDRPA1'. Below the navigation bar is a ribbon menu with tabs for 'File', 'Collaborate', 'Process', and 'Data'. The 'File' tab is active, showing options like 'Save', 'Save & Close', 'Delete', 'Save & New', 'Sharing -', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report -'. The main content area is titled 'Queue Reporting Group' and 'New'. It features a left-hand navigation pane with 'Information' and 'Related' sections. The 'General' section is expanded, showing fields for 'Name' and 'Business Unit'. Below these is an 'Associations' section with a 'Parent Queue Reporting Group' dropdown. A table below the associations section is currently empty, with a message 'To enable this content, save the record.' and a status bar showing '0 - 0 of 0 (0 selected)'. At the bottom, the status is 'Active'.

Information

- General

Related

- Common
 - Performance Parameter
 - Dashboard Agents
- Processes
 - Audit History

Queue Reporting Group

New

General

Name * Business Unit *

Associations

Parent Queue Reporting Group

Name	Business Unit	Parent Queue Reporting Group	Created On
To enable this content, save the record.			

0 - 0 of 0 (0 selected) Page 1

Name	Business Unit	Saved Version	Published Version	Created On
------	---------------	---------------	-------------------	------------

Status **Active**

- 3 In the Name field, enter the name of the new Queue Reporting Group,

- 4 Click the button next to the Business Unit field.

The Look Up Record dialog is displayed.

Look Up Record
Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Business Unit
View: Business Units Lookup View
Search: []

Name	Domain Name	Business Unit Role	
colin_business_unit	colin.com	Contact Center (In Sou	PA
dummyBU	eee	Account	PA
pabu2account1	pabu2account1	Account	PA
pabu2cc1	pabu2cc1	Contact Center (Out Sc	PA
PABU2CTOP1	PABU2CTOP1	Contact Operation	PA
Roda_Test	Roda_Test	Contact Center (In Sou	PA

1 - 6 of 6 (0 selected) Page 1

Properties New OK Cancel Remove Value

https://vdrpa1.rent11.voldelta.com/_controls Trusted sites | Protected Mode: Off



Enter the first few letters of the Business Unit name in the Search field and click the Search button to find your Business Unit.

- 5 Select your Business Unit and click **OK**.
You are returned to the Queue Reporting Group dialog.
- 6 Optionally, select the Parent Queue Reporting Group. The new Queue Reporting Group that you are creating will thereby become a child entity of this Parent Queue Reporting Group, and users of the Parent Queue Reporting Group will be able to access the new Queue Reporting Group. .
- 7 Optionally, click **Save** to enable the Child Queue Reporting Groups table. Click the table to enable the Add New Queue Reporting Group and Add Existing Queue Reporting Group buttons in the ribbon. Use these buttons to include child Queue Reporting Groups under the new Queue Reporting Group you are creating. Users who belong to the new Queue Reporting Group will have access to these child Reporting Groups.

- 8 Click **Save & Close** to confirm your input and save the new Queue Reporting Group.

5.3.2 Assigning a Queue to a Queue Reporting Group

To assign a Queue to a Queue Reporting Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management → Queue Reporting Groups**.
- 2 Click the Queue Reporting Group to which you want to assign one or more Queues.

The Queue Reporting Group dialog appears for the selected group.

The screenshot shows the VolfDelta Queue Reporting Group dialog for a group named 'PA Queue'. The ribbon includes options like 'Save & Close', 'Deactivate', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'General' section contains fields for 'Name' (PA Queue) and 'Business Unit' (pabu2cc1). Below this is an 'Associations' section with a 'Parent Queue Reporting Group' field. Two data tables are visible: 'Child Queue Reporting Groups' (Active Child Queue Reporting Group) and 'Queues' (Active Queues Non-Template). The 'Queues' table lists 'Cust Serv' and 'Cust Serv Tracker' with their respective business units, saved and published versions, and creation dates.

Child Queue Reporting Groups: Active Child Queue Reporting Group	Name	Business Unit	Parent Queue Reporting Group	Created On
No Queue Reporting Group records are available in this view.				

Queues: Active Queues Non-Template	Name	Business Unit	Saved Version	Published Version	Created On
<input type="checkbox"/>	Cust Serv	pabu2cc1	16	16	9/19/2013 2:41
<input type="checkbox"/>	Cust Serv Tracker	pabu2cc1	31	31	2/18/2014 4:57

Status: Active

- 3 Click the section labelled **Queues**.
A new set of controls appears in the ribbon.
- 4 Click **Add Existing Call Type** in the ribbon.
The Look Up Records dialog is displayed

- 5 Click the name of the desired Queue (Call Type) in the list to add it to the Selected Records area of the dialog.



To select multiple Queues, click the check boxes associated with the desired Queues, and then click **Add**.

- 6 Click **OK** to confirm your selection and return to the previous dialog.
The selected Queue(s) should now appear in the Queues section.
- 7 Click anywhere outside the Queues section to restore the ribbon selections, and then click **Save & Close** to confirm your input.

5.4 Classification Reporting Groups

Classification Reporting Groups are used to aggregate Classifications for dynamic and historical reporting purposes.

These groups are typically shared on the Management Portal, allowing Users to be given access to the groups and members of the groups. For example, a parent Business Unit can share such a group with one or more of its child Business Units. The child Business Unit can then access the Classifications as required.

Note the following about Classification Reporting Groups:

- Classifications can belong to more than one Classification Reporting Group.
- A Classification Reporting Group can contain only Classifications from the same Business Unit to which the group belongs.

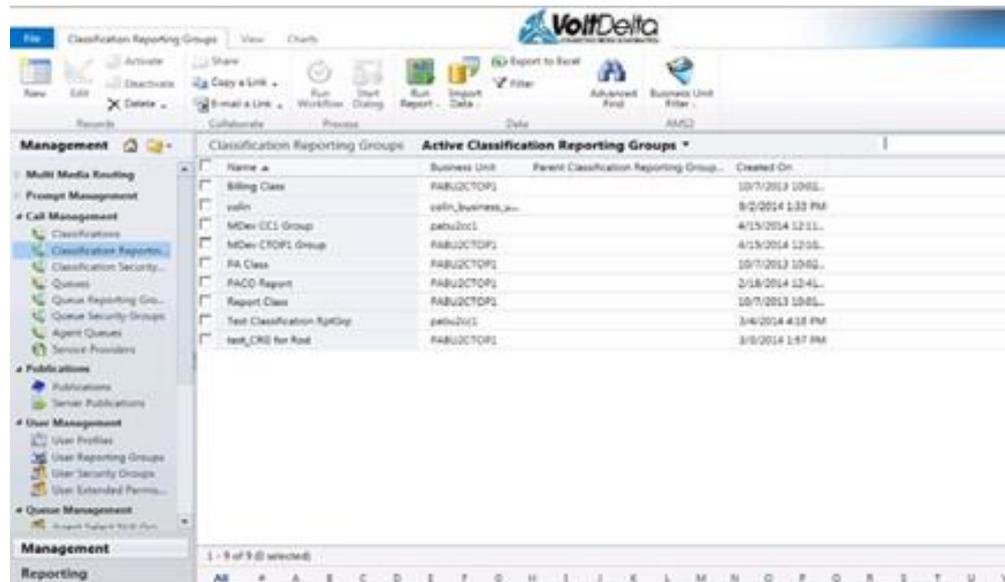
This chapter includes the following procedures for managing Classification Reporting Groups:

- Creating a Classification Reporting Group
- Assigning a Classification to a Classification Reporting Group

5.4.1 Creating a Classification Reporting Group

To create a Classification Reporting Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Classification Reporting**.



- 2 Click **New** in the ribbon.

The New Classification Reporting Group dialog is displayed.

The screenshot displays the VoltDelta web application interface for creating a new 'Classification Reporting Group'. The top navigation bar includes the VoltDelta logo and the user name 'Colin Meany VDRPA1'. A ribbon menu at the top provides options such as 'Save', 'Save & Close', 'Delete', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The left sidebar shows the 'Information' section with 'General' selected, and a 'Processes' section with 'Audit History' listed. The main content area is titled 'Classification Reporting Group New' and contains the following fields:

- General**
 - Name ***: A text input field.
 - Business Unit ***: A dropdown menu.
- Associations**
 - Parent Call Type Reporting Group**: A dropdown menu.

Below the form fields are two data tables. The first table has columns for 'Name', 'Business Unit', and 'Created On'. It is currently empty and contains the message: 'To enable this content, save the record.' Below the table is a status bar showing '0 - 0 of 0 (0 selected)' and 'Page 1'. The second table has columns for 'Name', 'Business Unit', 'Saved Version', 'Published Version', and 'Created On'. It is also empty. At the bottom of the form, the 'Status' is set to 'Active'.

- 3 In the Name field, enter the name of the new group,

4 Click the button next to the Business Unit field.

The Look Up Record dialog is displayed.

Name	Domain Name	Main
colin_business_unit	colin.com	
dummyBU	eee	
pabu2account1	pabu2account1	
pabu2cc1	pabu2cc1	
PABU2CTOP1	PABU2CTOP1	
Roda_Test	Roda_Test	



Enter the first few letters of the Business Unit name in the Search field and click the Search button to find your Business Unit.

5 Select your Business Unit and click **OK**.

You are returned to the Classification Reporting Group dialog.

6 Optionally, select the Parent Call Type Reporting Group. The new Call Type Reporting Group that you are creating will thereby become a child entity of this Parent Call Type Reporting Group, and users of the Parent Call Type Reporting Group will be able to access the new Call Type Reporting Group.

7 Optionally, click **Save** to enable the Child Call Type Reporting Groups table. Click the table to enable the Add New Classification Reporting Group and Add Existing Classification Reporting Group buttons in the ribbon. Use these buttons to include child Classification Reporting Groups under the new Classification Reporting Group you are creating. Users who belong to the new

Classification Reporting Group will have access to these child Reporting Groups.

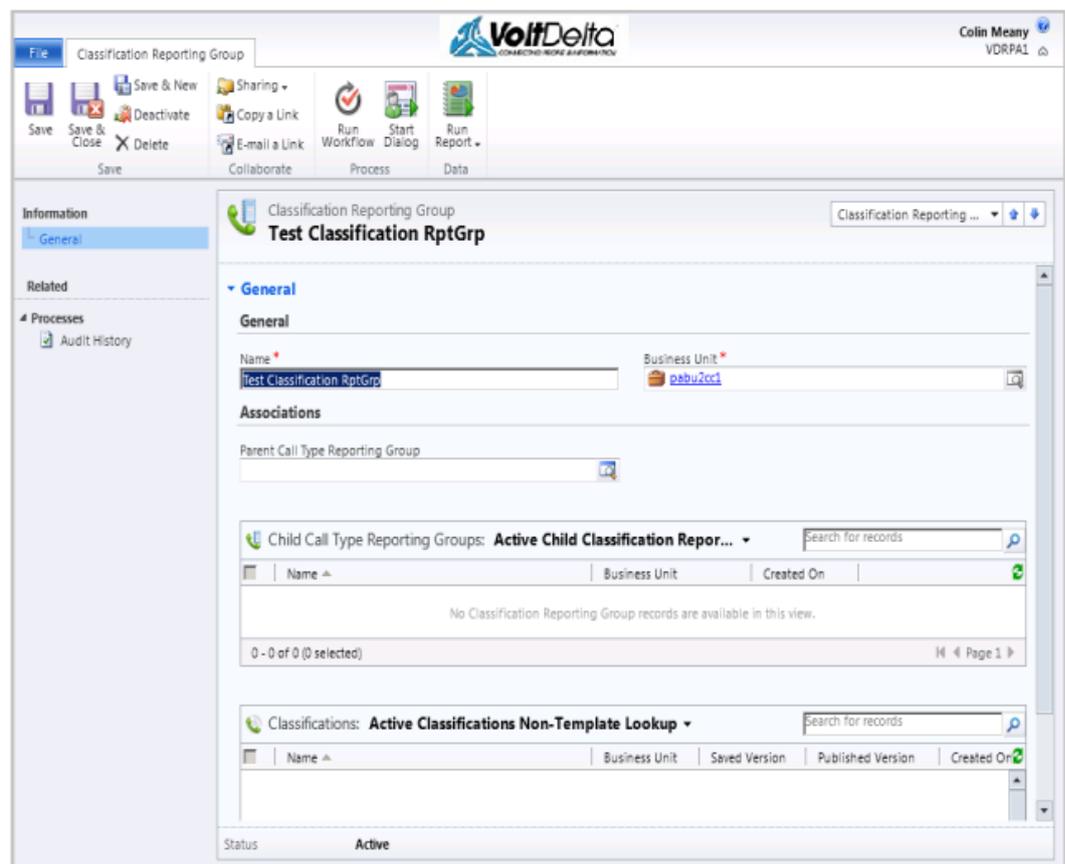
- 8 Click **Save & Close** to confirm your input and save the new Classification Reporting Group.

5.4.2 Assigning a Classification to a Classification Reporting Group

To assign a Classification to a Classification Reporting Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Classification Reporting Groups**.
- 2 Click the Classification Reporting Group to which you wish to assign one or more Classifications.

The Classification Reporting Group dialog is displayed for the selected group:



- 3 Click the **Classifications** area.
A new set of controls appears in the ribbon.

- 4 Click **Add Existing Call Type** in the ribbon.
The Look Up Records dialog is displayed.
- 5 Click the name of the desired Classification (Call Type) in the list to add it to the Selected Records area and then click **Add**



To select multiple entries click their corresponding check boxes, and then click **Add**.

- 6 Click **OK** to confirm your selection
You are returned to the Classification Reporting Group dialog. The selected Classification(s) now appear in the Classifications area.
- 7 Click anywhere outside the Classifications section to restore the ribbon, then click **Save & Close** to confirm your input.

6 Routing Plans

6.1 Overview

This chapter includes the following chapters:

- About Routing Plans
- Creating a Basic Routing Plan
- Creating a Subroutine Routing Plan
- Creating and Assigning a Service Address
- Viewing the Routing Plan Map
- Publishing a Routing Plan
- Routing Report / Tracing a Routing Plan
- Locking and Unlocking a Routing Plan
- Editing a Routing Plan
- Deleting a Routing Plan
- Copying a Routing Plan
- Routing to Another Business Unit
- Routing for E-mail and Web Chat
- Routing for Queue Hold and Scheduled Calls
- Routing for Blind Transfer to IVR



For details about individual Routing Steps, refer to Chapter 7, [Routing Steps](#)

6.2 About Routing Plans

Routing Plans are used to route incoming calls. Routing Plans are associated with Service Addresses (dialed numbers) and consist of one or more Routing Steps.

Time of Day and Queue handling are examples of operations that are performed within the Routing Steps. During a Routing Step, events such as Queue Full can trigger continuation with other Routing Steps for appropriate call handling.

Creating a Routing Plan that will be used to route calls involves the following steps:

1. Create a Routing Plan with its default Routing Step as described in chapter 6.3, [Creating a Basic Routing Plan](#).
2. Assign one or more Service Addresses to be impacted by the Routing Plan as described in chapter 6.5, [Creating and Assigning a Service Address](#).
3. Edit the default Routing Step and/or enter additional Routing Steps as described in chapter 7.2, [About Routing Steps](#).
4. Publish the Routing Plan as described in chapter 6.7, [Publishing a Routing Plan](#)

6.3 Creating a Basic Routing Plan

This chapter describes the procedure for creating a Routing Plan. When you create a Routing Plan, the software automatically includes a default Routing Step. You can edit the properties of the Routing Plan and its default Routing Step, and add additional Routing Steps as required.



The following procedure enables you to create the basic settings for a Routing Plan. You can then add routing steps to create a Routing Plan that will actually route calls. Chapter 6.3.2, [Example Routing Plans](#) provides a walkthrough where example Routing Plans are created.

To create a Basic Routing Plan, proceed as follows

- 1 In the Management Portal navigation pane, select **Multi Media Routing → Routing Plans**.

2 Click **New** in the ribbon.

The screenshot shows the VoltDelta software interface. The ribbon at the top contains several tabs: File, Routing Plans, View, Charts, and Add. The 'New' button, represented by a document icon with a plus sign, is highlighted with a red box. Below the ribbon, there is a 'Records' section with a search bar and a table of routing plans. The table has columns for Name, Business Unit, Classification, Service Provider, and Saved Version. The table lists various routing plans, such as 'ER-PRD1597 - Speech State Control...', 'ER-PRD1614 - Queue Hold & Call Sc...', and 'Manual-AgentDDI'. The bottom of the interface shows a 'Management' section with a 'Reporting' tab and a status bar indicating '51 - 68 of 68 (0 selected)' records.

Name	Business Unit	Classification	Service Provider...	Saved Version
<input type="checkbox"/> ER-PRD1597 - Speech State Control...	FC-CO	Auto07	Default	3
<input type="checkbox"/> ER-PRD1614 - Queue Hold & Call Sc...	FC-CO	Auto08	Default	2
<input type="checkbox"/> ER-PRD1614 - Virtual Hold (Auto Call...	FC-CO	Auto07	Default	1
<input type="checkbox"/> Error-Handling	FC-CO	Auto08	Default	4
<input type="checkbox"/> ER-VDR1622 - MMR Variable Exchan...	FC-CO	Auto07	Default	1
<input type="checkbox"/> ER-VDR1628 - Route List Routing Ste...	FC-CO	Auto08	Default	4
<input type="checkbox"/> ER-VDR1652 - Route List Routing Ste...	FC-CO	Auto07	Default	4
<input type="checkbox"/> Manual-AgentDDI	FC-CO	Auto08	Default	10
<input type="checkbox"/> Manual-Application-Routing-	FC-CO	Auto07	Default	5
<input type="checkbox"/> Manual-Called-RP2	FC-CO	Auto08	Default	3
<input type="checkbox"/> Manual-Loop-Tocado	FC-CO	Auto07	Default	9
<input type="checkbox"/> Manual-PQT-Remove More than 30...	FC-CO	Auto08	Default	1
<input type="checkbox"/> Manual-RP-Loop-1	FC-CO	Auto07	Default	21
<input type="checkbox"/> Manual-RP-Loop-2	FC-CO	Auto08	Default	4
<input type="checkbox"/> Manual-SetValueTest	FC-CO	Auto07	Default	13
<input type="checkbox"/> Manual-Set-Variable-Copy	FC-CO	Auto08	Default	2
<input type="checkbox"/> Manual-Set-Variable-Copy Copy M...	FC-CO	Auto08	Default	1

The Routing Plan dialog is displayed.

Routing Plan

Routing Plans

New

Saved Version

Published Version

Updated
No

General

Name *

Classification *

Always Reclassify Yes No

Service Provider +

Answer Call Yes No

Group

Convert CLI

Description

Business Unit *

Classification Business Unit

Routing Step (First) +

Error Handling Routing Plan +

Call Barring List

Subroutine Yes No

Service Addresses

Name	Address Lookup	Service Address	Translation Address	Originating Bla

0 - 0 of 0 (0 selected)
Page 1



Fields on this form have explicit tooltips explaining the role of each field.

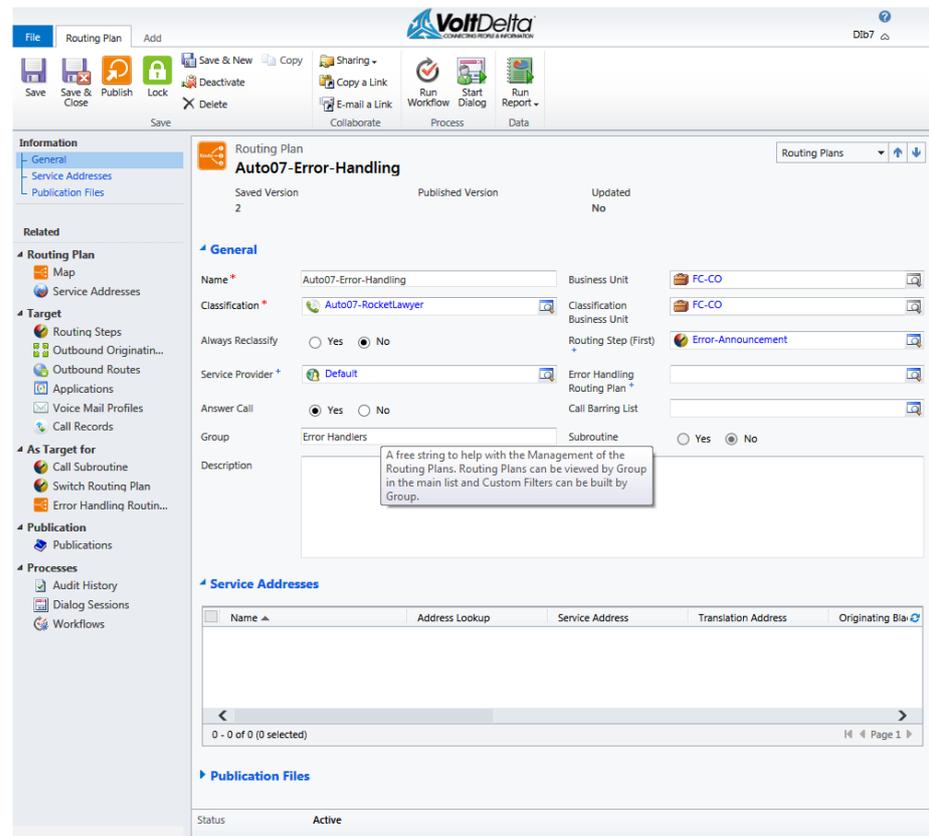
1 Enter the indicated data in the following fields:

Field	Description
Name	The name of the Routing Plan
Business Unit	Name of the Business Unit for which the Routing Plan is being created
Classification	Select the desired Classification to be associated with the Routing Plan
Always Reclassify	When set to Yes, the calls routed to the Routing Plan are always re-classified using the Classification above on the form. When set to No, the calls routed to the Routing Plan are only Re-Classified (i.e. given the Classification above on the form) if they arrive with the generic classification “CSA-MMR Classification”. If they arrive with any other valid Classification it is kept.
Service Provider	Name of the Service Provider to be associated with the Routing Plan. This field can be left blank if the Default Service Provider for the Business Unit is to be used
Answer Call	Select whether the call should be answered when the Routing Plan executes. This field is typically set to Yes, which is necessary for a Routing Plan to play an announcement.
Group	A free text field that can be used with Filtered Views to group Routing Plans and view related Plans together.

Field	Description
Subroutine	Determines whether the Routing Plan is a subroutine or not. Yes - Other Routing Plans will call this as a subroutine. No - It is a normal Routing Plan that must have a Service Address.
Convert CLI	Determines whether the SIP-specific suffix should be removed from the CLI of incoming calls (e.g. whether 123@domain.com should be converted to 123).
Error Handling Routing Plan	Select a Routing Plan to be used in case the current plan cannot be processed (for example, due to a major fault). Currently, this feature is implemented only for the case where a Voice Mail profile is configured with no prompts.
Call Barring List	List of numbers that are barred from being handled by the plan

2 Click **Save** in the ribbon

This step saves the Routing Plan, creates the first Routing Step, and enables the Service Addresses area.



3 Continue configuration of the Routing Plan with as described in chapter 6.5, [Creating and Assigning a Service Address](#)

6.3.2 Example Routing Plans

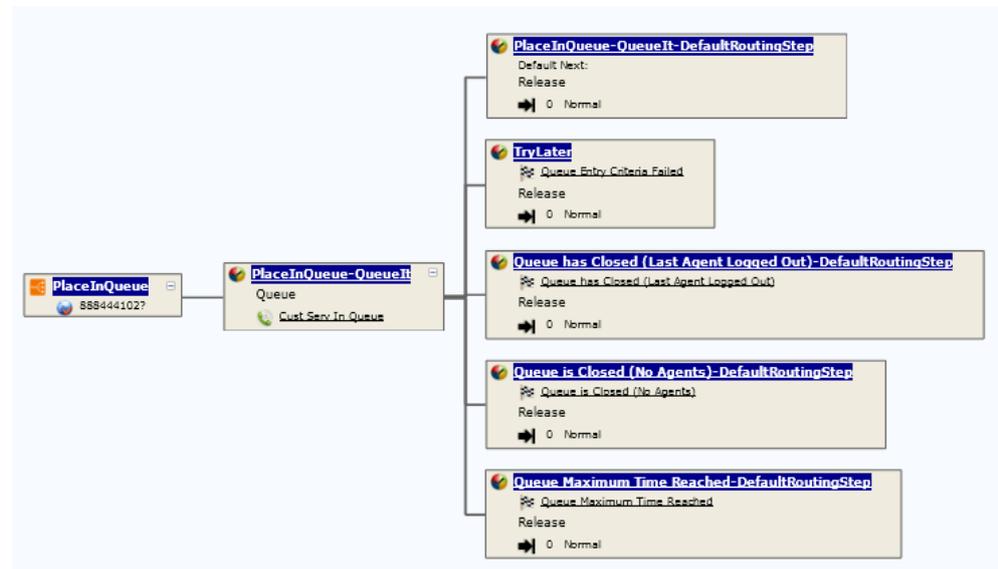
This chapter provides example procedures for the following types of Routing Plans:

- Creating a Routing Plan with a Single Step
- Creating a Routing Plan with Multiple Steps

6.3.2.1 Creating a Routing Plan with a Single Step

The following example creates a Routing Plan with a single step where a call is simply placed in queue. In the example, four Events have been

defined for the queueing step. The figure below shows a Routing Plan Map for the example, including the defined Events.



To create this example Routing Plan, a Queue must be available in the Business Unit. Refer to chapter 3.3.1, [Creating a Queue](#) for details on creating a Queue.

To create the example Routing Plan, proceed as follows:

- 1 Create a Routing Plan as described in step 1 through 2 in chapter 6.3, [Creating a Basic Routing Plan](#).
- 2 In the Routing Plan dialog, click the name in the Routing Step (First) field.



This Routing Step was created automatically when the Routing Plan was first saved. By default it will always have a suffix of “FirstStep,” but this name can be changed into something more descriptive, if desired.

The Routing Step dialog is displayed

The screenshot shows the 'Routing Step' dialog box in the VoltDelta software. The title bar indicates the user is Colin Meany (VDRPA1). The dialog is titled 'Routing Step' and shows the configuration for 'PlaceInQueue-FirstStep'. The 'Routing Plan' is 'PlaceInQueue', the 'Saved Version' is 1, and it has not been updated. The 'General' tab is active, showing the 'Name' field set to 'PlaceInQueue-QueueIt', the 'Business Unit' set to 'PARU2CTOP1', and the 'Type' set to 'Release'. Under the 'Route To Release' section, the 'Release Cause Code' is set to 'Normal'. The status at the bottom is 'Active'.



Note that the Type field is set to Release by default

- 3 Optionally, in the Name field, enter a more descriptive name for the action performed during this step

4 Click the **Type** field and select **Queue**

Additional fields appear in the dialog

The screenshot shows the 'PlaceInQueue-Queue' dialog in the VoltDelta software. The ribbon at the top includes 'File', 'Routing Step', and 'Add'. The main area is divided into sections: 'General' with fields for Name, Business Unit, and Type; 'Default Next' with a 'Default Next Step' field; 'Route To Queue' with 'Route To Queue' and 'Queue Business Unit' fields; and 'Events' with a table of events. The status bar at the bottom indicates 'Active'.

<input type="checkbox"/>	Name	Follow On Routing Step	
<input type="checkbox"/>	Call Release		
<input type="checkbox"/>	Queue DTMF Digit Received		
<input type="checkbox"/>	Queue Entry Criteria Failed	TryLater	

5 Click the button to the right of the **Route To Queue** field

6 In the **Look Up Record** window that is displayed, select the **Queue** and then click **OK**

The **Routing Step** window for the “**FirstStep**” is re-displayed

7 If desired, set values for the following optional items

- **Re-Classify a Call**—The **Classification** and/or **Service Provider** of the call can be changed before it is placed into queue, chapter 7.3.3, [Reclassification Fields](#) describes the options
- **Set Call Profiling Parameters**—Call Profiling Properties can be overridden by clicking **Set Call Profiling Parameters** in the ribbon, chapter 7.3.4, [Set Call Profiling Parameters Dialog](#) describes the options

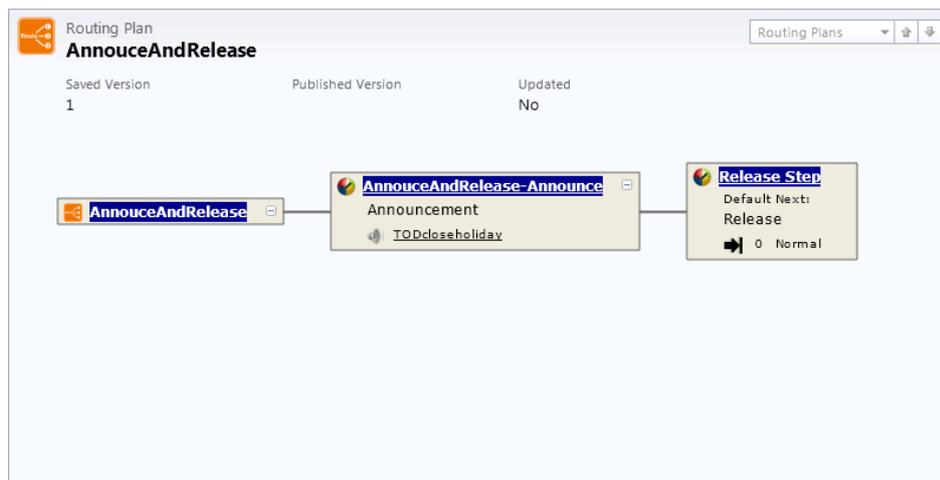
8 Click **Save** in the ribbon

- 9 Set up the following Events for the queue step. For details about working with Events, refer to chapter 7.3.5, [Editing an Event for a Routing Step](#). For a description of Events specific to a Queue Routing Step, refer to chapter 7.5.11.1, [Events](#)
 - **Queue Entry Criteria Failed**
 - **Queue has Closed (Last Agent Logged Out)**
 - **Queue is Closed (No Agents)**
 - **Queue Maximum Time Reached**
- 10 Click **Save & Close** to save the Routing Step and return to the Routing Plan dialog
- 11 Publish the Routing Plan as described in chapter 6.10, [Publishing a Routing Plan](#)

6.3.2.2 Creating a Routing Plan with Multiple Steps

Chapter 6.3.2.1, [Creating a Routing Plan with a Single Step](#) illustrates how to create a simple Routing Plan with only one step. However, in practice Routing Plans often have multiple steps.

The following example describes a Routing Plan with two steps. In the first step, an announcement is played to the caller stating that the business is closed during a holiday. In the second step, the call is released. For this example, no Events have been configured. The figure below shows a Routing Plan Map for the example.



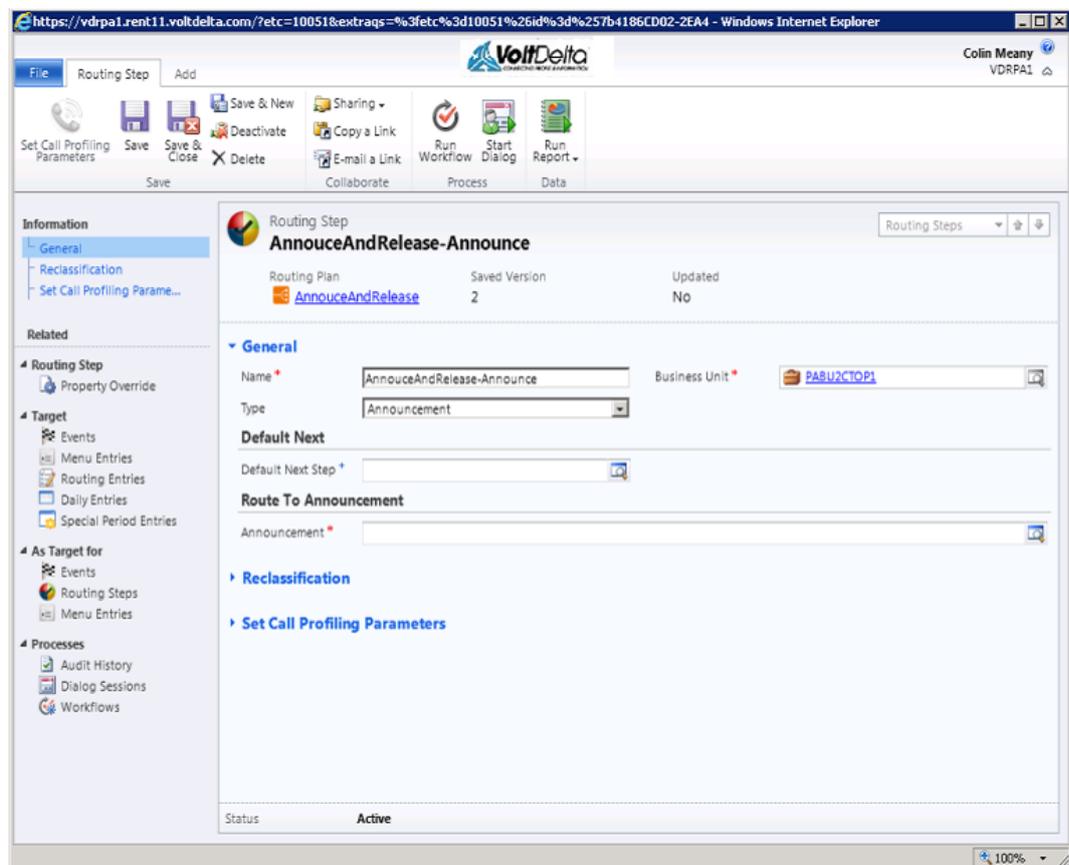
To create this example Routing Plan, an Announcement must be available in the Business Unit. Refer to chapter 10.6, [Creating an Announcement](#) for details on creating an announcement.

To create the example Routing Plan, proceed as follows:

- 1 Create a Routing Plan as described in chapter 6.3, [Creating a Basic Routing Plan](#).
- 2 Assign one or more Service Addresses to the Routing Plan as described in chapter 6.5, [Creating and Assigning a Service Address](#).
- 3 In the Routing Plan dialog, click the **Routing Step (First)** field to configure the first Routing Step.

The Routing Step FirstStep dialog is displayed

- 4 Optionally, in the Name field, enter a descriptive title for the step
- 5 In the Type field, select **Announcement**



- 6 Click the button to the right of the Default Next Step field

The Look Up Record dialog for Routing Steps is displayed.

Look Up Record
 Enter your search criteria and click Search to find matching records. Filter your results and view different columns of data by using the View options. Then, select the record you want and click OK.

Look for: Show Only My Records

View:

Search:

	Name ▲	Business Unit	Routing Plan	Route Select
<input checked="" type="checkbox"/>	AM Weekday Close	PABU2CTOP1		Announcem... ▲
<input type="checkbox"/>	AM Weekday Close-DefaultRouting...	PABU2CTOP1		Release
<input type="checkbox"/>	Christmas-DefaultRoutingStep	PABU2CTOP1		Release
<input type="checkbox"/>	Closed	PABU2CTOP1		Announcem...
<input type="checkbox"/>	Closed-DefaultRoutingStep	PABU2CTOP1		Release
<input type="checkbox"/>	Everyday Lunch-DefaultRoutingStep	PABU2CTOP1		Release
<input type="checkbox"/>	Greeting Menu-DefaultRoutingStep	PABU2CTOP1		Release
<input type="checkbox"/>	Greeting Menu-DefaultRoutingStep	PABU2CTOP1		Release
<input type="checkbox"/>	Greeting Voicemail-DefaultRouting...	PABU2CTOP1		Release
<input type="checkbox"/>	Incoming Agent Queue Test-FirstSt...	PABU2CTOP1		Queue
<input type="checkbox"/>	Incoming Agent Queue Test-FirstSt...	PABU2CTOP1		Release
<input type="checkbox"/>	Incoming Montreal Dev OMB-FirstS...	PABU2CTOP1		Release

1 - 50 of 64 (1 selected) Page 1

7 Click New

The Routing Step dialog is displayed.

The screenshot shows the 'New Routing Step' dialog box in the VoltDelta software. The dialog is titled 'New' and has a 'Routing Step' dropdown menu. The 'General' tab is selected, showing the following fields:

- Name:** Release Step
- Business Unit:** PARUZCTOP1
- Type:** Release
- Release Cause Code:** Normal

The status is 'Active'.

8 Complete the following fields

- Name — Name of the routing step
- Business Unit — Name of the Business Unit
- Release Cause Code — Keep the default value.

9 Click **Save & Close** to return to the Look Up Record dialog.

10 Click **OK** to return to the Routing Step dialog (Release step).

11 Click **Save & Close** to return to the Routing Step dialog (first step – Announcement)

12 Select the announcement to play by clicking the button next to the Announcement field



For details on announcements, refer to chapter 10.2, [Introduction to Prompt Management](#).

13 Click **Save & Close** to return to the Routing Plan dialog

14 Save the Routing Plan.

15 Publish the Routing Plan as described in chapter 6.7, [Publishing a Routing Plan](#).

6.4 Creating a Subroutine Routing Plan

6.4.1 Overview

Subroutine Routing Plans are special Routing Plans that can be called by other Routing Plans to carry out specific sets of actions before returning to the calling Routing Plan and continuing its execution from where it was. Subrouting Routing Plan are not invoked via a Service Address and typically only used by other Routing Plan. They would typically contain a set of operations that other Routing Plans may want to invoke repetitively. They are an important feature to help structure Routing Plans and improve their readability.



The following procedure enables you to create the basic settings for a Subroutine Routing Plan. You can then add to it the required Routing Steps. Chapter 6.3.2, [Example Routing Plans](#) provides a walkthrough where example basic Routing Plans are created.

To create a Subroutine Routing Plan, please use the same procedure as for a Basic Routing Plan (see Chapter 6.3) but select the following option:

The screenshot shows the 'New Routing Plan' configuration page. The 'Subroutine' option is highlighted with a red box, indicating it should be selected. The 'Subroutine' field has a radio button for 'Yes' which is selected, and a radio button for 'No' which is unselected.

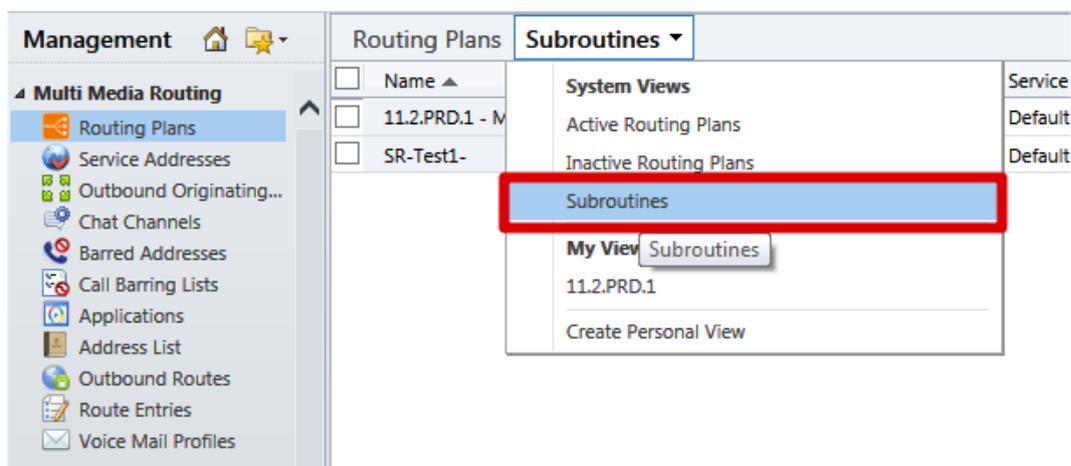
Once a Subroutine has been created and saved once, this Option cannot be changed anymore.

The first time a Subroutine Routing Plan is Saved, it is created with a single Release Routing Step. To ensure it operates successfully as a

Subroutine and returns to the calling Routing Plan, the last Release Routing Step(s) must be changed into *Subroutine Return* Routing Steps. This ensures that execution continues in the Calling Routing Plan from the point where the Subroutine was called (See also Chapters 7.5.16, [Set Values](#) and 7.5.18, [Subroutine Return](#)).

6.4.2 Viewing Subroutine Routing Plans

Subroutine Routine Plan can be viewed using dedicated Filtered View *Subroutines*.



6.4.3 Remarks

Please be aware of the following when using Subroutine Routing Plans

Field	Description
Service Address	Service Addresses attached to a Subroutine Routing Plans are ignored.
Classification	This option is ignored. The Call always keeps the Classification given by the calling plan.
Always Reclassify	This option is ignored. The Call always keeps the Classification given by the calling plan.
Service Provider	This option is ignored.
Release Routing Step	A Release Routing Step can be used in a Subroutine Routing Plan but is not recommended. A Release Routing Step always releases the Call and the execution flow is the broken and does not return to the Calling Plan. For clarity, it is recommended that Subroutine Routing Plans always return to the Calling Plan where the Release can be carried out.

Field	Description
Subroutine Return	<p>A Subroutine Return Routing Step is the recommend way to exist a Subroutine.</p> <p> Subroutine Return Routing Steps are not allowed in Basic Plans. Such plans cannot be saved.</p>

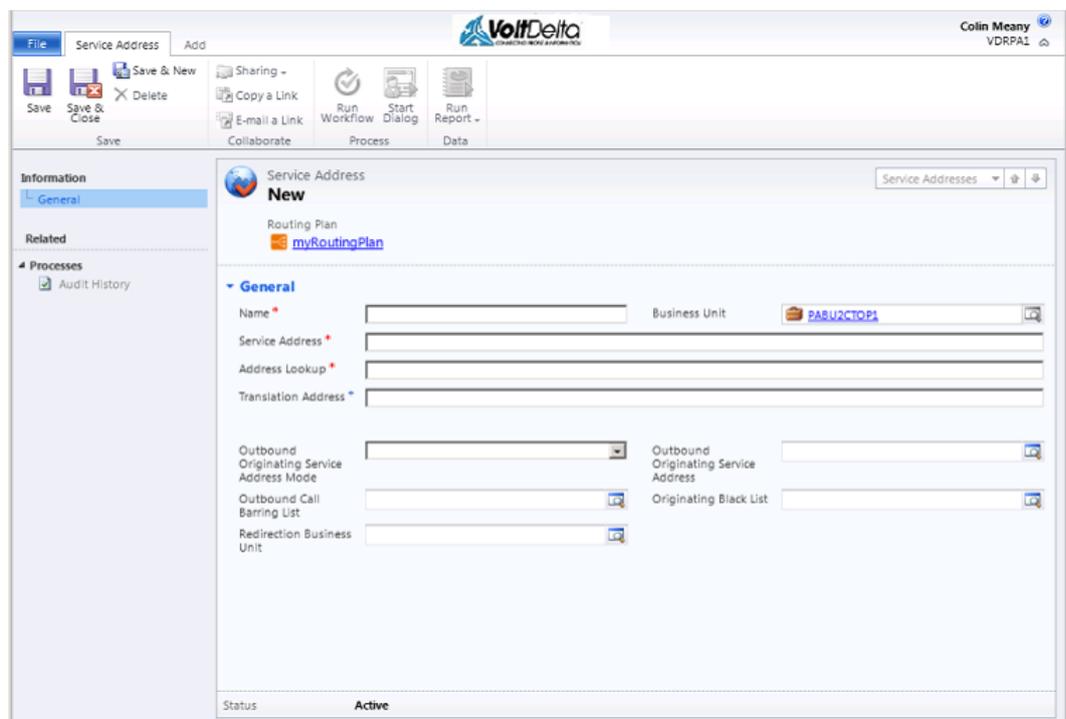
6.5 Creating and Assigning a Service Address

A Reseller organization is responsible for working with the System Host Administrator to define the range of Service Addresses that a Contact Operation will use. These addresses are then created by the System Host Administrator and assigned to the Reseller. The Reseller redirects the Service Addresses to the Contact Operation(s), who will use the assigned Service Addresses in their Route Plans.

After you create the basic Routing Plan, create and assign one or more Service Addresses for the plan as follows:

- 1 In the Routing Plan dialog, click anywhere in the empty Service Address area, and then click **Add New Service Address** in the ribbon. Or, if you are creating a Service Address independent of a Routing Plan, in the Management Portal navigation pane, select **Multi Media Routing → Service Addresses**.

The New Service Address dialog is displayed.



The screenshot shows the 'New Service Address' dialog in the VoltDelta management portal. The dialog is titled 'Service Address New' and is associated with the 'myRoutingPlan' routing plan. The 'General' tab is active, showing the following fields:

- Name:** (empty text box)
- Business Unit:** PARU2CTOP1 (dropdown menu)
- Service Address:** (empty text box)
- Address Lookup:** (empty text box)
- Translation Address:** (empty text box)
- Outbound Originating Service Address Mode:** (empty dropdown menu)
- Outbound Call Barring List:** (empty dropdown menu)
- Redirection Business Unit:** (empty dropdown menu)
- Outbound Originating Service Address:** (empty text box)
- Originating Black List:** (empty text box)

The status at the bottom is 'Active'.

2 Enter the indicated data in the following fields:

Field	Description
Name	A display name for the Service Address. This might describe the service the address is for, e.g. Customer 1 Sales.
Business Unit	Set this to the same Business Unit as the Routing Plan to which it applies.
Service Address	Display field for what a caller might consider to be the Service Address. For example, the service address might be a non-geographic number that is used for the caller's service, while the actual address that arrives on the system might be a Direct Inward Dialing (DID) number or a geographic number
Address Lookup	Pattern that the software logic uses to match against the Called Party Address for the inbound call. The following optional wildcard characters are also supported, either separately or together: * — Replaces one or more characters ? — Replaces a single character For example, <i>TelephoneNumber@*</i>
Translation Address	Translates the Routing Address to that specified by this field. This is the current active destination address associated with a call which is used for routing purposes. This is subject to translation throughout the process of a call and therefore can change throughout a call. For example, this field could be used to translate Routing Address (received from an inbound call) to the destination address for an outbound call.
Outbound Originating Service Address	The Calling Party Address (CLI) to use if an outbound call is made as a result of executing a Routing Plan for this Service Number. This is only used if the Outbound Originating Service Address Mode is set to Outbound Originating Address.

Field	Description
Outbound Call Barring List	<p>Assigns an Outbound Call Barring List to the call that is used whenever an outbound call is made during the lifetime of the call. Outbound calls are prohibited to the barred addresses. The outbound call can be made by a workstation or an IVR. (Barring lists are published separately from the Routing Plan and take effect when published, independently of the Routing Plan publication.)</p> <p>Call Barring is implemented as three levels in the following priority:</p> <ul style="list-style-type: none"> 1—Service Address 2—Routing Plan 3—Classification <p>For Agent-originated calls (without an inbound call), you need to apply Call Barring to the Classification.</p>
Originating Black List	<p>This is a black list containing originating numbers (CLIs) from which the call should be rejected..</p> <p> The Address List must be published separately from the Routing Plan. Since the Address List can be used by multiple Routing Plans, making changes and publishing the Address List will affect all Routing Plans using the Address list even though the Plans themselves are not republished. Please see chapter 6.5.1 Publication of Address Lists for more details.</p>
Redirection Business Unit	<p>If a Business Unit is specified for this field, all calls that match this Service Address are routed to a Service Address at the specified Business Unit. For details about using redirection, refer to chapter 6.13, Routing to Another Business Unit.</p>

3 Click **Save & Close** in the ribbon

This not only saves the Service Address, but also assigns it to the Routing Plan and returns you to the Routing Plan dialog



If necessary, you can add Multiple Service Addresses.

- 4 Configure the Routing Steps using the information provided in chapter 7.2, [About Routing Steps](#).

6.5.1 Publication of Address Lists

6.5.1.1 Overview

The Publication of Address Lists independently is an optional feature. The Address Lists associated with the Service Addresses and the Routing Steps of a Routing Plan are published together with the Routing Plan and the Routing Engine supports them but overrides them with the versions published independently if they are available.

The Address Lists inside the Routing are used if:

- a) The Address List is not being independently published
- b) The Address List has not yet been independently published (the ensures a safe upgrade procedure).
- c) The Address List that was previously published has been deleted.



It is not possible to delete an Address List without removing it first from the Routing Plans using it. However, the modified Routing Plan may not have yet been published at the time the Address List is deleted and removed from the Routing Engine. At that point, the Routing Engine automatically reverts to using the Address List inside the Routing Plan until the Plan is re-published without them. The deletion of a publishable entity is always automatically and immediately published.

Routing Plans may use several Address Lists and an administrator may choose to manage some of them centrally by publishing them independently but not the others.

Once an Address List has been published, it cannot be un-published to force the Routing Plans to revert to the embedded versions. The Address List may be deleted but this forces the Administrator to remove it from all the Routing Plans using it (Please see NOTE above).

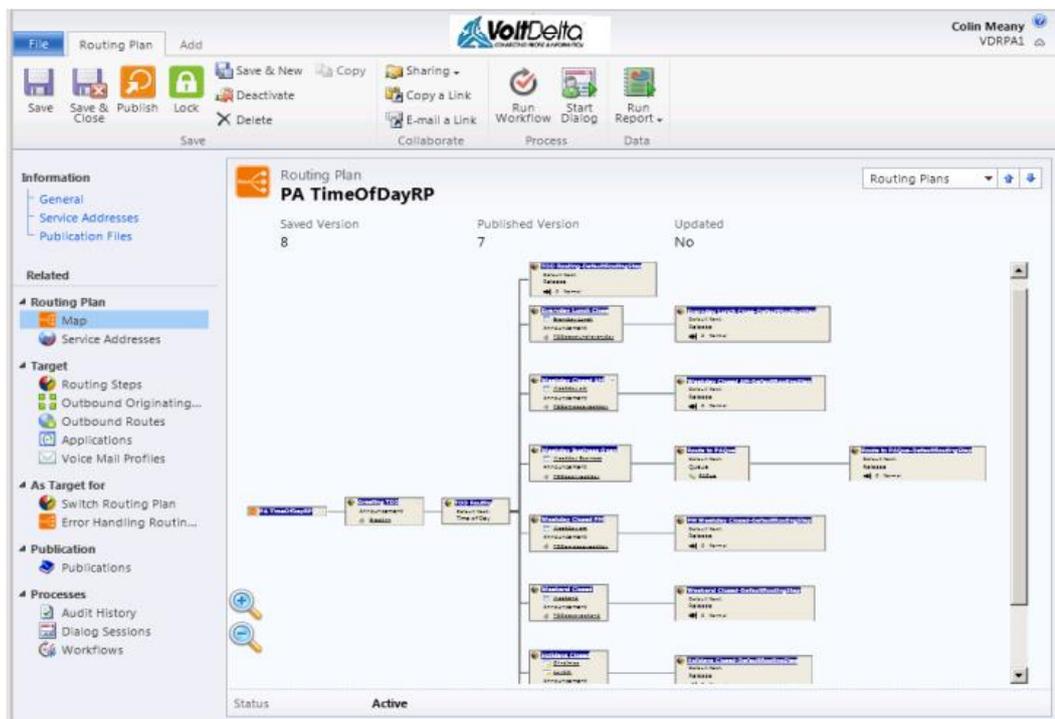
6.5.1.2 Upgrade and Backward Compatibility

Following an upgrade, all the Routing Plans will continue to work as before until the Address List they reference is published. Once CSA-MMR has a version of the Address List cached, it immediately uses it for any Routing Plan referencing it instead of the details inside the Routing Plan XML

6.6 Viewing the Routing Plan Map

To view (and optionally edit) a graphical representation of the Routing Plan, open a Routing Plan, and in the navigation pane in the left margin, click Routing **Plan** → **Map**

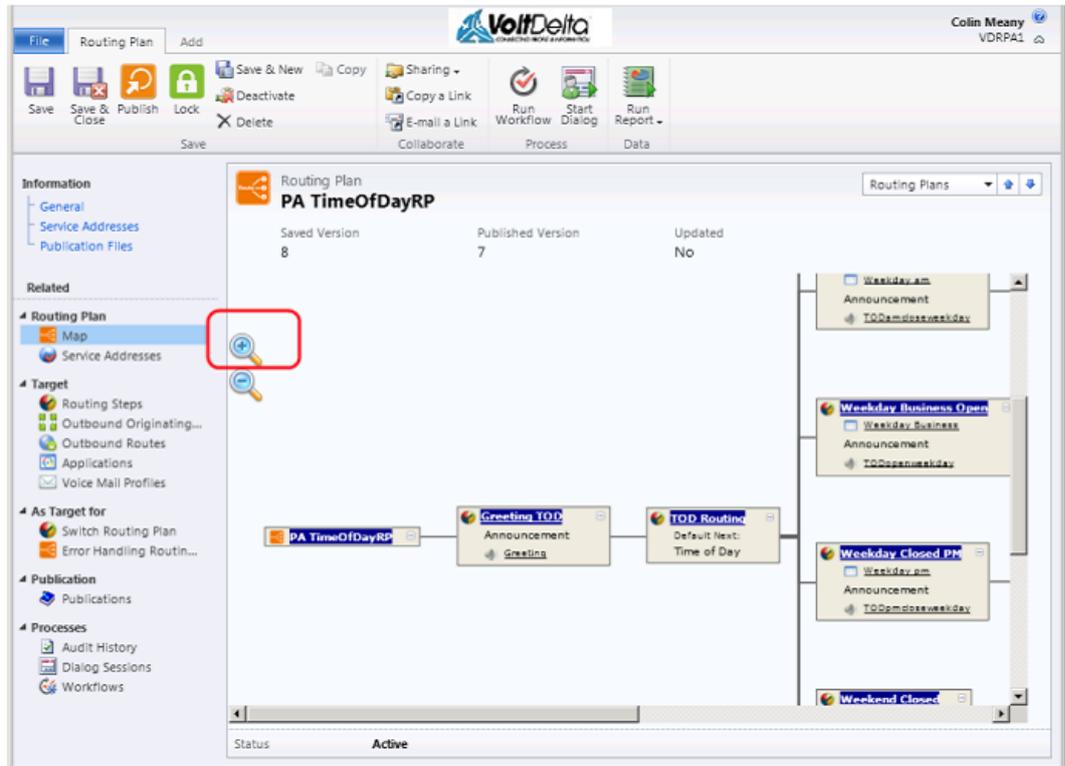
The Routing Plan Map is displayed.



You can click the underlined heading in any of the blocks on the map to open the dialog for that Routing Step in a new window for viewing and editing.

If the Routing Map is complex (such as that shown in figure above), you can click the magnifier icon to enlarge the map, as shown in the figure below. This can also be achieved using the standard Windows CTRL+Mouse Scroll combination. You can then pan and scroll on the

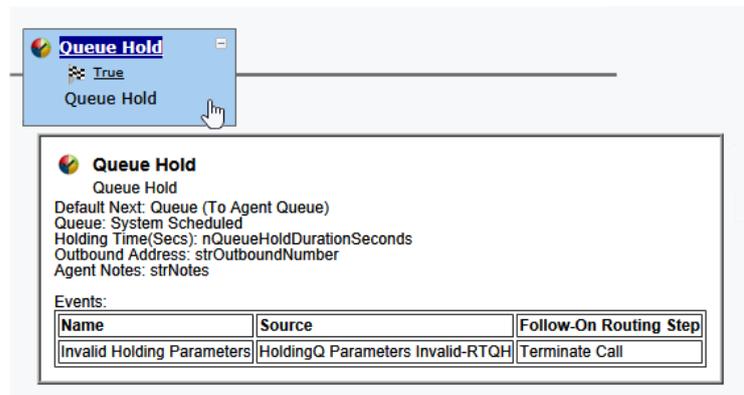
map as required either using the scroll bar or simply moving the Map sheet with the Mouse.



The Routing Plan Map provides additional information when the mouse Cursor is placed over the Routing Steps

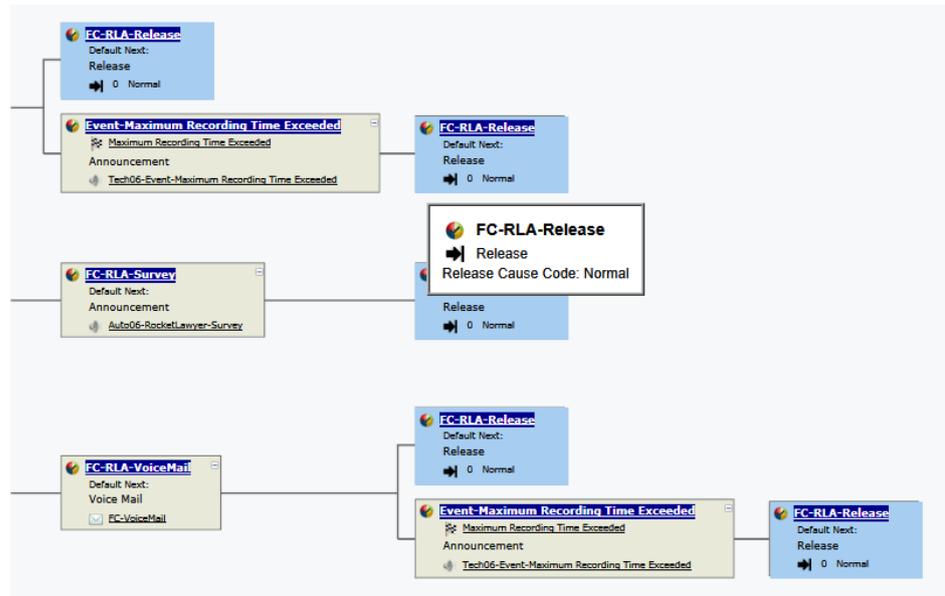
6.6.1 Tool Tips

Tool Tips are displayed beside the Routing Steps. Where relevant, they provide an immediate access to additional information without the need to open the Routing Step form.



6.6.2 Duplicate Steps

If a particular Routing Step is used several times in a Routing Plan, they will appear several times on the Routing Plan Map. When the Mouse hovers over them, all the instances of the Step are highlighted blue.

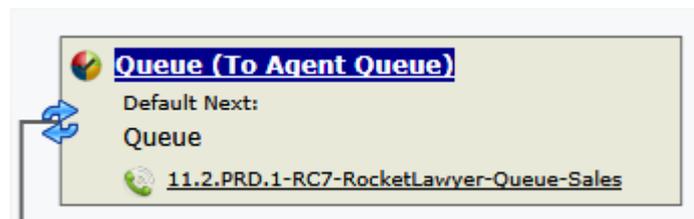


This must not be confused with the Looping Feature described in chapter 6.6.3.

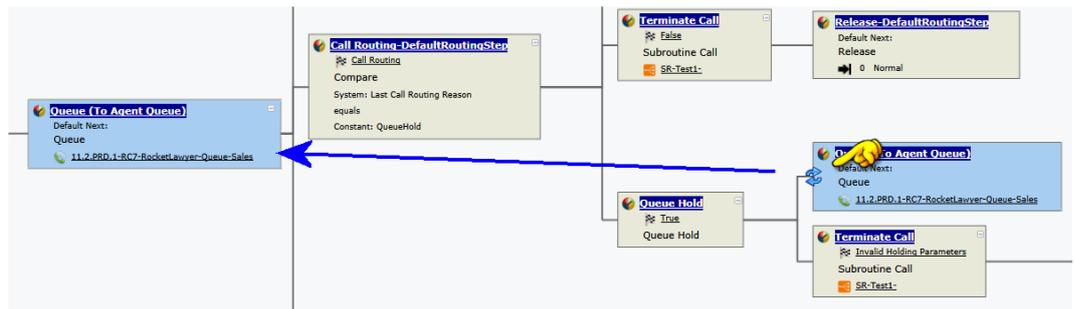
6.6.3 Looping Back to an Earlier Routing Step

If the Routing Plan loops back to a Routing Step traversed earlier in the flow, this Routing Step is shown as a terminating leaf in the Routing plan but it is marked with the Loop Icon  at the connection point with the preceding Routing Step. The Routing Plan reader can then jump back to the original Routing Step earlier in the Routing Plan. It can be easily found by hovering over the Looped Routing Step, as both will be highlighted in blue.

The Looping Icon on a Routing Step:



Highlighting the Looped Routing Step:

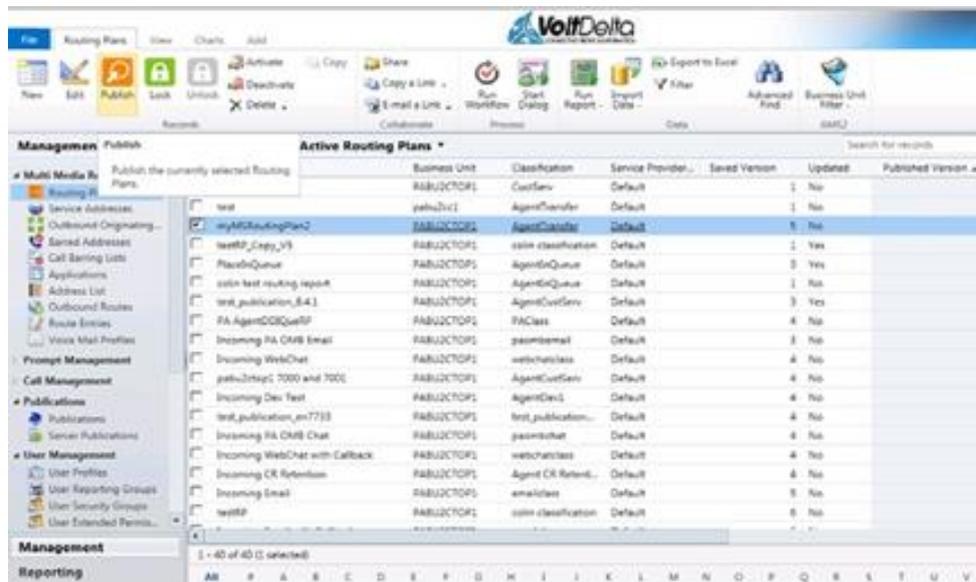


6.7 Publishing a Routing Plan

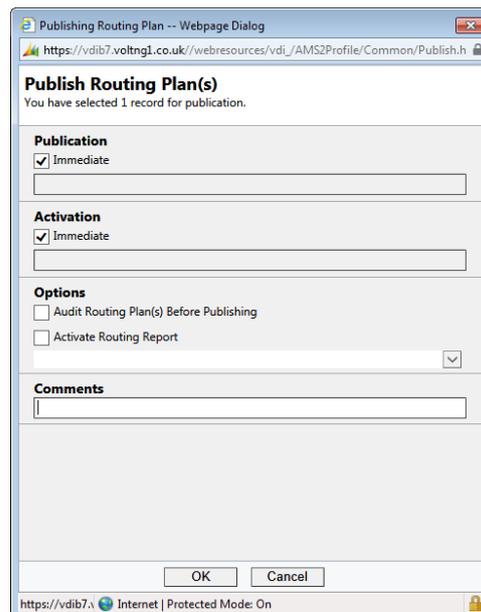
Newly created or modified Routing Plans must be published (downloaded) into the OASIS system to take effect

To publish a Routing Plan, proceed as follows:

- 1 In the Management Portal navigation pane, select **Multi Media Routing → Routing Plans**.
- 2 Click the check box next to the desired Routing Plan and click **Publish** in the ribbon.



The Confirm Publishing Routing Plan dialog is displayed.



- 3 Optionally, enter the following information:
 - Publication—This field enables you to specify a time at which the item will be published. By default, Immediate is selected so that item is published when you click **OK**.
 - Activation—This field enables you to specify a time at which the item will be activated on the target server. This is useful for grouping multiple changes to take effect at the same time. For example, changes can be made to multiple items, and then all these changes can be activated together at midnight. By default, Immediate is selected so that item is activated when you click **OK**.
 - Audit Routing Plan(s) Before Publishing—When selected, this option checks all the sub-entities for the routing plan (Classifications, Queues, Announcements, Service Announcement Profiles, and so on) and reports if they have not been published, or if another problem exists. If an issue is found, the publication of the Routing Plan is aborted..
 - Activate Routing Report—When selected, this option activates tracing for the execution of the Routing Plans. The trace data is useful for troubleshooting what happens to a call while executing a Routing Plan. For details about this option, refer to chapter 6.8, [Tracing a Routing Plan](#).
- 4 In the Comments field, enter a comment describing the reason for publishing
- 5 Click **OK** to publish the Routing Plan:

6.8 Routing Report / Tracing a Routing Plan

You can turn on the tracing feature for a Routing Plan to generate tracing data that is helpful for debugging purposes. Tracing is activated for a specified duration of time and generates data for each Routing Step that is executed within the selected Routing Plan.

To enable tracing, proceed as follows:

- 1 Enable tracing for the Routing Plan by selecting the option, **Activate Routing Report**, as described in step 3 of chapter 6.7, [Publishing a Routing Plan](#). Select the duration (5 minutes, 15 minutes, 1 hour, or 6 hours) for the trace to be active.

The Routing Report is then available from the Call Record which is created for every Call.

- 2 Open the Management Portal Reporting user interface and choose **Reports**→ Call Records.

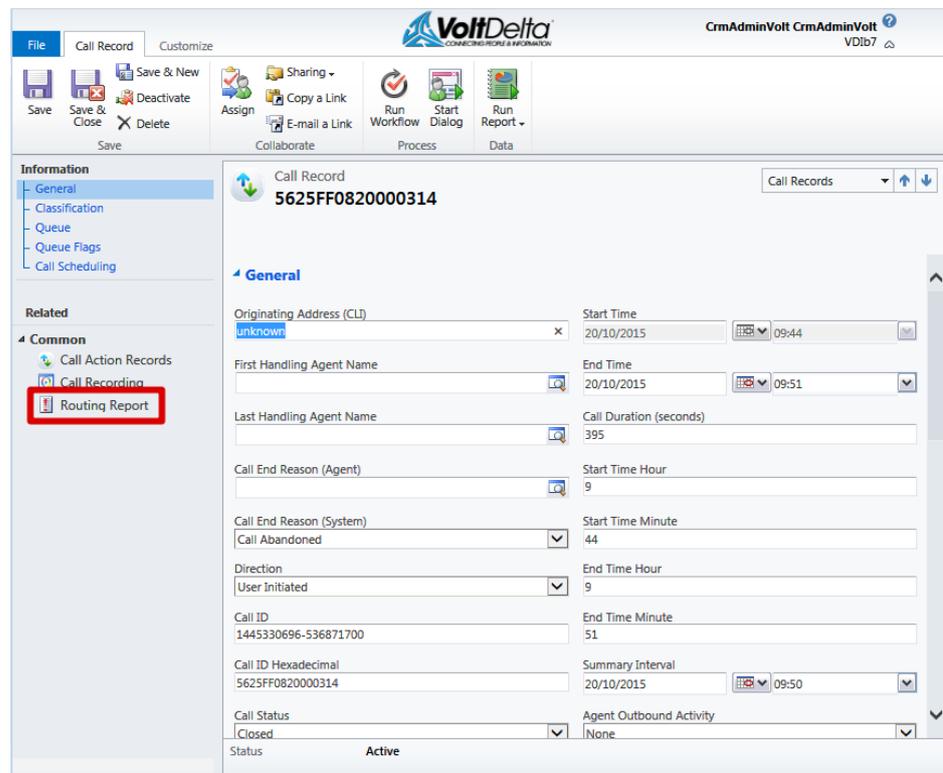


If you are working with a Routing Plan, you can access the Call Records for all the Calls that used this Routing Plan by clicking directly on **Call Records** on the Side Bar of the Routing Plan. This is a faster route than Opening the Reporting Area and looking for your Calls.

- In the Call Records window, select the type of Call View you require, e.g. **Closed Calls** from the ribbon.

Start Time	Name	Business Unit	Service Address (CPN)
20/10/2015 09:44	5625FF0920000317	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FF0820000316	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FF0820000315	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FF0820000314	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FF0820000314	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FEF320000312	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FEE920000311	MPS	ScheduledCallsMPS
20/10/2015 09:44	5625FEDF20000310	MPS	ScheduledCallsMPS
20/10/2015 09:43	5625FECA2000030F	MPS	ScheduledCallsMPS
20/10/2015 09:43	5625FEC72000030E	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F9012000030D	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F9002000030C	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F9002000030B	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F8FF2000030A	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F8FF20000309	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F8FF20000308	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F8F420000307	MPS	ScheduledCallsMPS
20/10/2015 09:19	5625F8F420000306	MPS	ScheduledCallsMPS

- Click on the name of the Call you wish to review.
The Call Record dialog is displayed:



5 In the left margin of the Call Record dialog, click **Routing Report**.

The Routing Report displays a summary for each Routing Step that was executed within the Routing Plan. The last operations are at the top:

Event Time	Sequence	Routing Plan	Routing Step	Type	Report
10/22/2015 10:44 AM	8	11.2.PR.D1-RC7-Manual Queue Hold	Release-DefaultRoutingStep	Release	Releasing Call with Cause Code [Normal].
10/22/2015 10:44 AM	7	11.2.PR.D1-RC7-Manual Queue Hold	Terminate Call	Subroutine Call	Returned from Subroutine [SR-Test1-].
10/22/2015 10:44 AM	6	SR-Test1-	SR-Return-Final	Subroutine Return	Returning from Subroutine [SR-Test1-] to plan [11.2.PR.D1-RC7-Manual Queue Hold].
10/22/2015 10:44 AM	5	11.2.PR.D1-RC7-Manual Queue Hold	Terminate Call	Subroutine Call	Calling Subroutine [SR-Test1-].
10/22/2015 10:44 AM	4	11.2.PR.D1-RC7-Manual Queue Hold	Queue (To Agent Queue)	Queue	Event [Queue is Closed (No Agents)]: No Follow-On Routing Step specified. Executing Default Next Step [Terminate Call].
10/22/2015 10:44 AM	3	11.2.PR.D1-RC7-Manual Queue Hold	Queue (To Agent Queue)	Queue	Routing Call to Queue [11.2.PR.D1-RC7-RocketLawyer-Queue-Sales].
10/22/2015 10:44 AM	2	11.2.PR.D1-RC7-Manual Queue Hold	Initialise Outbound Number	Set Value	Setting Variable [strNotes] to [123456789_123456789_123456789_123456789_123456789_123456789_123456789_123456789_123456789_123456789].
10/22/2015 10:44 AM	1	11.2.PR.D1-RC7-Manual Queue Hold	Initialise Outbound Number	Set Value	Setting Variable [strOutboundNumber] to [529].

In this example, the Routing Plan executed attempts to Queue the Call to an Agent but the Queue is Closed. It then executes a Subroutine before Releasing the Call. Each Routing Report line can be opened to view additional details.

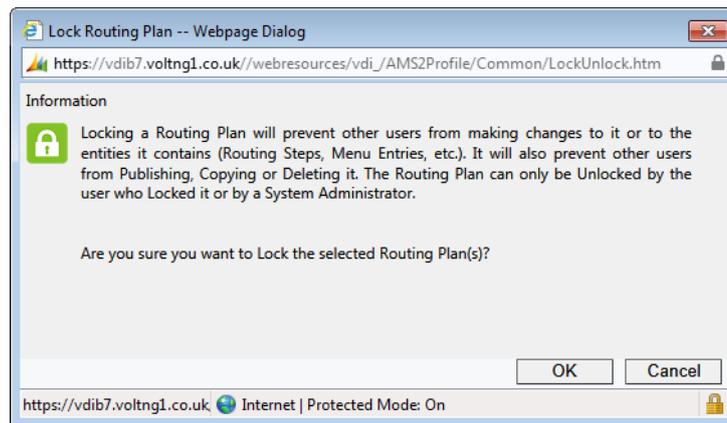
6.9 Locking and Unlocking a Routing Plan

Locking a Routing Plan prevents other administrative users from publishing, copying, or editing the Routing Plan.

Although Volt Delta recommends that you lock a Routing Plan before editing it, locking is not required. However, locking is required if you want to delete a Routing Plan.

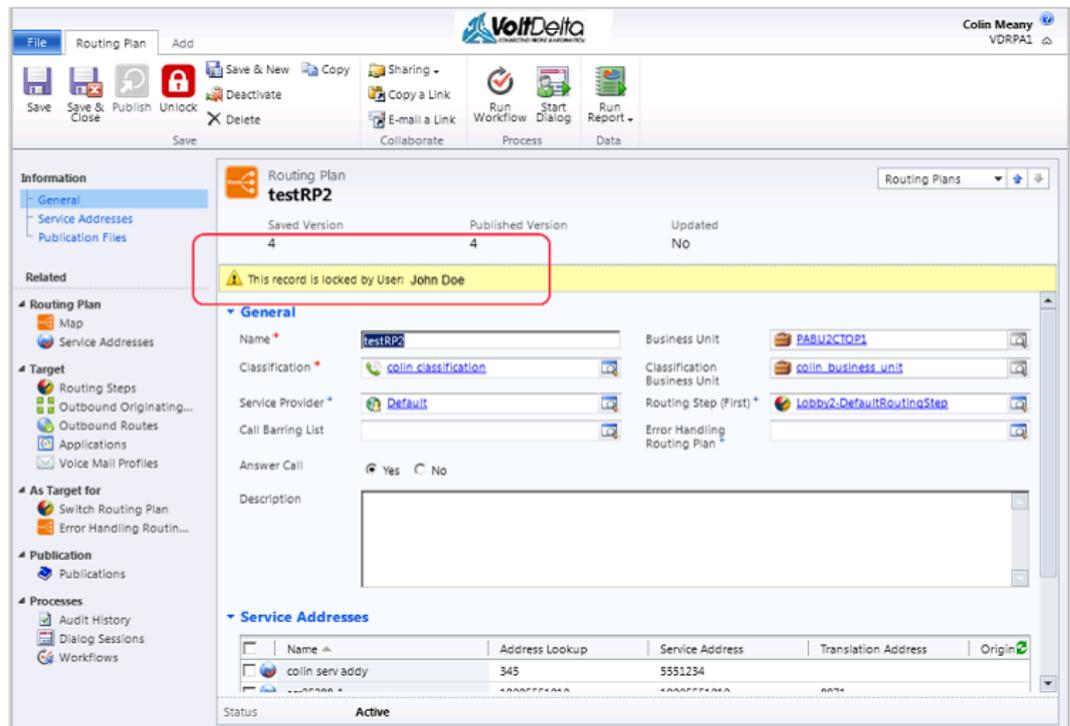
To Lock a Routing Plan, proceed as follows:

- 1 In the Management Portal navigation pane, select **Multi Media Routing → Routing Plans**.
- 2 Click the name of the desired Routing Plan.
The Routing Plan is displayed.
- 3 Click **Lock** in the ribbon.
The following message is displayed



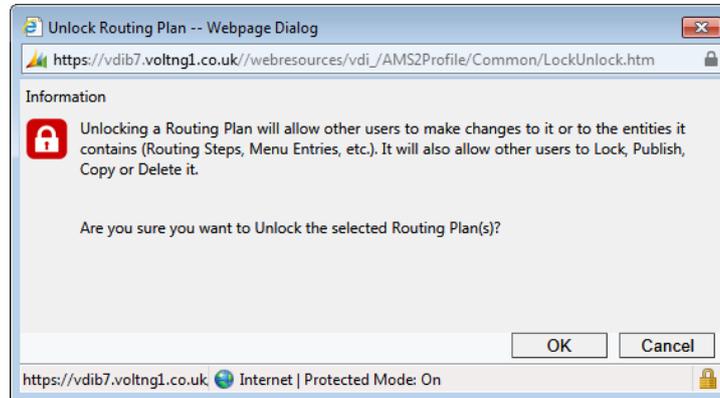
- 4 Click **OK**

A yellow bar appears on the Routing Plan to notify you that the Routing Plan is locked:



- 5 When you no longer need the Routing Plan to be locked, click **Unlock** in the ribbon.

The following message is displayed:



- 6 Click **OK**
- 7 Publish the Routing Plan to make it available for use. Refer to chapter 6.7, [Publishing a Routing Plan](#)

6.10 Editing a Routing Plan

To edit a Routing Plan, proceed as follows:



You can also edit a Routing Plan from its map. Refer to chapter 6.6, [Viewing the Routing Plan Map](#)

- 1 Lock the Routing Plan, as described in chapter 6.9, [Locking and Unlocking a Routing Plan](#).
- 2 Edit the Routing Plan as required, then click **Save** in the ribbon
- 3 Unlock the Routing Plan, as described in chapter 6.9, [Locking and Unlocking a Routing Plan](#).
- 4 Publish the Routing Plan to make it available for use. Refer to chapter 6.7, [Publishing a Routing Plan](#)

6.11 Deleting a Routing Plan

To delete a Routing Plan, proceed as follows:



Use caution when deleting a Routing Plan, as the deletion cannot be reversed.

- 1 Lock the Routing Plan, as described in chapter 6.9, [Locking and Unlocking a Routing Plan](#).

- 2 Click **Delete** in the ribbon
A confirmation window is displayed
- 3 Click **OK**.

6.12 Copying a Routing Plan

In some cases it is quicker to copy and then modify an existing Routing Plan than it is to create a Routing Plan from scratch. The new copy must be published before it can be used.

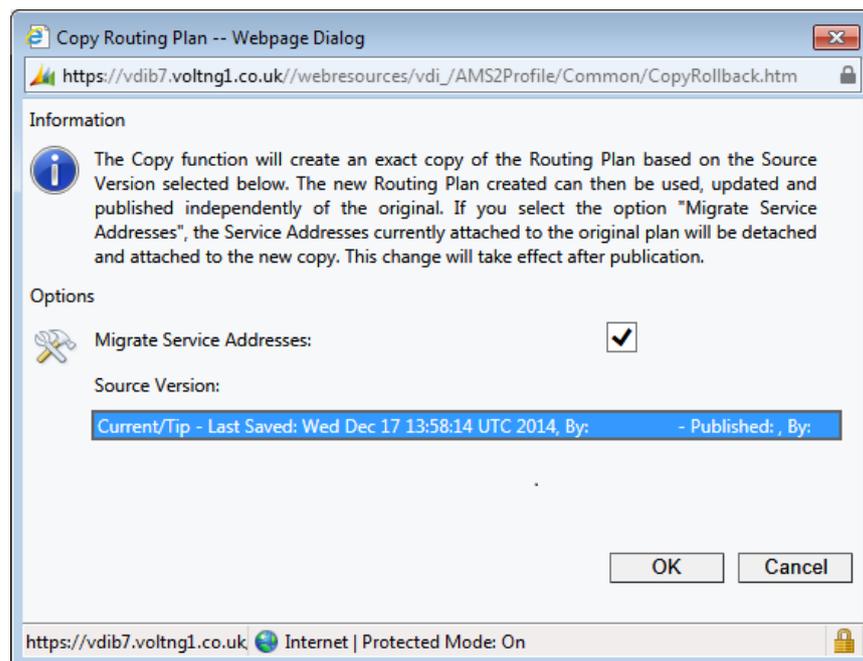
To copy an existing Routing Plan, proceed as follows:

- 1 Lock the Routing Plan that you want to copy. For details, refer to chapter 6.9, [Locking and Unlocking a Routing Plan](#).

When the lock function is applied, the Copy icon becomes available in the ribbon

- 2 Click **Copy** in the ribbon.

The following message is displayed



- 3 If you want to migrate the Service Addresses of the original Routing Plan to the copy, select **Migrate Service Addresses**. The Service Addresses will be removed from the original Routing Plan
- 4 Click **Ok**

A new dialog is displayed for the copy. The copy is automatically named *Name_Copy_Vn*, where *Name* is the name of the original

Routing Plan, and n is the Published Version Number from the original Routing Plan

- 5 Make required changes to the copy of the Routing Plan, then click **Save** in the ribbon
- 6 Unlock the copy of the Routing Plan and the original Routing Plan
- 7 Publish the copy of the Routing Plan, refer to chapter 6.7, [Publishing a Routing Plan](#). If you have migrated the Service Address, the source Routing Plan should also be republished.

6.13 Routing to Another Business Unit

Upon arrival, calls are directed for handling to a specific Business Unit based on the Service Address that matches the Address of the call. The Business Unit that receives the calls is known as the “Ingress Business Unit.” In most cases, a call is handled directly in that Ingress Business Unit where an appropriate Routing Plan is executed.

For cases where the Ingress Business Unit is a Reseller or Contact Operation, the Ingress Business Unit might not want to handle the call directly at that level but rather redirect the call to another Business Unit lower in its organizational hierarchy, typically a Contact Centre Business Unit. The Business Unit targeted by the redirection is called the “Redirection Business Unit.”

To set up redirection for a Service Address, do the following:

- 1 For the Ingress Business Unit, select **Multi Media Routing → Service Address**.
- 2 Open the dialog for the Service Address for which you want redirection to occur

- In the Redirection Business Unit field, specify the name of the Redirection Business Unit.

Service Address
Incomingpabu2

Routing Plan
Incoming Agent

General

Name * incomingpabu2 Business Unit PABU2CTOP1

Service Address * 8884441020

Address Lookup * 8884441020@vdrpa1cdscluster.rent11.pri

Translation Address *

Outbound Originating Service Address Mode

Outbound Call Barring List

Outbound Originating Service Address

Originating Black List

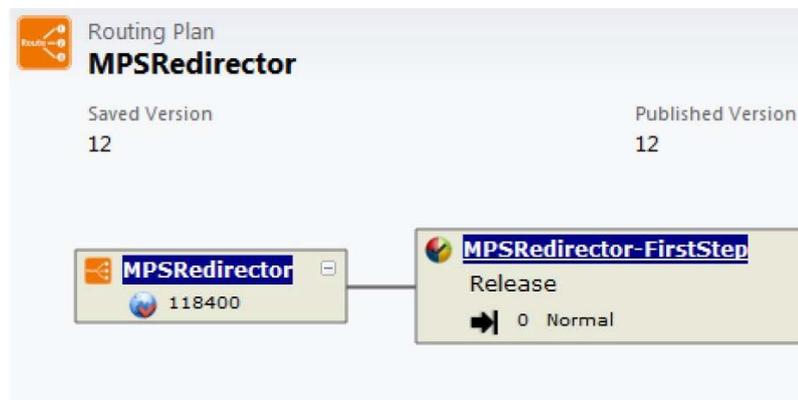
Redirection Business Unit **colin_business_unit**

Status **Active**

- Click **Save & Close** in the ribbon.
- For the Ingress Business Unit, create a “dummy” Routing Plan and assign to it the Service Address containing the redirection



This Routing Plan will never actually be executed. Its sole purpose is to make the redirection Service Address known within the Ingress Business Unit. The Routing Plan need only contain the Service Address, and no Routing Steps are necessary (apart from the Release step, which is always added by default). A Routing Plan map for such a Routing Plan appears similar to the following.



- Publish this Routing Plan for the Ingress Business Unit, refer to chapter 6.7, [Publishing a Routing Plan](#).

- 7 For the Redirection Business Unit, create a new Service Address that matches the dialed digits



If the Service Address in the Ingress Business Unit specifies a Translation Address then the Service Address in the Redirection Business Unit must match on the translated address instead of the original address.

- 8 For the Redirection Business Unit, assign the new Service Address to a real Routing Plan that will carry out the required operations for the call



A Redirection Business Unit can also be configured to further redirect to an even lower Business Unit. This is achieved using the same steps as described in this chapter.

6.14 Routing for E-mail and Web Chat

E-mail and web chat Routing Plans must be tailored to handle the case where no Agents are logged in to handle the requests. For e-mail, the messages must be preserved for the next suitable Agent who logs in, and for Web chat, a message must be displayed to inform customers when no Agent is available for chat.

6.14.1 Configuring E-Mail Routing

E-mails and SMS e-mails are transferred to an e-mail “error” queue in the ContactTracker in the following circumstances:

- No agent is logged on to the queue
- Agents are logged on but no agent is available within the configured Maximum Queue Time value (this value is explained in the text that follows)
- Agents are logged on and available, manual acceptance is configured, an e-mail is “ringing” at a position but the Agent does not answer within the configured Accept Timeout time (this value is configured on the Classification dialog, in the Call Distribution System—Queue section)

To configure e-mail routing, proceed as follows:

1. Have your System Host Administrator create an error queue in the ContactTracker CRM for each e-mail queue to retain e-mail

messages that cannot be routed to an agent. (The error queue is created through **Settings → Business Management → Queues.**)



Make sure that you have a copy of the exact spelling of the error queue name..

The following figure shows an example error queue:

The screenshot shows a configuration window for a queue named "oasis02-routing-error". The window has a menu bar with "File", "Save and Close", "Approve E-mail", "Reject E-mail", "Actions", and "Help". On the left, there is a navigation pane with "Information" (General), "Related", "Common" (Audit History, Contact Tracker Properti...), and "Processes" (Workflows, Dialog Sessions). The main area is titled "Queue: oasis02-routing-error" and contains the following fields:

- General**
 - Queue Name*: oasis02-routing-error
 - E-mail: [empty field]
 - Owner*: mca system-user
 - Description: Queue for emails from queue oasis02 that could not be delivered to an agent
- Incoming E-mail**
 - Convert to e-mail activities*: All e-mail messages
- E-mail Access Configuration**
 - E-mail access type - Incoming*: None
 - E-mail access type - Outgoing*: None

At the bottom left, the status is "Status: Active".

2. Open the dialog for the Agent e-mail Queue (not the error queue mentioned in step 1.) In the Call Distribution System—Queue section of the Queue dialog, set “Allow Queue When Queue Closed?” to **Yes**.
3. Do one of the following:
 - Display the dialog for the Classification used by the e-mail. In the Call Distribution Service—Queue section, set “Maximum Queue Time” to the maximum amount of time you want to allow e-mail calls to queue, regardless of whether Agents are logged in.
 - Display the dialog for the Queue Routing Step used by the e-mail. Click the **Set Call Profiling Parameter** icon in the ribbon to display the Call Type dialog, where the “Maximum Queue Time” value can be set.

The e-mail will exit the Queue Routing Step via the relevant Event, based on the specified conditions. For example, e-mail can be configured to queue for at least 6 hours even if no Agent is logged on to the queue at the time. Also, if Agents log on subsequently and do not service the e-mail, the e-mail

continues to queue until the other conditions are reached (Maximum Queue Time) or an Agent eventually takes it. When the other conditions are reached, a Call-Back application can process the e-mails.

4. Create an application with the following properties, as described in chapter 7.5.3.2, [Creating a New Application](#).
 - In the Name field, enter text to indicate that this is a Multi-Media Callback application.
 - For the Application Type selection, choose **Multi-Media Call Back**.
5. In the Queue Routing Step for the Agent e-mail queue, click the **Default Next Step** field.

The screenshot shows the configuration interface for a routing step named 'Handle Email-FirstStep'. The interface includes a header with the step name, a 'Routing Steps' dropdown, and fields for 'Routing Plan' (Handle Email), 'Saved Version' (2), and 'Updated' (No). The 'General' section contains the following fields:

- Name**: Handle Email-FirstStep
- Business Unit**: PABU2CTOP1
- Type**: Queue
- Default Next Step**: Handle Email-FirstStep-DefaultRoutingStep (highlighted with a red box)
- Route To Queue**: emailqueue
- Queue Business Unit**: pabu2cc1

The 'Events' section is partially visible, showing a table with columns for 'Name' and 'Follow On Routing Step'. The status at the bottom is 'Active'.

The dialog for the routing step is displayed:

Routing Step Routing Steps

Email Oasis02 MMR Callback

Routing Plan: **Handle Email** Saved Version: 2 Updated: No

General

Name * Business Unit *

Type

Default Next

Route To Application

Application *

Parameters

CRM Failure Queue

Message

Status **Active**

6. Edit the Routing Step properties as follows:

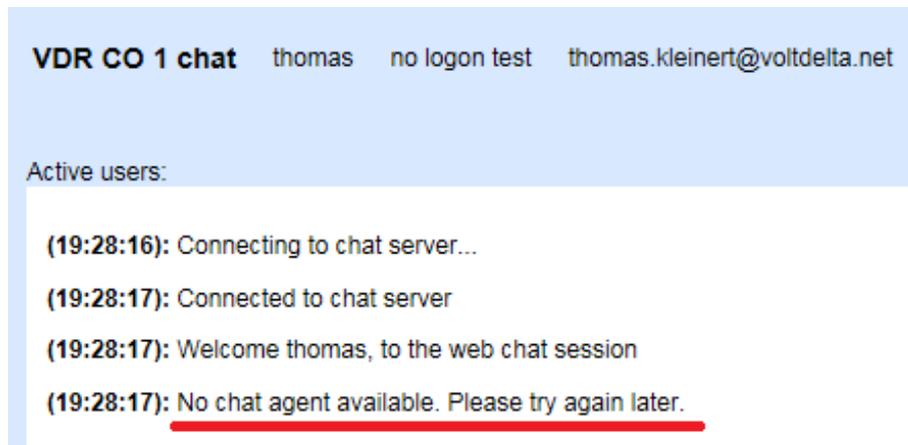
- For the Type, select **Application**.
- In the Application field, select the application you created in step 4.
- In the CRM Failure Queue field, enter the name for the e-mail error queue that was created in step 1. The spelling must exactly match the name given to the error queue

6.14.2 Chat Session

A chat session should display a message to customer users in the following circumstances:

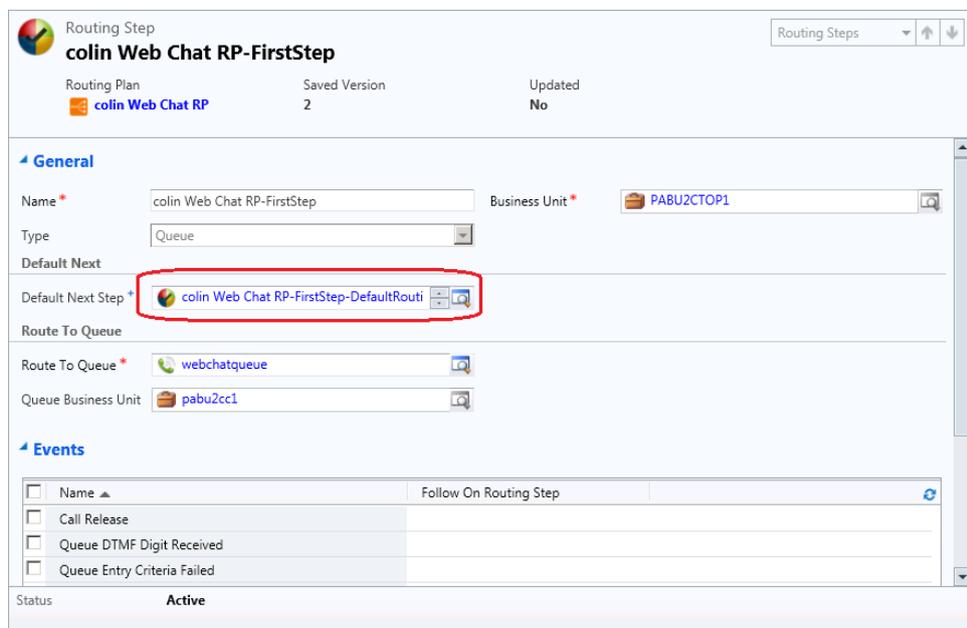
- No agent is logged on to the queue
- Agents are logged on but no Agent is available within the configured “Maximum Queue Time.” (This value is configured on the Classification dialog, see chapter 3, Classifications, Queues and Combined Call Types)
- Agents are logged on and available, manual acceptance is configured, a chat interaction is “ringing” at the Agent position but the Agent does not answer within the configured “Accept Timeout” value. (This value is configured on the Classification dialog, see chapter 3, Classifications, Queues and Combined Call Types)

The figure below shows an example of such a message.



To configure chat routing, proceed as follows:

1. Create an application with the following properties, as described in chapter 7.5.3.2, [Creating a New Application](#)
 - In the Name field, enter text to indicate that this is a Multi-Media Callback application.
 - For the Application Type selection, choose **Multi-Media Call Back**.
2. In the Queue Routing Step for the Agent chat queue, click the **Default Next Step** field.



The dialog for the routing step is displayed:

Routing Step
colin Web Chat RP-FirstStep-DefaultRoutingStep

Routing Plan: colin Web Chat RP | Saved Version: 1 | Updated: No

General

Name: Web Chat MMR Callback | Business Unit: PABU2CTOP1

Type: Application

Default Next Step: [Empty]

Route To Application

Application: chat MMR Callback

Parameters

CRM Failure Queue: [Empty]

Message: No Agents are currently available for chat. Please try back later.

Status: Active

3. Edit the Routing Step properties as follows:

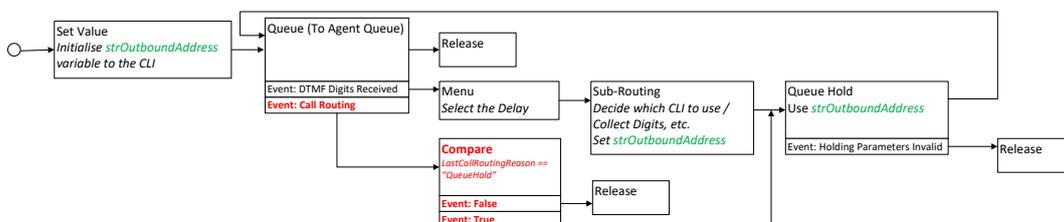
- For the Type, select **Application**.
- In the Application field, select the application you created in step 1
- In the Message field, enter the text to display to users when no Agent is currently available to handle a chat request.

6.15 Routing for Queue Hold and Scheduled Calls

Queue Hold and Call Scheduling require specific Routing Plans so the calls are handled as expected.

6.15.1 Queue Hold

For Incoming Calls, a typical Routing Plan using the Queue Hold Feature has the following basic structure. Please note that this flow is for the handling of the Queue Hold feature itself and can be embedded into a wider plan:



The Routing Plan places the Call into the Agent Queue. The Agent Queue is typically configured to receive Service Announcements informing the

Caller which DTMF Digit they can press to invoke the Queue Hold Feature (this specific announcement would typically be given only after the Caller has spent some time in the queue to ensure it is not invoked when the waiting time is short).

Once the Caller presses the configured DTMF key, the Call exits the Agent Queue Routing Step via the Event DTMF Digit Received. This leads to a Menu Routing Step allowing the user to select:

- 1- The desired Delay
- 2- An alternative Call Back number if required.
- 3- A DDI Number if required.

Eventually, a Queue Hold Routing step is invoked. The operations above would typically be placed inside a Subroutine.



Available call-back times for delayed call-back are limited to the near future (e.g. 2 hours max) in order to avoid calls staying at the CDS for too long.

Please note that the Queue Hold Routing Step is invoked in all cases, even if the Delay is 0 (Immediate). The Queue Hold Routing Step releases the Caller's Leg (if it is still on the Call), makes sure the Call Back information is available in the Call Context and places the call on hold.

Once the holding time is complete, the Routing Plan exits the Queue Hold Routing Step via the Default Next Routing Step (this happens immediately if the Holding Delay is 0) which typically places the call back into the Agent Queue Routing Step for presentation to an Agent.



If contact tracking is enabled, a new phone call activity object is created on call arrival at SST. When the call is dropped by the agent (and this does not necessarily mean a Relinquish) the phone call activity will be written and closed as for a regular incoming call.

Once it has been presented to an Agent, the Agent may carry out the Call Back successfully and Release the Call. If the Agent is not able to successfully deliver the Call Back (Number busy, ringing no answer), they may choose to re-schedule it for a short while in the future. In this case, the execution exits the Queue Routing Step via the Call Routing Event (indicating that the Agent that handled the call needs further routing services i.e. here a return to Queue Holding with a new delay). The Routing Plan places the Call back into the Queue Hold Routing Step.

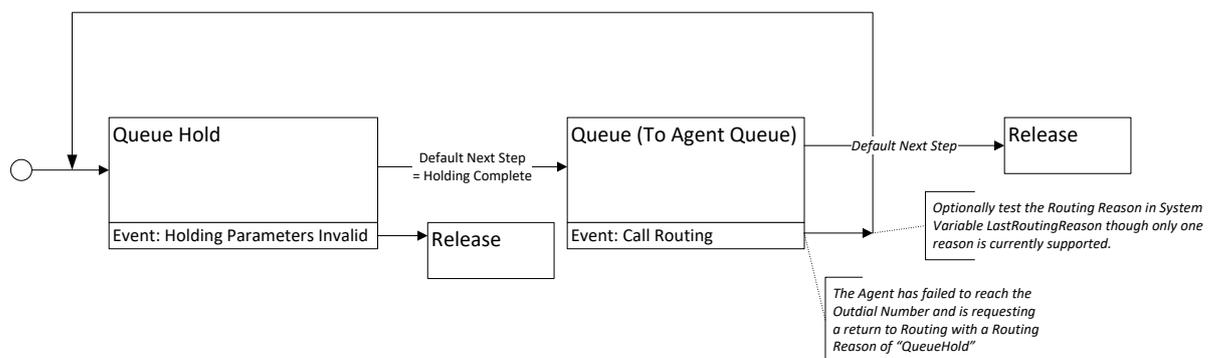
6.15.2 Scheduled Calls

6.15.2.1 Overview

Scheduled Call are calls previously scheduled using the System Call Scheduler of Management Portal (See chapter 8, [System Call Scheduler](#) for details)

6.15.2.2 Routing Plans

For Incoming Calls, a typical Routing Plan using the Scheduled Calls Feature has the following basic structure. Please note that this flow is for the handling of the Scheduled Call feature itself and can be embedded into a wider plan:



The Scheduled Calls Routing Plan immediately places the call into the Holding Queue. The Holding Delay at this stage is always the difference between the Scheduled Time from the System Call Scheduler and the time now. This value is calculated by MMR at the time it executes the Queue Hold Routing Step. As such, the Delay field is left empty on the Queue Hold Routing Step Form.

Upon completion of the Holding period, the Routing Step exits via the *Default Next Step* and the Routing Plan places the Call into the Agent Queue for presentation to an Agent.

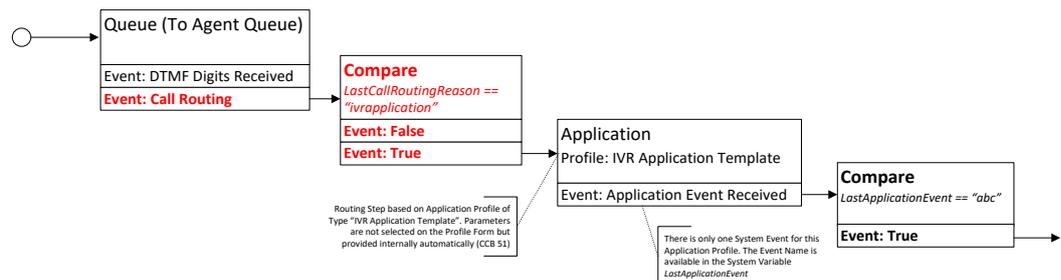
If the Agent has been unable to carry out the Outbound Call and wishes to send the Call back to the Holding Queue for a short period (e.g. less than 2 hours), it sends the Call back to MMR after having populated the re-routing reason and the new Delay.

Back in the Routing Plan, the Call exits the Queue Routing Step via the *Call Routing* Event (See Chapter 7.5.11, [Queue](#)) and the System Variable `LastCallRoutingReason` is available for assessment (using a Compare Step – see Chapter 7.5.4, [Compare](#)). The Call is immediately sent back to the Queue Hold Routing step and the cycle repeats.

6.16 Routing for Blind Transfer to IVR

Blind Transfer to IVR require specific Routing Plans so the calls are handled as expected.

A typical Routing Plan supporting the Transfer to IVR feature has the following basic structure. Please note that this flow is for the handling of the Transfer to IVR feature itself and can be embedded into a wider plan:



For details on the Application Profile Type *IVR Application Template*, please see chapter 7.5.3, [Application](#)

The feature also requires the assignment of IVR Applications to the Classification of the Call

Call Type
FC-Test1

Business Unit: **FC-CO** Saved Version: **5** Published Version: Type of Call Type Classification

Queues for call transfers Active Queues Non-Template Lookup Search for records

<input type="checkbox"/> Name ▲	Business Unit	Type of Call Type	Saved Version
<input type="checkbox"/> Auto01-RocketLawyer-Queue-TechSupport	FC-CO	Queue	9
<input type="checkbox"/> Auto04-RocketLawyer-Queue-Others	FC-CO	Queue	8

1 - 2 of 2 (0 selected) Page 1

IVR Applications IVR Applications Lookup Search for records

<input type="checkbox"/> Name ▲	Business Unit
<input type="checkbox"/> Back End Payment	FC-CO
<input type="checkbox"/> Account Balance Announcement	FC-CO

1 - 2 of 2 (0 selected) Page 1

Outbound

Connect to Parties: **A and B Parties** Outbound CLI: **118**

6.16.1 Queue Routing Step Event: Call Routing

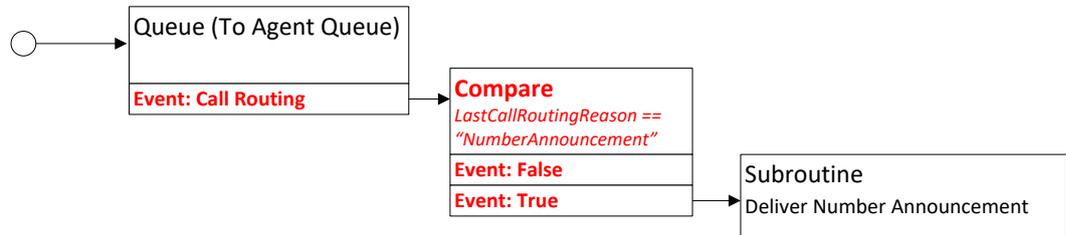
The Queue Routing Step Event: Call Routing must be handled by the Routing Plan and the System Variable *LastCallRoutingReason* assessed for a value of “IVRApplication” before the IVR Transfer is invoked.

6.17 Routing for Number Announcement

Number Announcement is a backend services that can be invoked by Agents to provide the Caller with Automated Number Announcement and optional Call Completion services. This is typically related to Directory Assistance services.

To support the Automated Number Announcement and Call Completion services as invoked by the Agent, specific Routing Plan steps must follow the Call Routing Event of the Queue Routing Step.

A typical Routing Plan supporting the Automated Number Announcement service has the following basic structure. Please note that this flow is for the handling of the Automated Number Announcement feature itself and can be embedded into a wider plan:



6.17.1 Queue Routing Step Event: Call Routing

The Queue Routing Step Event: *Call Routing* must be handled by the Routing Plan and the System Variable *LastCallRoutingReason* assessed for a value of “NumberAnnouncement” before the Number Announcement Subroutine is invoked. This makes it possible for single Routing Plan to support *Queue Hold*, *Blind Transfer to IVR* and *Automated Number Announcement* in the same plan is required.

The Subroutine delivering the Automated Number Announcement and/or Call Completion Service can be completely customized to deliver the service required. Example flows including the interactions with the system’s settings and runtime states are available from Volt R&D upon request.

One of the key elements of the Number Announcement call flow is the use of the System Media Prompt of Type *Alphanumeric String* which carries out the audio announcement of the telephone number. This is detailed in chapter 10.4.5, Alphanumeric String Media Prompts.

7 Routing Steps

7.1 Overview

This chapter includes the following chapters on Routing Steps:



For information about Routing Plans, refer to chapter 6, [Routing Plans](#).

- About Routing Steps
- Common Routing Step Properties
- Editing an Event for a Routing Step
- Specific Routing Step Details



For information about Routing Plans, refer to chapter 6, [Routing Plans](#).

7.2 About Routing Steps

A Routing Plan consists of one or more Routing Steps that are executed sequentially to direct a call in a specific way. A variety of Routing Step types is available to accommodate the functions that must be applied to the call at a given stage in the routing process. You must configure the Routing Steps to achieve the desired routing behavior.

The Routing Steps properties are described in the following chapters:

- Common Routing Step Properties—Describes fields that are common to all types of Routing Steps. Configure these fields first and then configure the fields that are specific to the Routing Step type.
- Specific Routing Step Details —Describes fields for configuring specific types of Routing Steps and information for using the steps in a Routing Plan.

7.3 Common Routing Step Properties

Several fields and properties are common to types of Routing Steps. These are described in the following chapters

Other fields that are unique to a specific type of Routing Step are described in chapter 7.5, [Specific Routing Step Details](#).

7.3.1 Identification Fields

The Identification fields are used to identify the name of the Routing Step and to define the type of Routing Step. These fields apply for all Routing Steps.

The Figure and Table below show and describe these Identification Fields.

Field	Description
Name	The name of the Routing Step
Business Unit	The Business Unit of the Routing Step
Type	The type of the Routing Step. The Type determines the action taken when the Routing Step is encountered. This selection also determines the other items that will become available to configure on the dialog. Please refer to chapter 7.5, Specific Routing Step Details

7.3.2 Default Next Step Field

The Default Next Step field specifies the next Routing Step that will be executed if an Event or other Follow-On Routing Step is not selected. For example, for an Announcement (which has no events), Default Next Step is the Routing Step to execute following completion of the Announcement.

Default Next Step appears for most Routing Step types except where specified otherwise in chapter 7.5, [Specific Routing Step Details](#).

The figure below shows the Default Next Step field:

7.3.3 Reclassification Fields

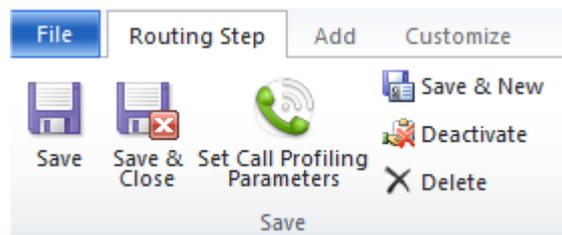
Reclassification allows a new Classification and/or Service Provider to be assigned to the call when this Routing Step is executed.

The Reclassification fields are displayed for all types of Routing Steps except Time of Day and Release.

The figure below shows the Reclassification fields:

7.3.4 Set Call Profiling Parameters Dialog

The Set Call Profiling Parameters dialog allows a Routing Step to override certain attributes that are normally defined by the current Classification. To set Call Profiling Parameters, click **Set Call Profiling Parameters** icon in the Routing Step tab of the ribbon, as shown in the figure below:.



The Set Call Profiling Parameters dialog is the same as that for a Classification (refer to chapter 3.4.1, Creating a Classification, but with a reduced set of properties displayed. These are the properties that can be set when the Routing Step is executed.

The Figure and Table below shows and describe the Set Call Profiling Parameter fields that appear in the General area:

Field	Description
Name	Already completed Management Portal; not editable
Created From	Indicates the Classification from which the form takes its default property values; not editable

Field	Description
Type	Already set to Classification; not editable.
Description	Enter a description for this set of properties (optional).

The remaining values in the dialog can be changed or left as the default settings as specified by the Classification. Only parameters that are modified are shown in the Set Call Profiling Parameters table of the Routing Step dialog.

Shown In the following figure **12345** was entered for Valid DTMF Digits in the Set Call Profiling Parameters dialog:

When the Set Call Profiling Parameters dialog is saved, this entry is subsequently displayed in the Set Call Profiling Parameters table of the Routing Step dialog, as shown in the figure below:

Property Name	Description	Property Value	Display Value	Name
<input type="checkbox"/> Call Treatment Language	The language to use for call treatments such as announce...	fafd10c5-05b9-e...	French	CDSTreatmentLa...
<input type="checkbox"/> Call Treatment Language	The language to use for call treatments such as announce...	fafd10c5-05b9-e...	French	evxLanguageID

If you want the Call Profiling Parameter to apply for the remainder of the call, set the Persistent Flag. To do so, select the checkbox to the left of the Call Profiling Parameter, and then click **Edit** in the ribbon. The Routing Step Property Override dialog is displayed, as shown in the figure below. Set the Persistent Flag to yes to enable the override to take effect until the call ends.

Routing Step Property Override
CDSTreatmentLanguage

Routing Step Property Over... ↑ ↓

General

Name * CDSTreatmentLanguage Business Unit PABU2CTOP1

Property Name * Call Treatment Language

Description The language to use for call treatments such as announcements.

Property Value * fafd10c5-05b9-e311-b981-e83935c432fc Display Value French

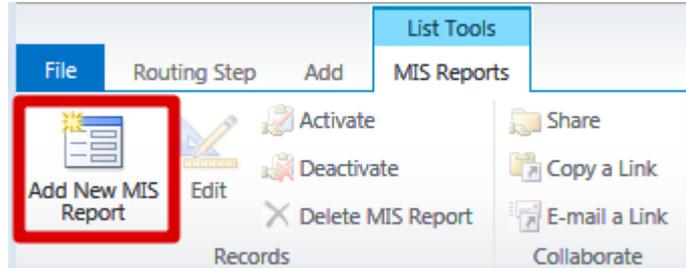
Persistent Flag No Yes

7.3.5 MIS Reports

MIS Reports are discrete elements of MIS data that can be generated and sent to the MIS Sub-system at every Routing Step. These are typically used to report to the MIS that a particular event has taken place or completed.

7.3.5.1 Adding a MIS Report to a Routing Step

To add a MIS Report to a Routing Step, click on the MIS Report menu and select *Add New MIS Report* in the ribbon.



A form is displayed as follows:

MIS Report
New

MIS Reports ↑ ↓

Routing Step FC-RLA

General

Name * DA MIS Report Business Unit *

Type Announcement

Announced Number strNumber

Connection Offered

Connection Accepted

Field	Description
Name	The name of the MIS Report being created.
Type	The type of Report: <ul style="list-style-type: none"> • Announcement Used to report and Number Announcement and Connection activities. • IVR Interaction Used to report any kind of interaction of the Caller with the Routing Plan. This type of MIS Report is generic and highly dependent on the Call Flow.

7.3.5.2 MIS Report Type: Announcement

Please see above for a view of this form.

Field	Description
Announcement Number	The telephone Number that has been announced by the Routing Plan.
Connection Offered	A tick to report that a connection to the number has been offered to the caller.
Connection Accepted	A tick to report that the connection offer has been accepted by the caller.

7.3.5.3 MIS Report Type: IVR Interaction

The Routing Plan Interaction form is as illustrated below.

The screenshot shows a web form for creating a MIS Report. The form is titled "General" and contains the following fields:

- Name ***: Text input field containing "DA MIS Report".
- Business Unit ***: Dropdown menu field.
- Type**: Dropdown menu field with "Routing Plan Interaction" selected.
- IVR Interaction** section:
 - Routing Step Information**: Text input field.
 - User Information**: Text input field.
 - Audit Data 1** through **Audit Data 10**: Ten text input fields arranged in two columns of five.

Field	Description
Routing Step Information	Routing Step Information to allow the MIS Analyst to identify the Routing Step issuing the Report. This is typically set to the Routing Step Name or location in the Routing Plan.
User Information	Free format User Information
Audit Data 1 to 10	10 free format strings to report on the activities of the Routing Plan. The value in the various fields are typically agreed upon at the time the application is designed.

7.4 Editing an Event for a Routing Step

For Routing Steps that have Events, you must define the Events and the Follow on Routing Steps, as follows:

- 1 Display the applicable Routing Step.
- 2 Click the Refresh icon in the Events table to display the available events for this Routing Step
- 3 To edit an Event, click the Event in the Events table
- 4 The check boxes next to the Events enable you to select an Event for editing. The available Events will vary, depending on the type of step that was selected.

The image that follows shows the Events for a Queue Routing Step.

<input type="checkbox"/> Name ▲	Follow On Routing Step
<input type="checkbox"/> Call Release	Event-Call Release
<input type="checkbox"/> Call Routing	
<input type="checkbox"/> Queue DTMF Digit Received	Event-Queue DTMF Digit Received
<input type="checkbox"/> Queue Entry Criteria Failed	Event-Queue Entry Criteria Failed
<input type="checkbox"/> Queue has Closed (Last Agent Logged Out)	Event-Queue has Closed (Last Agent...
<input type="checkbox"/> Queue is Closed (No Agents)	Event-Queue is Closed (No Agents)
<input type="checkbox"/> Queue Maximum Time Reached	Event-Queue Maximum Time Reached

- 5 Select the check box next to an Event and then click **Edit** in the ribbon.

The Routing Step Details dialog is displayed for the Event, similar to the figure that follows

The screenshot shows a 'Routing Step Event' configuration window for 'Call Release'. It is associated with the 'myMSRoutingPlan2' Routing Plan and the 'Greeting Menu-DefaultRouting' Routing Step. The 'General' section contains the following fields:

- Name ***: Call Release
- Business Unit**: PABU2CTOP1
- Routing Step Event Type ***: Requeue On Release-RTQ
- Follow On Routing Step**: (Empty)

The status at the bottom is 'Active'.

- 6 Edit the fields as appropriate, using the following table as a guide:

Field	Description
Name	Name of the Routing Step. The name is given by the OASIS system and it is recommended to leave it as given. Optionally, the name can be changed to make the event more meaningful within the context of the routing. For example, Queue DTMF Digit Received could be renamed Voice Mail Requested to signify that the caller has pressed the key for the DTMF queue to invoke voice mail.
Business Unit	The Business Unit to which the Event belongs.
Routing Step Event Type	Do not change this.
Follow On Routing Step	The Routing Step the Routing Plan should follow with when the Event triggers. You can select an existing Routing Step or create a new one.

- 7 Click **Save & Close** in the ribbon
- 8 Repeat steps 5 through 7 for each Event that you want to define for the step
- 9 Click **Save** in the ribbon for the routing step

7.5 Specific Routing Step Details

The following chapters describe the configuration for each specific type of Routing Step. Items common to all Routing Steps are described in Chapter 7.3, [Common Routing Step Properties](#) are not mentioned unless necessary.

The selection made in the “Type” field of the Routing Step dialog defines the type of Routing Step and, consequently, the fields that are displayed.

The Routing Step types are as follows:

Routing Step Type	Description
Agent DDI Queue	Transfers of the call to a private Agent Queue.
Announcement	Plays an audio announcement to the caller.
Application	Routes the call to a Voice Application on an IVR, Web-service or Mult-media Call-back.
Call Data	<i>Reserved for future use.</i>
Collect Digits	Collects DTMF digits from the Caller.
Compare	Allows call to be routed according to the value of a system variable, dynamic variable or a queue parameter.
Enable Feature	Enables features on the call before proceeding to the next Routing Step.
Menu	Routes the call based on the caller's DTMF response to a menu played by an Announcement.
Originating Address Lookup	Branches a Routing Plan based on the Originating Address (CLI).

Routing Step Type	Description
<p>Bulk Loading of CLI in the Originating Address Lookup</p> <p>When required, it is possible to bulk upload an existing list of CLI entries to be used by this Routing Step. Please contact Volt Delta Customer Support for a detailed procedure if required.</p> <p>Outbound</p>	<p>Makes a call to the requested destination.</p>
Queue	Send the call to a Queue and handle all the Queue-related Events.
Queue Hold	Places the Call into a Holding Queue to be re-presented to an Agent at a later time.
Release	Releases the call.
Route List	Distributes calls to one or more route lists using load balancing or linear searches.
Routing Plan	Transfers Routing control to another Routing Plan.
Set Values	Allows the value of certain variables to be set.

Routing Step Type	Description
Subroutine Call	Invokes a Subroutine
Subroutine Return	Returns form a Subroutine Plan to the Calling Routing Plan.
Time of Day	Branches the Routing Plan based on the time of day and special days of the year.
Voice Mail	Plays a Voice Mail greeting and records a Voice Mail.

7.5.1 Agent DDI Queue

An Agent DDI Queue Routing Step triggers the transfer of the call to a private Agent Queue based on the number that was dialled to reach the service. By specifying multiple Service Addresses, a single Agent DDI Queue Routing Step can be used to route to multiple Agent Queues within a Call Centre.

For information on creating and using Agent Queues, refer to chapter 14, [Personal Agent Queues](#).

The figure below shows the Agent DDI Queue Routing Step dialog.

The screenshot displays the 'Agent DDI Queue' configuration dialog. At the top, it shows the routing step name 'Agent DDI Queue' and its status (Saved Version 13, Updated No). A yellow warning banner indicates the record is locked by 'User: Andy Parent tenant Administrator AccountNow CC'. The 'General' section contains fields for Name (Agent DDI Queue), Business Unit (AccountNow), Type (Agent DDI Queue), and Default Next Step (Agent DDI Andy Test-DefaultRoutingStep). The 'Agent DDI' section includes Agent Business Unit (PhoenixCC) and Agent Extension (%immriastagentqueue%). The 'Events' section features a table with columns for Name and Follow On Routing Step.

Name	Follow On Routing Step
Agent DDI Not Allocated	
Call Release	Agent DDI Queue
Call Routing	
Queue DTMF Digit Received	
Queue Entry Criteria Failed	
Queue has Closed (Last Agent Logged Out)	
Queue is Closed (No Agents)	
Queue Maximum Time Reached	Queue to General Agent Queue

The Agent DDI Routing step contains one optional parameter:

Field	Description
Agent Business Unit	Optional field that specifies the Business Unit of the Agent (Used when the Agent belongs to a sub tenant).
Agent Extension	Optional field. If set, the system uses the specified value or variable instead of the DDI (dialled digits) for the Agent Extension. Special case: If this field is set to the System Variable name <code>%mmr:lastagentqueue%</code> then the call will be queued to the last Agent that handled the call.

7.5.1.1 Events

Events define possible conditions that can occur during the Routing Step. The Events area is populated with relevant Events only after you have saved the Routing Step. Once you have saved the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

The Table below describes the Agent queue events that can occur. If configured, a “Follow On Routing Step” is executed when the Event occurs

Event	Description
Agent DDI Not Allocated	The DDI received is currently not allocated to any agent.
Call Release	The call was released by an Agent or by the System after was queued and the Requeue on Call Release feature was enabled..

Event	Description
Call Routing	<p>This Event is invoked when the Client that has handled the Call is requesting that the Call be onward Routed via the Routing Plan. Please note that there are several Call Routing Reasons that can be invoked by an Agent and the Reason is available in a Routing Plan System Variable called <i>LastCallRoutingReason</i>. The following values are currently available:</p> <p><i>QueueHold</i>: The Agent has requested that the Call be onward routed to Queue Hold using the provided Delay.</p> <p><i>IVRApplication</i>: The Agent has requested that the Call be onward routed to an IVR Application using the provided Application Information.</p>
Queue DTMF Digit Received	<p>This event is triggered exactly as for a Queue Routing Step.</p> <p>If an e-mail address has been entered in the Agent Queue area of the User Record, that e-mail address will be used as the Voice Mail recipient instead of the one configured in the Voice Mail profile.</p>
Queue Entry Criteria Failed	<p>The call was not accepted in the queue as it failed the Queue entry criteria.</p>
Queue has Closed (Last Agent Logged Out)	<p>The call was queued successfully but while it was queueing, the Queue was closed because the last Agent servicing the queue logged out.</p>
Queue is Closed (No Agents)	<p>The call could not be Queued as there is no Agent logged onto this Queue and the Queue is Closed.</p>
Queue Maximum Time Reached	<p>The call was queued successfully but reached the maximum amount of time it was allowed in the Queue.</p>

7.5.2 Announcement

An Announcement Routing Step plays an audio announcement to the caller. The Announcement must be an existing Announcement entity configured with the desired audio file. (For details on how to create an Announcement, refer to chapter 10.6, [Creating an Announcement](#).)

The Figure and Table below shows and describes the Announcement Routing Step dialog fields:

The screenshot shows a 'Routing Step' dialog box for an 'Announcement' type. The title bar reads 'Error-Announcement-DefaultRoutingStep-DefaultR...'. The dialog is divided into sections: 'General' and 'Announcement'. In the 'General' section, there are fields for 'Name *' (containing 'Announce DA Number'), 'Business Unit *' (containing 'CO'), and 'Type' (set to 'Announcement'). Below this is a 'Default Next Step +' field. In the 'Announcement' section, there is an 'Announcement *' field (containing 'Announce Number') and an 'Announcement String' field (containing 'strDANumber').

Field	Description
Announcement	Audio that is played back to the caller. The Announcement must already have been published separately.
Announcement String	Alphanumeric String to announce when the Announcement contains Media Prompts of Type <i>Alphanumeric String</i> This field is typically set to a variable whose content is set previously in the Routing Plan. See chapter 10.4.5, Alphanumeric String Media Prompts for details on the Alphanumeric String Media Prompt Type.

7.5.3 Application

A Application Routing Step routes the call to a Voice or Data Application on an IVR, a Web Service or at a Multi-media call-back.

The Figure and Table below shows and describes the Application Routing Step dialog fields:

The screenshot shows the 'Routing Step' configuration window for 'AntOctVoiceApp-FirstStepx'. The 'General' section includes fields for Name, Business Unit, Type, Default Next Step, and Route To Application. The 'Events' section contains a table with columns for Name and Follow On Routing Step, and a message indicating no records are available.

Field	Description
Default Next Step	The Routing Step to use if an Application, Web Service or Multi-media Call-back indicates an unrecognised Application Outcome. Refer to chapter 7.5.3.4, Defining Events for a New Application for more information.
Application	Specifies the Application to use. Either select an existing Application or create a new one. The Application is used to define the characteristics of the Application and to prime an Application Routing Step. An Application can be used by different Routing Steps in different Routing Plans to send a call to the same IVR Application, Web Service or Multi-media Call-back. (For a description of the fields that appear when you create a new Application, refer to table in chapter 7.5.3.2, Creating a New Application .)

7.5.3.1 Events

The Events that appear in the Events table depend on the selected application. In any case, you will have to edit the Events as described in chapter 7.3.5, [Editing an Event for a Routing Step](#).

If the Application selected is of Type *IVR Application Template*, a System Event is always present:

Event	Description
Application Event Received	The IVR Application invoked via the IVR Application template based on information received from the Agent has returned an Event. The event value is available in the System Variable <i>LastApplicationEvent</i> which can be tested for when handling this Event. Please see chapter 6.16, Configuring Routing for Blind Transfer to IVR for an example Routing Plan.

7.5.3.2 Creating a New Application

To add a new Application for use with the Application Routing Step, proceed as follows

- 1 In the Application Routing Step, click the icon to the right of the Application field. Or, if you are creating an Application independent of an Application Routing Step, in the Management Portal navigation pane, select **Multi Media Routing → Applications**, then click **New**.

The Look up Record dialog is displayed.

2 Click New

The Application dialog is displayed

The screenshot shows the 'Application' dialog box for 'app_IVR'. The 'General' tab is active. The fields are as follows:

- Name ***: app_IVR
- Business Unit**: PABU2CTOP1
- Application Type ***: IVR Application
- IVR Queue Type**: System IVR
- Application Id/Script Id/URL ***: http://localhost/testIVR
- Voice File Group**: (empty)
- Parameters**: originating address, ani, classification, cid

3 Edit the fields using the information as shown in the table below:

Field	Description
Name	The name of the Application
Business Unit	The Business Unit that owns the Application
Application Type	<p>Specifies the type of application concerned:</p> <p>IVR Application: An IVR application where all the parameters are fixed on the Application form.</p> <p>IVR Application Template: An IVR application Template where the IVR Application parameters are received at runtime from the Client. This Application profile is used in the Routing Plans supporting the Transfer to IVR feature (See chapter 6.16, Configuring Routing for Blind Transfer to IVR)</p> <p>Web Service: A standard external Web-Service to look up third party call related information.</p>

Field	Description
	Multi-media Call-back: A feedback call to the Gateways which forwarded the call to MMR.
IVR Queue Type	This field only visible for the Application Type IVR Application: System IVR: The Application is provided by System (Infrastructure IVRs) Business Unit IVR: The Application is provided by dedicated IVR in the Business Unit Any: The Application is provided by an IVR servicing the specified Destination Queue .
Destination Queue	The Queue to use to route the call to the IVR. Only visible when IVR Queue Type is set to “Any”.
Application Id/Script Id/URL	The name of the application or script to execute on the IVR.  Contact a System Host Administrator to obtain this information, which is contained in the installation instruction for the IVR application The exact identifier is passed to the IVR to identify the application or script to execute. When specifying a name, use a maximum of 21 characters and do not enter the apostrophe character (').
Timeout (secs)	This field is only visible if the Type is “Web Service”. It overrides the default timeout waiting for the Web Service to reply. If the value is left empty, the default of 10 seconds is used.
Voice File Group	Overrides the Envoy Voice File Group property of the classification. Only visible when Application Type is set to “IVR Application”.

Field	Description
Parameters	<p>Enables you to specify a list of parameters for the Application. To enter multiple parameters, place a comma between each parameter.</p> <p>The table in Chapter 7.5.4, Compare Step, describes the available System Variables. You can also specify Dynamic Variables in the Parameters field.</p>

- 4 Add a Routing Step Event Dictionary item for each event, as described in chapter 7.5.3.4, [Defining Events for a New Application](#)
- 5 Click **Save & Close** in the ribbon

7.5.3.3 Input Parameters for Application URLs

The figure below shows an example URL in an Application.

The screenshot shows the configuration window for an application named 'Application-Customer Data Retrieval'. The 'General' tab is active, and the 'Application ID/Script ID/URL' field contains the following URL: `http://172.27.32.25:8001/?ANI=%mm:ani%&DNIS=%mm:dnis%&OBN=%mm:routbound address%`. The parts of the URL in red are routing plan variables. Below the URL field, there is a 'Routing Step Event Dictionaries' table with columns for 'Name' and 'Event Type'.

Name	Event Type
<input type="checkbox"/> Error	Error
<input type="checkbox"/> Success	Success

The URL parts in **red** are Routing Plan variables used to specify the Input Parameters for the Application. The table below lists the available variables and the format to use in the URL.

Variable specification in the URL	Description
%mmr:ani%	Same as above, except that the domain name is removed.
%mmr:cid%	The OASIS Call Id in Hex Format.
%mmr:classification%	The OASIS Call Type Classification in the fully qualified name format.
%mmr:dnis%	Same as above, except that the domain name is removed.
%mmr:language%	The language of the Call as set in the Classification.
%mmr:lastDTMF%	The last DTMF digit pressed during a Routing Engine menu or to exit a queue.
%mmr:originating address%	The calls originating address. (CLI)
%mmr:outbound address%	The Outbound Address for System Scheduler Outbound Calls.
%mmr:routing address%	The current routing address lookup (DNIS routing value).
%mmr:service address%	The current service address (DNIS label).
%mmr:utc%	Current UTC time as a number (Number of seconds since 01-01-1970)
%mmrd: <i>variable name</i> %	Any Dynamic variable created in the Routing Plan <i>NOTE: For additional Call Context Details, please contact VoltDelta Support.</i>

The tags in **blue** can be any string as long as they are recognised by the Application the URL is pointing to. They can also be omitted if the Service simply expects the parameters in a fixed order.

7.5.3.4 Defining Events for a New Application

When creating an Application (refer to chapter 7.5.3.2, [Creating a New Application](#)), you must also define the events for it. When an Application completes, the Application can indicate an Application Outcome, which is used to decide how to route the call next. The Application Outcome provided by the Voice Application is used to find an Event that defines the correct Routing Step to use.



The Application Outcome is returned by the Application; an application might have a set of defined events to execute; otherwise, the Default Next Step is executed.

To define Application events, proceed as follows:

- 1 Display the New Application dialog (refer to chapter 7.5.3.2, [Creating a New Application](#))
- 2 Click inside the Routing Step Dictionaries area to display the Add New Routing Step Dictionaries icon in the ribbon.



The icon appears only if the Routing Step was previously saved.

Application
IVR Menu

Applications

IVR Queue Type
System IVR

Application Id/Script Id/URL *
4027

Voice File Group

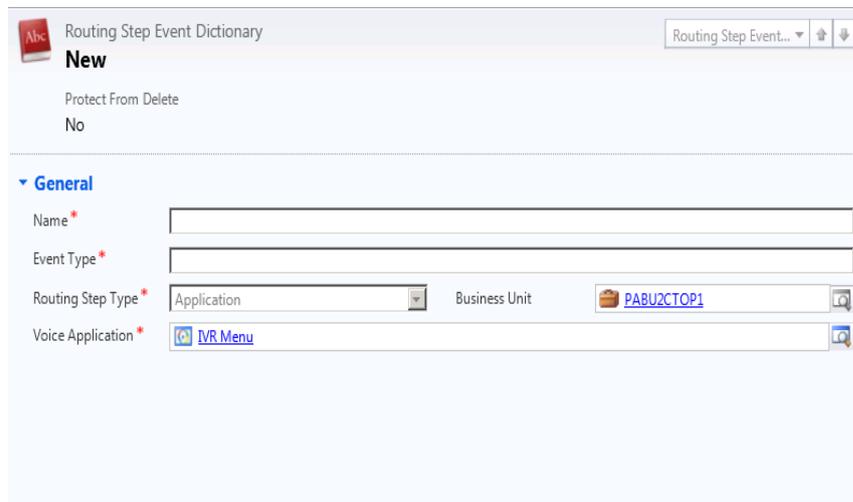
Routing Step Event Dictionaries

Name	Event Type	Created On
No Routing Step Event Dictionary records are available in this view.		

0 - 0 of 0 (0 selected) Page 1

3 Click the Add New Routing Step Dictionaries icon

The New Routing Step Event Dictionary dialog is displayed.



4 In the Name field, enter the name of the Event (name of the Application Outcome *exactly* as reported by the Application).



The name must be agreed upon with the provider of the Application, Web Service or Multi-media Call-back.

5 In the Event Type field, enter a name for the event type. This value is matched in the response from the IVR.

6 Click Save.

7 Repeat steps 2 through to 6 create a Routing Step Event for each Event defined in the profile.



The events will appear in the Events area of the Routing Step dialog after you save the Routing Step and then click the Refresh icon in the upper right corner of the Events table.

7.5.4 Call Data

A Call Data Routing Step is used to store specific data related to the call into the Call Context.

The screenshot displays the configuration for a 'Call Data' Routing Step. At the top, it shows the routing plan '11.3.PR.D.1-ER-PRD1682-Call...' and 'Saved Version 2'. The 'General' section includes 'Name' (Call Data), 'Business Unit' (FC-CO), 'Type' (Call Data), and 'Default Next Step' (Queue). The 'Call Data' section has 'Type' (Customer Data Integration), 'Operation' (Write), and 'Value' (CustomerData). Below this is an 'Events' table with one entry: 'Data Not Found' with the action 'Follow On Routing Step'.

Field	Description
Name	Name of the Routing Step. Free String
Business Unit	Standard Business Unit Field for the Routing Step
Type	Type of the Routing Step. This is set when the Step is created and then disabled.
Default Next Step	The Default Next Step is executed when the Holding Time has expired.
Type	The type of Context Data provide. The following types are supported: Customer Data Integration: External Data supplied by the customer according to the API described in <i>Customer Data Integration Service Interface – Reference [22986]</i>

Field	Description
Operation	<p>The operation to carry out on the context data:</p> <p>Append: Append the specified value to the end of the data in the specified Row.</p> <p>Clear: Clear any data from the specified Row.</p> <p>Read: Read the data from the specified Row into the specified variable.</p> <p>Write: Write the specified value into the specified Row.</p>
Value	<p>For Read operations this is the variable which will store the value of the CCB Row specified.</p> <p>For Write and Append operations this can either be a literal string or a variable name, in which case the contents of the variable will be stored in the specified Row of the CCB.</p> <p> If the value is a literal string, it must be surrounded by double quotes. The field can be used directly to store a small literal value. For longer string or XML documents, please use a variable.</p>
Row	The Row of the CCB to be used for reading, writing or deleting.

7.5.4.1 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Edit each event as described in chapter 7.3.5, [Editing an Event for a Routing Step](#).

The table below describes the events that can occur with this Routing Step. If configured, a “Follow On Routing Step” is executed when the Event occurs.

Event	Description
Data Not Found	This event is triggered is the data could not be read from the Context Buffer and written into the variable or read from the variable and written to the Context Buffer.

7.5.5 Collect Digits

A Collect Digits Routing Step is used to collect DTMF digits input by the Caller. The Routing Step integrates options to play Prompts to the Caller and to control the digits that need to be collected.

The screenshot displays the configuration interface for a 'Get Account Number' Routing Step. The 'General' section includes fields for Name (Get Account Number), Business Unit (FC), Type (Collect Digits), and Default Next Step (Queue Hold). The 'Collect Digits' section contains various settings: Welcome Announcement (Welcome), Prompt Announcement (Call-Back CLI Request), Retry Announcement, Maximum Number of Digits (11), Terminating Digits (#), Storage Variable (strCallBackNumber), Enable Barge In on Welcome Announcement (checked), Maximum Timeout (secs) (30), Interdigit Timeout (secs) (3), Retry Attempts (3), and Valid Digits (0123456789). The 'Events' section shows a table with one event: 'Digit Collection Failed'.

Field	Description
Name	Name of the Routing Step. Free String
Business Unit	Standard Business Unit Field for the Routing Step
Type	Type of the Routing Step. This is set when the Step is created and then disabled.
Default Next	The Default Next Step is executed when the Holding Time has expired.
Welcome Announcement	The initial welcome prompts announcement. This prompt is optional.

Field	Description
Prompt Announcement	The prompt to request the digits from the caller.
Retry Announcement	The announcement to play back to prompt a retry.
Maximum Number of Digits	The maximum number of digits to detect.
Terminating Digits	The terminating digits to detect the end of the digit string.
Storage Variable	The dynamic variable receiving the collected digits.
Enable Barge In on Welcome Announcement	Specifies whether Barge-in is enabled immediately on the welcome prompt.
Maximum Timeout (secs)	The maximum amount of time allowed for the caller to key-in their digits.
Interdigit Timeout (secs)	The maximum amount of time allowed between the digits before the collection is interrupted.
Retry Attempts	Maximum number of retry attempts allowed.
Valid Digits	A string of digits specifying the valid digits for the collection. e.g. to collect only digits from 0 to 5, the string "012345" would be entered.

7.5.5.1 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Edit each event as described in chapter 7.3.5, [Editing an Event for a Routing Step](#).

The table below describes the events that can occur with this Routing Step. If configured, a "Follow On Routing Step" is executed when the Event occurs.

Event	Description
Digit Collection Failed	This event is triggered if the digit collection has globally failed, for any reason. This failure would occur once the maximum number of retries has occurred.

7.5.6 Compare

A Compare Step compares a specified variable with another variable or value, returning either a True or False event. A Compare Routing Step is often used in conjunction with a Set Variable Routing Step.

The Figure and Table below shows and describes the Compare Routing Step dialog fields.

The screenshot shows the 'compare values' dialog for a routing step. The 'General' section contains the following fields:

- Name:** compare values
- Business Unit:** PABU2CTOP1
- Type:** Compare
- Default Next:** (empty)
- Default Next Step:** compare values-DefaultRoutingStep
- Compare Section:**
 - Type:** System Variables
 - Name/Value:** ANI / CLI
 - Operator:** begins with
 - Type:** Constant
 - Name/Value:** 900

The 'Events' section includes a table with the following rows:

<input type="checkbox"/> Name	Follow On Routing Step
<input type="checkbox"/> False	
<input type="checkbox"/> True	

Type	<p>The type of variable to be compared. This can be one of the following:</p> <ul style="list-style-type: none"> • System Variables • Dynamic Variables • Queue Parameters <p>Based on the Type selection, the Name/Value field will change to match the type of variable being compared.</p> <p>When the Queue Parameters value is selected, the Parameter selection field is displayed.</p>
Operator	<p>Defines the type of comparison to perform for the two values.</p>

Type	<p>This is the type of the variable or value to be compared against. This can be one of the following:</p> <ul style="list-style-type: none"> • System Variables • Dynamic Variables • Queue Parameters • Constant <p>Based on the Type selection, the Name/Value field will change to match the type of variable being compared to.</p> <p>When the Queue Parameters value is selected, the Parameter selection field is displayed.</p>
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7.5.6.1 System Variables

The table below defines the available System Variables.

System Variable	Display Name	Description
ani	ANI / CLI	Short form of the calling party address (without the <i>@serverIP</i> component)
cid	Call Id	The Call Id of the current call.
classification	Classification	The current Classification of the call.
dnis	DNIS / Called Number	The short form of the called party address (without the <i>@serverIP</i> component)
lastagentname	Last Agent Name	The name of the last Agent that handled the Call.
lastapplicationevent	Last Application Event	The last Application Event that was returned by an Application of type "IVR Application"

System Variable	Display Name	Description
lastcallroutingreason	Last Call Routing Reason	The last Call Routing Reason sent by the Agent. This value is only valid when a "Call Routing" Event has been triggered. Supported values are: <i>"QueueHold"</i> : Request for the Call to be placed into Queue Hold (See chapters 6.15, Configuring Routing for Queue Hold and Scheduled Calls and 7.5.12, Queue Hold). <i>"IVRApplication"</i> : Request for the Call to be transferred to an IVR Application specified by the Client (See chapters 6.16, Configuring Routing for Blind Transfer to IVR and 7.5.3, Application).
lastdtmf	Last DTMF Digit	The last DTMF character pressed by the caller while in queue or in a Menu step.
lastworkstationname	Last Workstation Name	The name of the last Workstation that handled the Call.
originating address	Originating Address	The full calling party address
routing address	Routing Address	The translated called party address.
service address	Service Address	The Service address name.
queuefailurereason	Not applicable	String containing the reason the last queue operation failed.
utc	Not applicable	The current time in UTC. That is, the time the CSA set the CCB to be sent to the application.

7.5.6.2 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Once you save the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

Edit each event as described in chapter 7.3.5, [Editing an Event for a Routing Step](#).

The table below describes the Compare events that can occur. If configured, a "Follow On Routing Step" is executed when the Event occurs.

Event	Description
True	The defined Follow on Routing Step is used when the Compared variables match according to the specified Operator.
False	The defined Follow on Routing Step is used when the Compared variables do not match according to the specified Operator.

7.5.7 Enable Feature

An Enable Feature Routing Step is an intermediate step which enables features on the call before it proceeds to the next Routing Step.

The Figure and Table below shows and describes the Enable Feature Routing Step dialog fields:

The screenshot shows the 'New' dialog for a Routing Step. The dialog is titled 'Routing Step New' and has a 'Routing Steps' dropdown menu. Below the title, there are three tabs: 'Routing Plan', 'Saved Version', and 'Updated No'. The 'General' section is expanded, showing the following fields:

- Name***: FC-RLA-Features
- Business Unit***: FC-CO
- Type**: Enable Feature
- Default Next**: (empty)
- Default Next Step***: (empty)
- Feature Set**: Call Release
- Agent Release**:
- System Release after Completion**:
- Trigger with no A-Party**:

Field	Description
Feature set	<p>This is the Feature set we want to enable/disable. This can be one of the following:</p> <p>Call Release: This Feature Set controls the ability to have the call returned to the Routing Plan when the call is about to be released by an Agent, or by the A or B party hanging up.</p> <p>A-Party Release: This Feature Set controls the ability to prevents the call being released when the A party hangs up while the call is going through the Routing Plan.</p>

Field	Description
Agent Release	Set this option to enable re-routing of the call after an agent releases it. The Call Release event of the Queue routing step is used to route the call. This can be used, for example, to route the caller to an IVR for a customer satisfaction survey.
System Release after Completion	Set this option to enable re-routing of the call after a party releases during the call completion phase. The Call Release event of the Queue routing step is used to route the call.
Trigger with no A-Party	Set this option to indicate that the Agent Release and System Release after Completion options apply when the A-Party has hung up.
Keep Call On A-Party Release	Set this option to prevent the Routing Plan releasing the call when the A-Party has hang up. This is useful in Queue Hold situations, where normally an announcement is played before putting the caller in the hold queue. If the caller hangs up during the announcement, with this option set the call will still be put in the hold queue.

7.5.8 Menu

A Menu Routing Step routes the call based on the caller's DTMF response to a menu played by an Announcement.

The Figure and Table below shows and describes the Menu Routing Step dialog fields:

DTMF Key	Menu Function	Description	Follow on Routing Step	Phrase Dictionary
#	Disabled			
*	Disabled			
0	Disabled			
1	Routing Step	Route to Sales	Mobile21Main-RouteToSales-RP	
2	Routing Step	Route to Support	Mobile21Main-RouteToSupport-RP	
3	Disabled			
4	Disabled			
5	Disabled			
6	Disabled			
7	Disabled			
8	Disabled			
9	Disabled			

Field	Description
Default Next Step	The Routing Step to execute next if a Follow On Routing Step for a Menu Entry is not used
Welcome Announcement	This optional Announcement is played before any other menu announcements (for example, <i>Welcome to the ABC Company service</i>). The Welcome Announcement is played only once..
Menu Announcement	Announcement that describes the menu options (for example, <i>Press 1 for Sales or 2 for Support</i>). This Announcement is repeated after a timeout occurs.

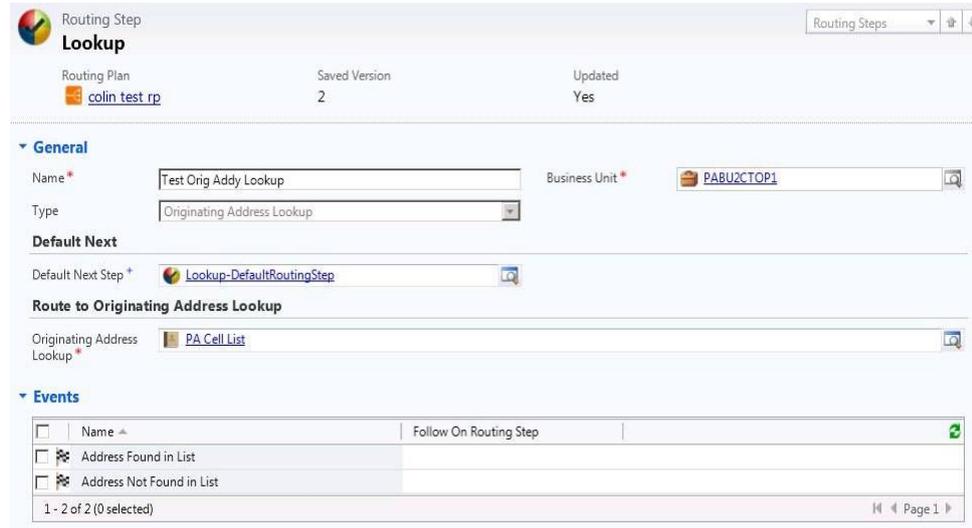
Field	Description
Menu Timeout Announcement	If a Menu Timeout Announcement or No Match Announcement is provided, the Menu Announcement is not replayed. However, if one of these announcements is not provided, the Menu Announcement will be replayed for the condition
No Match Announcement	This Announcement is played if a DTMF key is detected which is not handled. If a No Match Announcement is provided, the Menu Announcement is not replayed. If no <i>No Match Announcement</i> is provided, the Menu Announcement is replayed for the condition
Enable Barge In on Welcome Announcement	Specifies whether a DTMF key press should interrupt a Welcome Announcement.
Menu Retry Attempts	This specifies the number of times to reattempt to offer the menu after an error or timeout.
Menu Timeout (secs)	Specifies the number of seconds to wait for a DTMF key press before timing out.
Menu Entries	Defines the menu behaviour. If an entry for a DTMF digit is enabled, the Follow On Routing Step will be executed when that DTMF digit is detected.

7.5.9 Originating Address Lookup

An Originating Address Lookup Routing Step branches a Routing Plan based on the Originating Address (CLI). For example, you can define a list of blacklisted telephone numbers for the Originating Address Lookup

and then play an announcement for these numbers in the Follow on Step if a match occurs.

The Figure and Table below shows and describes the Originating Address Lookup Routing Step dialog fields



Field	Description
Default Next Step	The Routing Step to use if an unhandled event occurs
Originating Address Lookup	<p>Lookup table containing a list of Originating Addresses entries to look up. If the Calling Line Identifier (CLI) for the call matches an entry in this table then a match has occurred. If the match is handled, the “Address Found In List” event's Follow On Routing Step is used, if defined.</p> <p> The Address List must be published separately from the Routing Plan. Since the Address List can be used by multiple Routing Plans, making changes and publishing the Address List will affect all Routing Plans using the Address list even though the Plans themselves are not republished. Please see chapter 6.5.1 Publication of Address Lists for more details.</p>

The Figure and Table below shows and describes the dialog that is displayed when you create a new Originating Address Lookup (or wish to add additional Originating Addresses entries:

Field	Description
Name	The Routing Step to use if an unhandled event occurs
Business Unit	The Business Unit that owns the Originating Address Lookup Routing Step
Type	The type of Address List; for an Originating Address List, select General.
Address Entries	<p>Addresses (telephone or SIP) to match. The following optional wildcard characters are supported, either separately or together:</p> <ul style="list-style-type: none"> • *—Replaces one or more characters • ?—Replaces a single character. <p>Example entries with wildcards are as follows:</p> <ul style="list-style-type: none"> • *@abc.com • 111???2* • 012345* <p> To make an entry in this field, you must first click Save in the ribbon to display the Add New Address Entry and Add Existing Address Entry ribbon icons. Then use these icons to add address entries</p>

7.5.9.1 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Once you save the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

The table below describes the originating address lookup events that can occur. If configured, a “Follow On Routing Step” is executed when the Event occurs.

Event	Description
Address Found in List	The defined Follow on Routing Step is used when the caller's CLI is found in the Originating Address Lookup Address List.
Address Not Found in List	The defined Follow on Routing Step is used when the caller's CLI is not found in the Originating Address Lookup Address List

7.5.9.2 Bulk Loading of CLI in the Originating Address Lookup

When required, it is possible to bulk upload an existing list of CLI entries to be used by this Routing Step. Please contact Volt Delta Customer Support for a detailed procedure if required.

7.5.10 Outbound

An Outbound Routing Step makes a call from the OASIS system to a specified destination.

The Figure and Table below shows and describes the Outbound Routing Step dialog fields

Field	Description
Default Next Step	Routing Step that is executed if an event occurs that is not explicitly handled.
Outbound Route	Defines how to make the outbound call. (For a description of the fields that appear when you create a new Outbound Route, refer to the table in chapter 7.5.10.1, Creating a New Outbound Route)

Field	Description
Outbound Originating Service Address Mode	<p>Enables the outbound call to be treated as one of the following:</p> <ul style="list-style-type: none"> • Outbound Originating Address—The specific address that is defined in the Outbound Originating Service Address field. • A-Party Pass Through—The incoming ANI (CLI) is passed through when the call is routed to the outbound address. • A-Party Pass Through with Prefix & Extension—The incoming ANI (CLI) is passed through with the specified prefix prepended and the specified extension appended. The prefix and extension are defined by the “Outbound CLI Prefix” and “Outbound CLI Extension” fields on the Classification dialog. <p> The “A-Party Pass Through with Prefix & Extension” option can take effect only if the “Outbound Originating Service Address Mode” field is not populated on the Service Address dialog or the dialog for the Outbound Routing Step.</p> <p>The Outbound Originating Service Address Mode can be configured in three different areas of the Management Portal; to determine the value to apply, the software uses the following priority order:</p> <ol style="list-style-type: none"> 1. The information in the Service Address dialog 2. The information in the Outbound Routing Step dialog 3. The information in the Classification dialog

Field	Description
Outbound Originating Service Address	Specifies the address that outbound calls will purport to come from. This field is only used when the Outbound Originating Service Address Mode field is set to "Outbound Originating Address", in which case this field is mandatory.
A-Party Treatment	If specified, it will place the caller on hold until the called party answers.
Routing Option	Specifies one of the following routing options: <ul style="list-style-type: none"> • Complete on Success • Default Next (Step) on Ringing • Default Next (Step) on Answer
Outbound Address Option	Outbound Address Processing option: <ul style="list-style-type: none"> • No Treatment: The Outbound Address is left untouched (e.g. SIP Addresses) • Filter for TDM Networks: Remove all non-TDM digits or characters before dialling over a TDM network.
Valid Abort Digits	List of digits that will interrupt the out dial if detected during the ringing stage. E.g. "1234#"
Service Announcement Profile	When set, this Service Announcement Profile will override the Profile set in the classification for the duration of the outbound Call. This is primarily used to set Ringing/Announcements for the A party.
Outbound Party	Call Party to use for the Outbound call: A-Party, B-Party, User
Use Conference	Tick this to enforce the use of a Conference Bridge for the Outbound call.
Redirection Address Template	If the <i>outbound call</i> receives a redirection request and the redirection address matches this pattern, this Routing Step's [Redirection Received] event is triggered. The wildcard characters '*' and '?' are allowed.

7.5.10.1 Creating a New Outbound Route

To create a new Outbound Route, proceed as follows:

- 1 Display the Outbound Routing Step
- 2 Click the icon to the right of the Outbound Route field.
The Look Up Record dialog is displayed
- 3 Click **New** in the Look Up Record dialog
The New Outbound Route dialog is displayed

- 4 Use the information in the following table to complete the fields for this dialog, then click **Save & Close**

Field	Description
Name	Name of the Outbound Route
Business Unit	The Business Unit that owns the Outbound Route
Timeout	Answer timeout in seconds
Mode	Specifies how the outbound address is selected. The options are: <ul style="list-style-type: none"> • Specific Address—The value entered in the Specific Address field determines the outbound address. • Translated Address Lookup—The Service Address (refer to chapter 6.5, Creating and Assigning a Service Address) used for the Routing Plan determines the outbound address. If an address is specified in the Translation Address field on the Service Address dialog, the Translation Address is used; otherwise the current Service Address is used.

7.5.10.2 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Once you have saved the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

The Table below describes the Outbound Route events that can occur. If configured, a “Follow On Routing Step” is executed when the Event occurs

Event	Description
Call Release	The defined Follow On Routing Step is used when the call is released.
Outbound Destination Barred	The defined Follow On Routing Step is used when the called party has been disallowed.
Outbound Destination Busy	The defined Follow On Routing Step is used when the called party is busy.
Outbound Destination Network Error	The defined Follow On Routing Step is used when the call failed due to a network error
Outbound Destination Not Answering (Ringing)	The defined Follow On Routing Step is used when an answer timeout occurs.

7.5.11 Queue

Queue Routing Steps are used to send the call to a Queue and handle all the Queue-related Events.

The Figure and Table below shows and describes the Queue Routing Step dialog fields:

The screenshot shows the configuration interface for a Routing Step named 'FC-RLA-Q-Sales'. The interface is divided into sections: General, Queue, and Events.

- General:**
 - Name: FC-RLA-Q-Sales
 - Business Unit: FC-CO
 - Type: Queue
 - Default Next: Q-Sales-De
 - Default Next Step: FC-RLA-Q
- Queue:**
 - Route To Queue: Sales
 - Queue Business Unit: FC-CO
 - Maximum Queue Time: (empty field)
 - Valid Queue DTMF Digits: (empty field)
- Events:**

<input type="checkbox"/> Name	Follow On Routing Step
<input type="checkbox"/> Call Release	Event-Call Release
<input type="checkbox"/> Call Routing	
<input type="checkbox"/> Queue DTMF Digit Received	Event-Queue DTMF Digit Received
<input type="checkbox"/> Queue Entry Criteria Failed	Event-Queue Entry Criteria Failed
<input type="checkbox"/> Queue has Closed (Last Agent Logged Out)	Event-Queue has Closed (Last Agent...
<input type="checkbox"/> Queue is Closed (No Agents)	Event-Queue is Closed (No Agents)
<input type="checkbox"/> Queue Maximum Time Reached	

At the bottom of the Events section, it shows '1 - 7 of 7 (0 selected)' and 'Page 1'.

Field	Description
Default Next Step	Routing Step to continue with if an Event occurs (for example, Queue Entry Criteria Failed) and no other Event is being handled. Note that if the Queue request succeeds, the Routing Plan stops executing. The plan will be executed again if a Queue-related event occurs.
Route To Queue	The Queue in which to place the call
Maximum Queue Time	Optional override of the maximum time (in seconds) a Call can remain in this Queue before the Event <i>Queue Maximum Time Reached</i> is triggered. The Classification value is used when it is left empty.

Field	Description
Valid Queue DTMF Digits	Optional override list of the valid DTMF digits that can trigger the Event <i>DTMF Digits Received</i> (e.g. 123#). The Classification value is used when it is left empty.

7.5.11.1 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Once you have saved the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

Edit each event as described in 7.3.5. [Editing an Event for a Routing Step](#)

After an Event occurs, the Routing Plan continues with the Follow On Routing Step, if one has been defined for the Event. Otherwise the Routing Plan Continues with the Default Next Step as defined by the table in chapter 7.5.11, [Queue Step](#).

The Table below describes the Queue routing step events that can occur. If configured, a “Follow On Routing Step” is executed when the Event occur:

Field	Description
Call Release	The call was released by an Agent or by the OASIS system after the call had queued and the <i>Requeue on Call Release</i> feature was enabled.
Call Routing	This Event is invoked when the Client that has handled the Call is requesting that the Call be onward Routed via the Routing Plan. Please note that there are several Call Routing Reasons that can be invoked by an Agent and the Reason is available in a Routing Plan System Variable called <i>LastCallRoutingReason</i> . The following values are currently available: <i>QueueHold</i> : The Agent has requested that the Call be onward routed to Queue Hold using the provided Delay. <i>IVRApplication</i> : The Agent has requested that the Call be onward routed to an IVR Application using the provided Application Information.
Queue DTMF Digit Received	The caller entered a DTMF digit while the call was queuing.

Field	Description
Queue Entry Criteria Failed	The call was not accepted in the queue because it failed the Queue entry criteria (the Queue was full)
Queue has Closed (Last Agent Logged Out)	The call was queued successfully, but while it was queueing, the Queue was closed because the last Agent servicing the queue logged out.
Queue is Closed (No Agents)	The call could not be Queued because no Agent was logged onto this Queue and the Queue is Closed.
Queue Maximum Time Reached	The call was queued successfully, but reached the maximum amount of time a call was allowed in the Queue.

7.5.12 Queue Hold

A Queue Hold Routing Step is used to Hold a call in the System for a specified amount of time. It is typically used for Queue Hold (see Chapter 6.15.1, [Queue Hold](#)) or Scheduled Calls Routing Scenarios (See Chapter 6.15.2, [Scheduled Calls](#)).

Routing Step Routing Steps

Manual-Queue-Hold-1

Routing Plan: **Manual Queue Hold** | Saved Version: **5** | Updated: **No**

General

Name * Business Unit *

Type

Default Next

Default Next Step +

Queue Hold

Holding Queue * Holding Time (secs)

Outbound Address Agent Notes

Events

<input type="checkbox"/>	Name	Follow On Routing Step
<input type="checkbox"/>	Invalid Holding Parameters	Release

1 - 1 of 1 (0 selected) Page 1

Field	Description
Holding Queue	<p>This field is set automatically to “System Scheduled” by the System when the Routing Step is created. There is a “System Scheduled” Queue available in all Business Units.</p>
Holding Time	<p>The amount of time (in seconds) that the Call should be held in the Holding Queue. Once this time has expired, the Routing Plan executes the Default Next Step.</p> <p>This field can be populated with a variable. The variable would typically be the outcome of a Menu where the User selected a delay. A value of 0 (No Delay) is valid in a Queue Hold scenario to signify an immediate presentation to the Agent as soon as it is available.</p> <p>The field is optional as the value should only be provided on the step for Queue Hold scenarios. The value on the form is only used when no value is provided by the System</p> <p><u>Queue Hold Scenarios</u> The Delay must be provided on the form as no value is provided by the System. A value of 0 is valid (immediate Call-Back). If the field is left blank the Routing Step exits via the Event <i>Invalid Holding Parameters</i>.</p> <p><u>Queue Hold/Agent Rescheduled Call Scenarios</u> The Delay is automatically provided by the Agent. If a value is given on the form in such a scenario, the Routing Step ignores it.</p> <p><u>Scheduled Outbound Call Scenarios</u> The Delay is automatically provided by the System (from the System Call Scheduler record – See Chapter 8, System Call Scheduler). If a value is given on the form in such a scenario, the Routing Step ignores it</p>

Field	Description
Outbound Address	<p>Specifies the Outbound Address to use if it is not provided by the System. This field can be populated with a variable. The variable would typically be the outcome of a Collect Digit (see Chapter 7.5.5, Collect Digits) or a copy of the CLI System Variable.</p> <p>The field is optional as the value should only be provided on the step for Queue Hold scenarios. The value on the form is only used when no value is provided by the System.</p> <p><u>Queue Hold Scenarios</u> The value is required. If the field is left blank or the content of the variable specified is empty, the Routing Step exits via the Event <i>Invalid Holding Parameters</i>.</p> <p><u>Scheduled Call Scenarios</u> The Outbound Address is provided by the System (from the System Call Scheduler record). If a value is given on the form in such a scenario, the Routing Step ignores it.</p> <p> The Queue Hold Routing Step does not carry out any Outbound Dialling. This field is simply a way to record the Outbound Address that will be presented to the Agent.</p>
Agent Notes	<p>This optional free text field may specify any additional notes that will be shown to the Agent verbatim once they are presented with the call e.g. This may be used to supply DDI information.</p> <p>This field can be populated with a variable.</p> <p> The string specified in the field is appended to the standard Call Notes (CCB 49) with “ / “ separator. i.e. existing notes are preserved.</p> <p> If the same Call executes the Queue Hold Routing Step several times, the Agent Notes are not added everytime if they are still present in the Notes.</p>

7.5.12.1 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Edit each event as described in chapter 7.3.5, [Editing an Event for a Routing Step](#).

The table below describes the events that can occur with this Routing Step. If configured, a “Follow On Routing Step” is executed when the Event occurs.

Event	Description
Invalid Holding Parameters	<p>The Routing Step exits via this Event if the parameters specified on the form are not valid or not sufficient to carry out the Queue Holding and the subsequent operations.</p> <p>Please note that this Event is not triggered if the Holding Time is negative. This case is valid and treated as if the delay was set to 0 for an overdue/immediate Call Back.</p> <p>This event is triggered if the requested Holding Time (irrespective of its origin i.e. the form or the system) is greater than the maximum overall delay configured for the platform.</p>

7.5.13 Release

The Release Routing Step is the simplest routing step for releasing a call. It has only one parameter.



When new steps are created either explicitly or implicitly (for example, as a Default Next Step), the type of the step created is always Release. This is the basic type which can be changed to any other type.

The Figure and Table below shows and describes the Release Routing Step dialog fields:

The screenshot shows a web-based configuration interface for a 'Routing Step'. The main title is 'Routing Step FC-RL3-Release'. Below the title, there are three fields: 'Routing Plan' with a value of 'FC-RL2', 'Saved Version' with a value of '2', and 'Updated' with a value of 'No'. A 'General' section is expanded, showing 'Name *' as 'FC-RL3-Release', 'Business Unit *' as 'FC', 'Type' as 'Release', and 'Release Cause Code' as 'Normal'. There are also search and refresh icons for the Business Unit field.

Field	Description
Release Cause Code	The telephony Cause Code sent back to the network as part of the Release. The available options are: <ul style="list-style-type: none"> • Normal, • Busy, • Call Rejected, • No Route to Destination.

7.5.14 Route List

Route List Routing Steps are used to distribute calls to either a Queue or an Outbound Route using load balancing or linear searches.

The Figure and Table below shows and describes the Route List Routing Step dialog fields:

Routing Step

Routing Steps
▼ ▲

Manual-Test-Routing50pc-FirstStep

Routing Plan: Manual-Test-Routing50pc
Saved Version: 4
Updated: No

General

Name * Business Unit *

Type

Default Next

Route to Route List

Route Selection Option *

<input type="checkbox"/> Name ▲	Type	Percentage...	Max. Overflow (%)	Max. Underflow (%)	Queue
<input type="checkbox"/> Others	Queue	50			11.1.PRD.3-RC
<input type="checkbox"/> Sales	Queue	50			11.1.PRD.3-RC

1 - 2 of 2 (0 selected) Page 1

Events

<input type="checkbox"/> Name ▲	Follow On Routing Step
<input type="checkbox"/> Call Release	
<input type="checkbox"/> Call Routing	
<input type="checkbox"/> General Route List Error	
<input type="checkbox"/> Outbound Destination Barred	
<input type="checkbox"/> Outbound Destination Busy	
<input type="checkbox"/> Outbound Destination Network Error	
<input type="checkbox"/> Outbound Destination Not Answering (Ringing)	
<input type="checkbox"/> Queue DTMF Digit Received	
<input type="checkbox"/> Queue Entry Criteria Failed	
<input type="checkbox"/> Queue has Closed (Last Agent Logged Out)	
<input type="checkbox"/> Queue is Closed (No Agents)	
<input type="checkbox"/> Queue Maximum Time Reached	

1 - 12 of 12 (0 selected) Page 1

Field	Description
Route Selection Option	<p data-bbox="746 353 1310 427">Enables you to select one of the following strategies:</p> <ul data-bbox="746 448 1310 840" style="list-style-type: none"><li data-bbox="746 448 1310 593">• Percentage Based Load Balancing—Distribute the calls between the various routes according to the percentage specified.<li data-bbox="746 611 1310 685">• Percentage Based Load Balancing with Limited Overflow<li data-bbox="746 703 1310 840">• Linear Search—Allocate the call to the first successful route by carrying out a linear search starting from the first route. <p data-bbox="746 860 1310 927">With either strategy, when one entry in the Route List fails, the logic picks another entry.</p>

7.5.14.1 Adding a New Route Entry

To add a route entry, proceed as follows

- 1 Click inside the route list entry table beneath the Route Selection Option field to display the Add New Route Entry icon in the ribbon.

- 2 Click the **Add New Route Entry** icon in the ribbon.

The New Route Entry dialog is displayed

The screenshot shows the 'Route Entry' dialog box. At the top, it says 'Route Entry' and 'Queue1'. Below that, it shows 'Routing Plan' as 'MMRStress1b' and 'Routing Step' as 'Distribute my Calls - 2'. The 'General' section is expanded, showing the following fields:

- Name *: Queue1
- Business Unit: MPS
- Type: Queue
- Percentage *: 50
- Queue *: MMRStress1Q

- 3 In the Name field, enter a meaningful name for the queue.
- 4 In the Percentage field, enter a number between 0 and 100 to designate the percentage of calls to route to the queue.
- 5 In the Max Overflow (%) field, enter a number between 0 and 100
- 6 Max Underflow (%) field, enter a number between 0 and 100.



Note: The percentage fields are only displayed only if the *Percentage Based Load Balancing* or *Percentage Based Load Balancing with Limited Overflow* option is selected..

- 7 Click **Save & Close** in the ribbon.

You are returned to the Routing Step dialog.

- 8 Repeat steps 1 through 7 for each queue that you want to add.



When you finish entering route entries for a *Percentage Based Load Balancing* or *Percentage Based Load Balancing with Limited Overflow* option, the Percentage totals must equal 100 before you can save the Routing Step.

- 9 Click **Save & Close** in the ribbon for the Routing Step dialog

7.5.14.2 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Once you have saved the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

Edit each event as described in 7.3.5. [Editing an Event for a Routing Step](#)

The Table below describes the Events for the Route List Routing Step. If configured, a “Follow On Routing Step” is executed when the Event occurs.

Field	Description
Call Release	The call was released by an Agent or by the OASIS system after the call had queued and the Requeue on Call Release feature was enabled.
Call Routing	<p>This Event is invoked when the Client that has handled the Call is requesting that the Call be onward Routed via the Routing Plan.</p> <p>Please note that there are several Call Routing Reasons that can be invoked by an Agent and the Reason is available in a Routing Plan System Variable called <i>LastCallRoutingReason</i>. The following values are currently available:</p> <p><i>QueueHold</i>: The Agent has requested that the Call be onward routed to Queue Hold using the provided Delay.</p> <p><i>IVRApplication</i>: The Agent has requested that the Call be onward routed to an IVR Application using the provided Application Information.</p>
General Route List Error	The call encountered an error.
Outbound Destination Barred	Applies to Outbound Routes only. An Event is triggered when the Outbound Route (number) is disallowed
Outbound Destination Busy	Applies to Outbound Routes only. An Event is triggered when the Outbound Route (number) is busy.

Field	Description
Outbound Destination Network Error	Applies to Outbound Routes only. An Event is triggered when the Outbound Route failed due to a Network Error.
Outbound Destination Not Answering (Ringing)	Applies to Outbound Routes only. An Event is triggered when the Outbound Route did not encounter an error, but did not receive a response.
Queue DTMF Digit Received	The caller entered a DTMF digit while the call was queuing
Queue Entry Criteria Failed	The call was not accepted in the queue because it failed the Queue entry criteria
Queue has Closed (Last Agent Logged Out)	The call was queued successfully, but while it was queueing, the Queue was closed because the last Agent servicing the queue logged out
Queue is Closed (No Agents)	The call could not be Queued because no Agent was logged onto this Queue and the Queue is Closed
Queue Maximum Time Reached	The call was queued successfully but reached the maximum amount of time a call was allowed in the Queue

7.5.15 Routing Plan

A Routing Plan Routing Step routes the call to another Routing Plan (The operation is similar to a “GO TO” Operation). For other ways to call

another Routing Plan, please see Chapter 6.4, [Creating a Subroutine Routing Plan](#).

The Figure and Table below shows and describes the the Routing Plan Routing Step dialog fields:

Field	Description
Switch Routing Plan	Specifies the Routing Plan to which the call will be routed.
Process Classification during Switch Routing Plan	Specifies whether to use the Classification on the destination Routing Plan

7.5.15.1 Events

No Events apply for the Routing Plan Routing Step.

7.5.16 Set Values

A Set Values Routing Step sets the specified values for one or more specified variables. This type of Routing Step is often used in a Routing Plan with a Compare Routing Step.

The figure below show the Set Values Routing Step dialog fields:

The screenshot shows the 'Set Values' dialog for a routing step. The title bar indicates 'Routing Step' and 'compare values-DefaultRoutingStep'. Below the title bar, there are fields for 'Routing Plan' (aaa mmm), 'Saved Version' (1), and 'Updated' (No). The 'General' tab is active, showing the following fields:

- Name:** values-DefaultRoutingStep
- Business Unit:** PABU2CTOP1
- Type:** Set Value
- Default Next Step:** (empty)

Below the 'General' tab is the 'Set Values' section, which contains a table with the following columns: #, Variable Name, Type, Expression, Classification, and Queue. The table is currently empty, and a message 'To load Variable records, click here.' is displayed below it. The status bar at the bottom indicates '0 - 0 of 0 (0 selected)' and 'Page 1'.

7.5.16.1 Configuring Variable entries

The Variable entries will be processed in the order they appear on the form. If desired, you can move existing entries up or down using the arrows on the ribbon.

To create a new Variable or set an existing Variable, proceed as follows

- 1 Click **Save** in the ribbon for the Set Values Routing Step to enable the Set Values table in the dialog.
- 2 Click inside the Set Values table to display the Add New Variable icon in the ribbon.

3 Click the **Add New Variable** icon.

The Variable dialog is displayed:

The screenshot shows the 'Variable New' dialog box. At the top, there is a 'Variables' dropdown menu, navigation arrows (up, down, left, right), and a 'Set Value' button. Below this, the dialog is titled 'Variable New' and shows 'Routing Plan' with a date '2016-02-10-1' and 'Routing Step'. The 'General' tab is active. It contains the following fields:

- Variable Name***: An empty text input field.
- Business Unit***: A dropdown menu with 'FC-CO' selected.
- Type**: A dropdown menu with 'Expression' selected.
- Expression***: A large, empty text area for entering the variable's value.

4 In the Variable Name field, enter only alphanumeric characters or the underscore character (_). The entry must begin either with a letter or with an underscore character.

For example, *_TestVar1* and *this_is_ok* are valid variable names however *1Test* is not (as it starts with a number).

5 In the Type field, do one of the following:

- Select Expression. The value is based on the contents of the Expression field. The following are valid types of expressions:

Field	Description
Literal String	Specify a Literal String by enclosing the string with double quotes ("). To include double quotes (") within the string itself, use the backslash (\) character as the escape character. To include the backslash (\) character within the string itself, enter two backslash characters (\\).

Field	Description
Integer value	Specify a numeric value (with no enclosing quotes, as this would lead to it being stored as a Literal String)
Variable Name	Specify the name of an existing Variable in the field. This causes the value of the specified Variable to be stored in the new variable
Functions	Enter one or more nested functions, which are applied to their specified parameters. The result of the function is stored in the specified Variable. For details about functions, refer to chapter 7.5.16.2, Set Value Functions

- Select Call Barring Information. The following Call Barring fields are displayed:

Field	Description
Call Barring Property	Determines which Barred Address property is checked. The supported Barred Address properties are listed in the following table.
Lookup Address	A CLI or a variable containing a CLI which is checked against the Routing Plan's Call Barring list to determine if the specified Call Barring Property is allowed.

The following Call Barring Properties are available:

Barred Address Property Name	Description
Allow Call Completion	Sets the variable to a 1 if Call Completion is allowed for the Call. The information is retrieved from the internal Call Details for the Call.
Allow Number Announcement	Sets the variable to a 1 if Number Announcement is allowed for the Call. The information is retrieved from the internal Call Details for the Call.
Allow Listing SMS	Sets the variable to a 1 if the sending of a Listing SMS is allowed for the Call. The information is retrieved from the internal Call Details for the Call.

- Select Queue or Classification. The value stored is the fully qualified name of the Queue or Classification.
- Select Classification Property. The value stored is the value of the Classification Property selected. The following Properties are available:

Field	Description
Outbound Type (0, 1, 2)	<p>This property is not visible on the Classification form and is only set internally by MCG and CSA-MMR. It is used by the CRM Event Handler and the Clients (SST) to determine the type of Outbound Call they are being presented with.</p> <p>AMS1 Name: <i>CDS CallbackOutboundType</i></p> <p>It is an integer property that can take the following values.</p> <ul style="list-style-type: none"> • 0: None (<i>Default</i>) • 1: Queue Hold • 2: Outbound Schedule <p>The property is set to <i>0=None</i> by default when a Classification is created. Its value is then changed by MCG and CSA-MMR using the following rules:</p> <ul style="list-style-type: none"> • When it creates an Outbound Scheduled Call, MCG sets the Property to <i>2=Outbound Schedule</i> with the Persistent Flag • Whenever a Queue Hold Routing Step is executed by CSA-MMR, if the current property value is <i>0=None</i>, it is set to <i>1=Queue Hold</i> with the Persistent Flag. If the current Property value is not 0, it is left unchanged.

- Select System Variable. The value stored is the content of the System Variable (See chapter 7.5.6.1, [System Variables](#) for a list of System Variables).

6 Click **Save & Close** in the ribbon.

7.5.16.2 Set Value Functions

When setting a function in the Expression field the format must be:

FunctionName(Param1,Param2)

Where *Param1* and *Param2* can be nested functions as shown in the figure below:

#	Variable Name	Expression
5	Test4	Add(Test4,Add(10,1))

In the above figure, the Expression `Add(Test4, Add(10,1))` causes the software to add $10 + 1$, and then to add the result (11) to the value of Test4. The result is then stored as the value for the Test4 variable.

Supported functions for the Expression field are as follows::

- **Add**
This Function will return the sum of the Parameters if all the parameters are Integer Values. Otherwise it will concatenate the parameters together.
- **Sub**
This Function will only work if all the parameters are Integer Values, and will return the result of subtracting Param2 from Param1.
- **Min**
This Function will only work if all the parameters are Integer Values, and will return the value of Param1 or Param2 depending on which one is smaller.
- **Max**
This Function will only work if all the parameters are Integer Values, and will return the value of Param1 or Param2 depending on which one is larger.
- **Left**
This Function will return the Left most characters of Param1, with Param2 characters.

For example, the Function `Left("This is a tring",10)` returns the value `This is a s`.

- **Right**

This Function will return the Right most characters of Param1, with Param2 characters.

- **Length**

This Function will return the length of the string Param1.

- **Find**

Finds the first position of a character in a string. Returns a position that can then be used with `Left` or `Right` functions.

For example, the following returns the part of the ANI before the @ sign.

```
Left(strANI ,Find("@",strANI))
```

- **ReplaceQueue**

This Function replaces all occurrences of Queue Param1 in subsequent Routing Steps with Queue Param2.

7.5.17 Subroutine Call

A Subroutine Call Routing Step routes invokes the execution of a Subroutine Routine Plan (See Chapter 6.4, [Creating a Subroutine Routing Plan](#)). Once the Subroutine Routing Plan has been executed,

control returns to the Calling Routing Step and continues via the Default Next Step.

The figure below show the Subroutine Call Routing Step dialog fields:

The screenshot shows a dialog box for configuring a 'Subroutine Call' routing step. The title bar reads 'Routing Step 11.2.PRD.1-Manual - Calling Subroutine'. Below the title, there is a table with columns 'Routing Plan', 'Saved Version', and 'Updated'. The 'Routing Plan' is '11.2.PRD.1-Manual - Call...', 'Saved Version' is '4', and 'Updated' is 'No'. The 'General' section contains the following fields:

- Name ***: 11.2.PRD.1-Manual - Calling Subroutine
- Business Unit ***: FC-CO
- Type**: Subroutine Call
- Default Next Step +**: 11.2.PRD.1-Manual - Calling Su
- Subroutine ***: SR-Test1-

Field	Description
Default Next Step	The Routing Step to execute once the Subroutine Routing Plan has returned.
Subroutine	The Subroutine Routing Plan to Call.

Subroutine Routing Plan may also themselves call other Subroutine Routing Plans.

7.5.18 Subroutine Return

A Subroutine Return Routing Step is invoked inside a Subroutine Routing Plan (See Chapter 6.4, [Creating a Subroutine Routing Plan](#)) to return to the Calling Plan.

The figure below show the Subroutine Return Routing Step dialog fields:

The screenshot shows a dialog box for creating a 'Subroutine Return' routing step. The title is 'Routing Step SR-Return-Final'. Below the title, it displays 'Routing Plan: SR-Test1-', 'Saved Version: 3', and 'Updated: No'. The 'General' section includes a 'Name' field with 'SR-Return-Final', a 'Business Unit' dropdown with 'FC-CO', and a 'Type' dropdown with 'Subroutine Return'. At the bottom, there is a 'Return From Subroutine' section with a 'Return Value' text input field.

Field	Description
Return Value	Not Supported / Reserved for future use.

7.5.19 Time of Day

A Time of Day Routing Step allows the branching of a routing plan based on the time of day and special days of the year.

The Figure and Table below shows and describes the the Time of Day Routing Step dialog fields:

The screenshot shows the 'Routing Step' dialog for 'colinRtPlan-FirstStep-DefaultRoutingStep'. The 'Name' field is 'colinRtPlan-FirstStep-DefaultRoutingStep' and the 'Business Unit' is 'PABU2CTOP1'. The 'Type' is 'Time of Day'. The 'Default Next Step' is 'colinRtPlan-FirstStep-DefaultRoutingStep-DefaultRouti'. The 'Time Zone' is '(GMT) Greenwich Mean Time: Dublin, Edinburgh, Lisbon, London'. The 'Daily Entries' table is as follows:

<input type="checkbox"/>	Name	Follow on Routing Step	Start Time Hours	Start Time Minutes	End Time Hours	End Time Minutes
<input type="checkbox"/>	Weekday Hours	Weekday Hours-DefaultRouti	08	00	18	00
<input type="checkbox"/>	Weekend Hours	Weekend Hours-DefaultRouti	10	00	16	00

Dialog item	Description
Default Next	Routing Step to continue with by default, i.e. if no Daily Entry or Special Period Entry qualifies
Time Zone	Time zone used to enter the Daily entries

7.5.19.1 Configuring Daily Entries

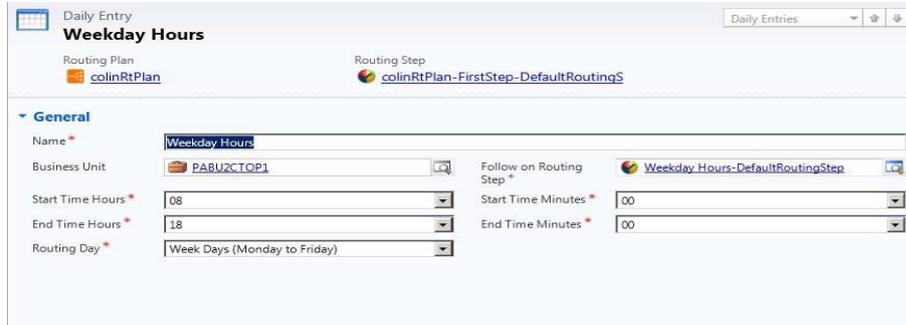
Daily Entries divide the week into parts. When the time falls within a “part,” the Routing Plan continues with the corresponding Follow On Routing Step

To enter Daily Entries, proceed as follows

- 1 Click **Save** in the ribbon for the Time of Day Routing Step to display the Daily Entries table in the dialog.
- 2 Click inside the Daily Entries table to display the Add New Daily Entry icon in the ribbon.

3 Click the Add New Daily Entry icon.

The Daily Entry dialog is displayed:



4 Edit the fields in the Daily Entry dialog as described in the table below:

Field	Description
Name	Name of the Daily Entry (e.g. "Monday Daytime")
Business Unit	The Business Unit that owns the entry
Follow On Routing Step	The Routing Step to execute when the time falls within this Daily Entry
Start Time Hours / Start Time Minutes	The Start Time for this entry
End Time Hours / End Time Minutes	The End Time for this entry  The End Time Minute constitutes the complete minute. For example, a value of 23:59 extends until midnight. Therefore, Monday 00:00 to 23:59 is the entire Monday, starting at midnight and ending at midnight.
Routing Day	Selection from the individual days of the week, as well as the following special entries:: <ul style="list-style-type: none"> • Weekdays (Monday to Friday)—Can be used to define a Daily Entry that takes effect from Monday through to Friday. • Weekends (Saturday and Sunday)—Can be used to define a Daily Entry that takes effect on Saturday and Sunday. • Every Day—Can be used to define a Daily Entry that takes effect every day

5 Click Save & Close in the ribbon.

7.5.19.2 Configuring Calendar Routes

Calendar Routes override Daily Entries. The Calendars associated with the Calendar Routes are can be used by multiple Routing Plans, and are published separately.

Calendars Routes are evaluated in the sequence shown in the table. The order of the Calendar Routes can be changed by selecting an entry, and clicking the Move Up/Down buttons in the ribbon.

To add a new Calendar Route, proceed as follows.

- 1 Click **Save** in the ribbon for the Time of Day Routing Step to display the Daily Entries table in the dialog.
- 2 Click inside the Calendar table to display the Add New Calendar Route icon in the ribbon.
- 3 Click the **Add New Calendar Route** icon.

The Calendar Route dialog is displayed

- 4 Edit the fields in the Calendar Route dialog as described in the table below:

Field	Description
Calendar	The Calendar to associate with this Route.
Business Unit	The Business Unit that owns the entry
Follow On Routing Step	The Routing Step to execute when the time falls within this Calendar

- 5 Click **Save & Close** in the ribbon

7.5.19.3 Creating a new Calendar

While creating a Calendar Route as above, if a new Calendar is required:

- 1 Click the icon to the right of the Calendar field.
The Look Up Record dialog is displayed
- 2 Click **New** in the Look Up Record dialog
The Calendar dialog is displayed.

- 3 Edit the fields in the Calendar dialog as described in the table below:

Field	Description
Name	The name of the Calendar
Business Unit	The Business Unit that owns the Calendar
Time Zone Option	Selection whether to use the Timezone specified in the Routing Step, or to use a Calendar specific Timezone.
Time Zone	The Time Zone to use for this Calendar, if the Time Zone Option is set to Specified Time Zone.

- 4 Click **Save** in the ribbon to create the Calendar.
- 5 Click in the Calendar Periods table to display the Add New Calendar Period Icon in the ribbon.
- 6 Click the **Add New Calendar Period** icon. The Calendar Period dialog is displayed

- 7 Edit the fields in the Calendar Period dialog as described in the table below:

Field	Description
Name	Name of the Calendar Period
Business Unit	The Business Unit that owns the entry
Start Time Hours / Start Time Minutes	The Start Time for this entry
End Time Hours / End Time Minutes	The End Time for this entry  The End Time Minute constitutes the complete minute. For example, a value of 23:59 extends until midnight. Therefore, Monday 00:00 to 23:59 is the entire Monday, starting at midnight and ending at midnight
Every Year	Indicates whether this Calendar Period should repeat every year. If not selected the Special Period Entry will be used only once.

- 8 Click **Save & Close** in the ribbon

7.5.19.4 Configuring Special Period Entries

Special Period Entries override Daily Entries and Calendar Routes. For example, these can be used for Public Holidays.

To enter Special Period Entries, proceed as follows

- 1 Click **Save** in the ribbon for the Time of Day Routing Step to display the Daily Entries table in the dialog.
- 2 Click inside the Special Period Entries table to display the Add New Special Period Entry icon in the ribbon.

3 Click the **Add New Special Period Entry** icon.

The Special Period Entry dialog is displayed

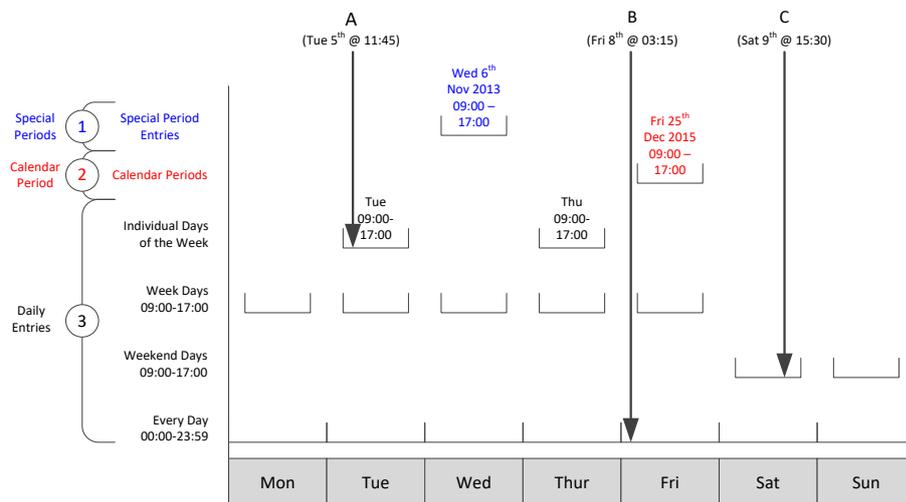
4 Edit the fields in the Special Period Entry dialog as described in the table below:

Field	Description
Name	Name of the Special Period Entry
Business Unit	The Business Unit that owns the entry
Follow On Routing Step	The Routing Step to execute when the time falls within this entry
Start Time Hours / Start Time Minutes	The Start Time for this entry
End Time Hours / End Time Minutes	The End Time for this entry  The End Time Minute constitutes the complete minute. For example, a value of 23:59 extends until midnight. Therefore, Monday 00:00 to 23:59 is the entire Monday, starting at midnight and ending at midnight
Every Year	Indicates whether this Special Period Entry should repeat every year. If not selected the Special Period Entry will be used only once.

5 Click **Save & Close** in the ribbon

7.5.19.5 Overlap Behaviour

If any of the time periods specified by different Time of Day Routing Step entries overlap, the system resolves the potential conflict by treating the overlapping steps as a hierarchy, shown in the figure below.



Based on the time of the call, the various TOD entries are checked in the order of priority shown in the left margin of the figure. TOD entries at the top of the left margin have higher priority than those at the bottom. The logic applies the first one that matches the date/time of the call.

In the figure above, the entries configured for Special Days and Individual Days of the Week overlap with the time slots Week Days and Every Day. The calls A, B and C are received at different times:

- Call A does not qualify for Special Days and Calendar treatment, but is "caught" by the Individual Days of the Week entry for Tuesday 09:00-17:00.
- Call B arrives too early to qualify for Week Days 09:00-17:00, so it falls all the way through to the final "catch-all" time slot of Every Day 00:00-23:59.
- Call C is "caught" in the Weekend Days 09:00-17:00 time slot.

7.5.20 Voice Mail

A Voice Mail Routing Step plays a Voice Mail greeting and records a Voice Mail, then sends it as an attachment via e-mail to the address configured in the Voice Mail Profile.

The Figure and Table below shows and describes the the Voice Mail Routing Step dialog fields:

The screenshot shows the configuration for a 'Test Voice Mail' Routing Step. The 'General' section includes fields for Name (Test Voice Mail), Type (Voice Mail), Business Unit (Getting Started), and Voice Mail Profile (Test Voice Mail). The 'Events' section contains a table with one entry: 'Recording Timeout'.

Field	Description
Voice Mail Profile	The Voice Mail Profile to use

Field	Description
Voice Mail Profile	The Voice Mail Profile to use

7.5.20.1 Adding a New Voice Mail Profile

To add a new Voice Mail profile, proceed as follows:

- 1 With the Voice Mail Routing Step dialog displayed, click the icon to the right of the Voice Mail Profile field.
The Look Up Record dialog is displayed.

2 In the Look Up Record dialog, click **New**.

The New Voice Mail Profile dialog is displayed, similar to the following:

3 Use the information in the following table to edit the fields in the dialog.

Field	Description
Name	The name of the Voice Mail Profile When specifying a name, do not enter the apostrophe character (')
Business Unit	The Business Unit that owns the Voice Mail Profile
Announcement	Announcement to use for the Voice Mail greeting
Maximum Recording Time In Seconds	Maximum length of the Voice Mail to be recorded
To Email Address	E-mail address that the Voice Mail notification will be sent to
From Email Address	E-mail address that the Voice Mail notification will be sent from

Field	Description
Subject Line Email	<p>The subject line for the email</p> <p>This field can also contain the following tags (inclusive of the angle brackets), which are expanded in the email to be sent:</p> <ul style="list-style-type: none"> • <CLI>—Calling Line Identifier of the caller • <CALL_TYPE_NAME>—Classification of the call • <QUEUE_NAME>—Last Queue used for the call. This is useful if a call is routed to Voice Mail after being timed out of queue
Body Text Email	<p>The body text of the email</p> <p>This field can also contain the following tags (inclusive of the angle brackets), which are expanded in the email to be sent:</p> <ul style="list-style-type: none"> • <CLI>—Calling Line Identifier of the caller • <CALL_TYPE_NAME>—Classification of the call • <QUEUE_NAME>—Last Queue used for the call. This information is useful if a call is routed to Voice Mail after being timed out of queue

4 Click Save & Close

7.5.20.2 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Once you have saved the Routing Step, click the Refresh icon () in the upper right corner of the Events table to display the events.

The Table below describes the voice mail routing event that can occur. If configured, a “Follow On Routing Step” is executed when the Event occurs:

Event	Description
Maximum Recording Time Exceeded	The voice mail recording exceeded the maximum allotted time.

7.5.21 Wait

The Wait Routing Step is used to delay further processing of the current Routing Plan for a fixed period of time or, optionally, until a Telecare Information event is received.

Routing Step

Wait RS

Routing Plan DeleteMe

Routing Steps v ↑ ↓

Saved Version

3

Updated

No

General

Name * Business Unit *

Type

Default Next

Default Next Step +

Wait

Duration *

Telecare Information

Events

<input type="checkbox"/> Name ▲	Follow On Routing Step
<input type="checkbox"/> Telecare Information Received	
<input type="checkbox"/> Timeout	

1 - 2 of 2 (0 selected) Page 1

Field	Description
Default Next Step	Routing Step executed if an event occurs that is not explicitly handled.
Duration	The time to wait in seconds, unless interrupted by a Telecare Information event and the Telecare Information checkbox is ticked on this routing step.
Telecare Information	When checked, the wait period can be interrupted by Telecare Information events.

7.5.21.1 Events

The Events area is populated with relevant Events only after you have saved the Routing Step. Edit each event as described in chapter 7.4, Editing an Event for a Routing Step.

The table below describes the events that can occur with this Routing Step. If configured, a “Follow On Routing Step” is executed when the Event occurs.

Event	Description
Telecare Information Received	The Routing Step exits via this Event when a Telecare Information event is received and the Telecare Information checkbox on this routing step is ticked.
Timeout	The Routing Step exits via this Event when the configured timeout period expires.

8 System Call Scheduler

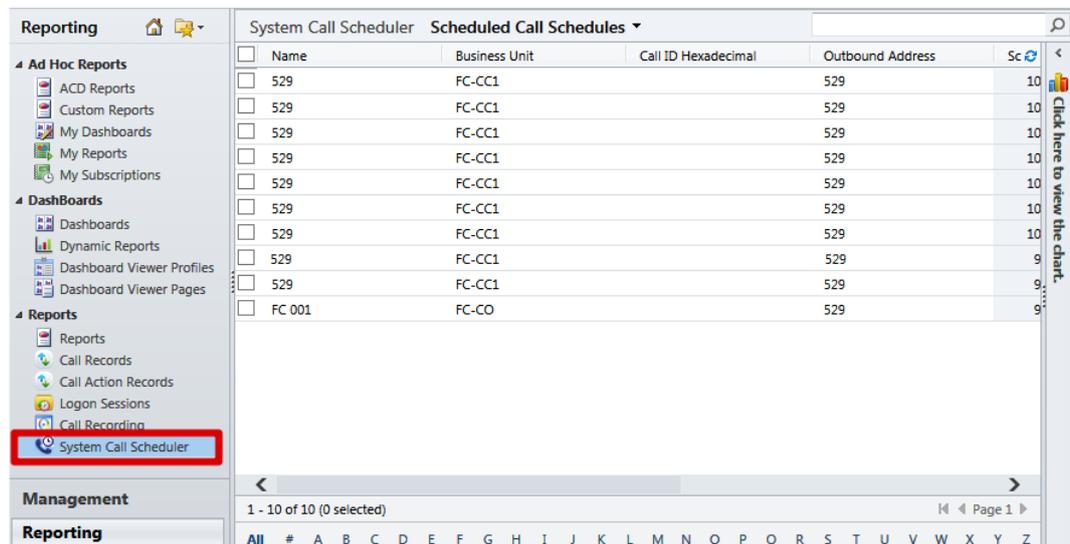
8.1 Overview

This chapter includes the following chapters:

- Introduction to System Call Scheduler
- Creating a Scheduled Call

8.2 Introduction to System Call Scheduler

The System Call Scheduler is an Management Portal Entity that allows the scheduling of Outbound Calls to be delivered at a defined date and time. The System Call Scheduler is available in the Reporting area as illustrated below.



Name	Business Unit	Call ID Hexadecimal	Outbound Address	Sc
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	10
<input type="checkbox"/> 529	FC-CC1		529	9
<input type="checkbox"/> 529	FC-CC1		529	9
<input type="checkbox"/> FC 001	FC-CO		529	9

1 - 10 of 10 (0 selected) Page 1

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

A System Call Schedule has the following fields:

The screenshot shows the 'System Call Scheduler' interface for the user 'agentthk@cca.ypi.com'. The 'General' tab is active, displaying the following fields and values:

- Name ***: agentthk@cca.ypi.com
- Originator Type**: Agent
- Business Unit ***: YpiContactCentreA-In
- State**: Closed
- Outbound Address ***: 320
- Classification**: YPI-C Scheduled Call CO THK
- Scheduled Date and Time ***: 26/04/2016 14:13
- Service Address**: (empty)
- Call ID Hexadecimal**: 571F69681000012D
- Call Notes**: test

Metadata at the bottom of the form:

- Owner**: YpiContactCentreA-In.Administration
- Created On**: 26/04/2016 14:13
- Created By**: MachineCrmProxyUser MachineCrmProxyUser
- Modified On**: 26/04/2016 14:13
- Modified By**: MachineCrmProxyUser MachineCrmProxyUser
- Status**: Active
- Status Reason**: Active

Field	Description
Name	The name of the System Call Schedule. This value is generated by the system.
Business Unit	Business Unit of the System Call Scheduler Record. When the records are created form a Client Station, this is the BU of the Agent.
Outbound Address	The Outbound Address for the Agent to Outdial.
Scheduled Date Time	Due date and time for the Scheduled Call.
Call ID Hexadecimal	The Hexadecimal ID of the Call once it has been created.

Field	Description
Originator Type	The type of originator for the call schedule: Agent: The call schedule was created by an agent. Portal: The call schedule was created via the Management Portal. API: The call schedule was created via the CSIF API.
State	The State of the record: Scheduled: The call schedule is created. Queued: The call has been created and queued for delivery. Cancelled: The schedule has been Cancelled before it was created as a call. Routing Failed: The Call was created for delivery but could not be routed successfully. Closed: The call has completed and been released.
Classification	Classification selected by the Agent. The Scheduled Call is created with this Classification.
Service Address	Optional Service Address for routing the Call to MMR. If present, this Service Address overrides the one in the Classification
Call Notes	Notes associated with the Scheduled Call when it was created.

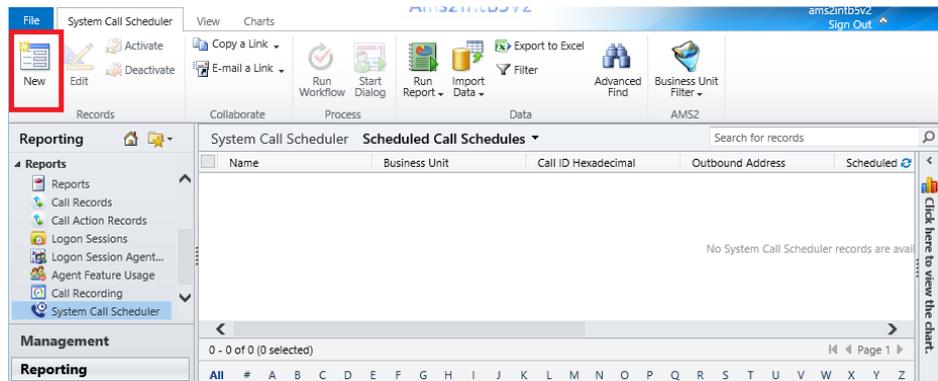
8.3 Creating a Scheduled Call

There are several ways to create System Call Scheduler Records, either as single records or via bulk uploads.

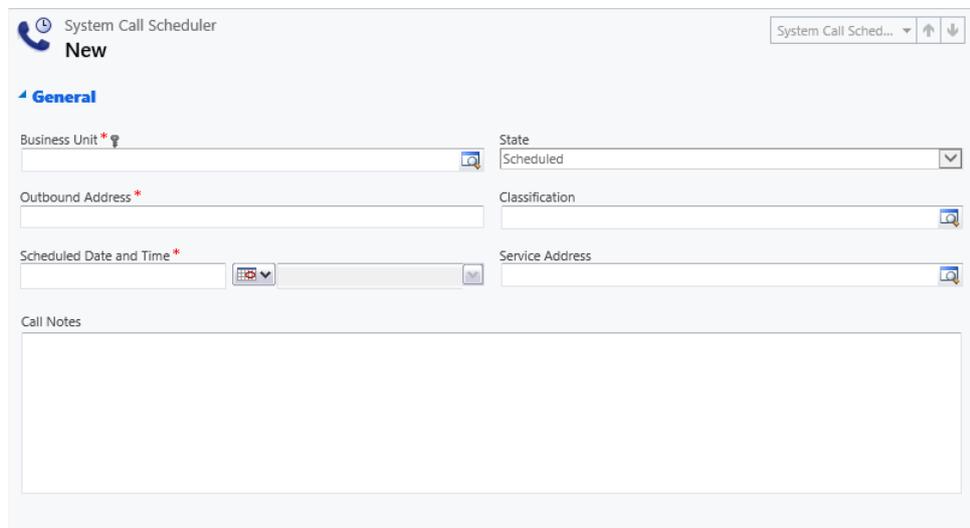
8.3.1 Single Record Creation

8.3.1.1 Creation via the CRM Interface

Single System Call Scheduler Records can be created via the Management Portal Management interface by logging on as a user that has either the **Parent Tenant Administrator** or **Tenant Administrator** Management Role, then navigating to **Reporting -> Reports -> System Call Scheduler** and clicking on **New**.

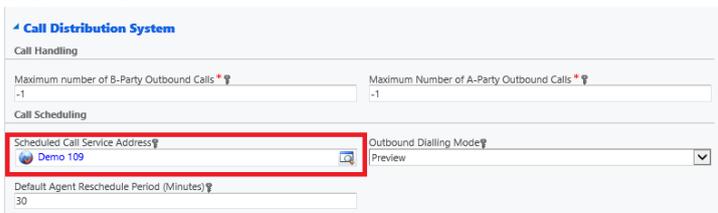


The following dialog will be displayed.



Filling in the fields as described in the table below.

Field	Description
Business Unit (Required)	The name of your Business Unit. This would be normally be the Business Unit for the Classification.
Outbound Address (Required)	The Outbound Address to be dialed. This must be a valid telephony number.
Scheduled Date Time (Required)	The date and time when the Scheduled Call is required.
State (Not Required)	The State of the record. You cannot change this field. The system will fill in a value for this field once the Scheduled Call has been created, setting it to Scheduled.
Classification (Required)	The Classification for the Scheduled Call.

Field	Description
Service Address (Optional)	<p>The Service Address for routing the Call.</p> <p>If present, this Service Address overrides the one in the Classification setting <i>Scheduled Call Service Address</i>. It is recommended the Classification setting is used, instead of populating this Service Address field.</p> 
Call Notes (Optional)	<p>The notes to be associated with the Scheduled Call when it is created. These notes are shown the agent when the call arrives at their position (See also the relevant Client Software documentation for further details).</p> 

8.3.1.2 Creation from the Agent Client

System Call Scheduler record can be created by Agents using their Client application via the CSIF interface. Please refer to the Client Software documentation for details.

8.3.2 Bulk Uploads

System Call Scheduler records can be bulked uploaded either directly in Management Portal, using the import function, or via the CSIF interface available for third party application integration.

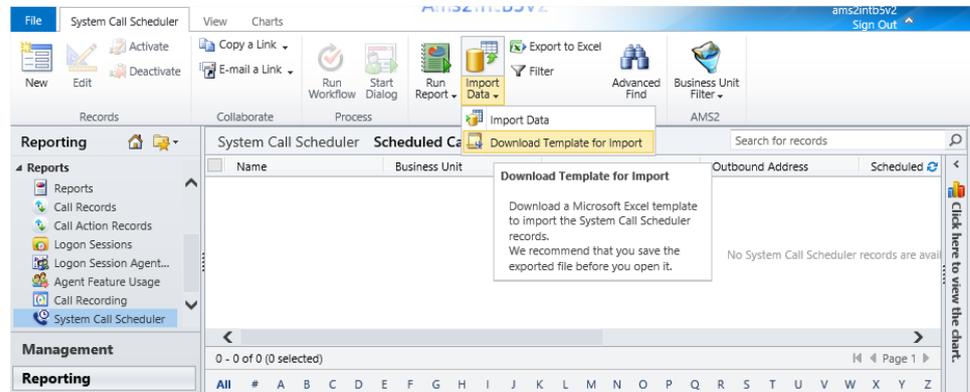
Details on the CSIF API are available from Volt Delta.

Before using bulk loading, it is recommended single call schedules are created as per chapter 8.3.1, Single Record Creation to validate the processing.

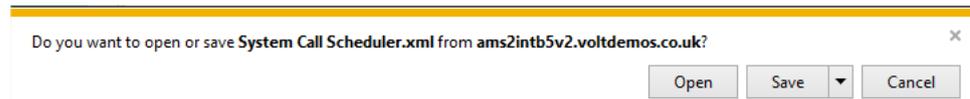
Bulk loading directly in the Management Portal is performed as follows:

- 1 Open an Internet Explorer web browser and enter the address for the Management Portal. Logon as a user that has either the **Parent Tenant Administrator** or **Tenant Administrator** Management Role.

- 2 Navigate to **Reporting -> Reports -> System Call Scheduler**. Click on the drop down on the **Import Data** button, and select **Download Template for Import**.



- 3 When prompted, save the template file to appropriate location.

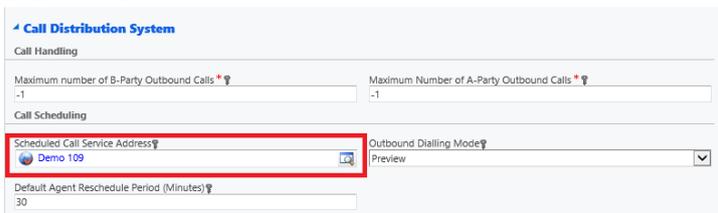


- 4 Using Microsoft Excel open the template file you saved. You should have a spreadsheet with the following column headings:

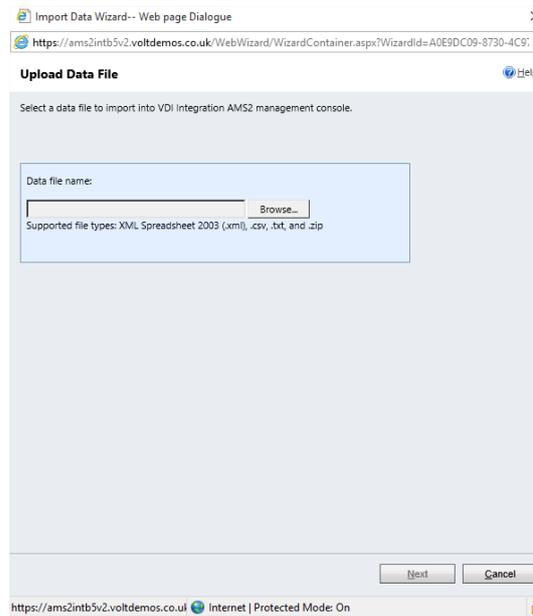
Name	Business Unit	Outbound Address	Scheduled Date and Time	Call ID Hexadecimal	Call Notes	Owner	Originator Type	State	Classification	Service Address
------	---------------	------------------	-------------------------	---------------------	------------	-------	-----------------	-------	----------------	-----------------

- 5 Fill in the columns as described below, creating a row for each Scheduled Call you wish to generate. Note some fields are not required, as the system will fill those in when the records are imported.

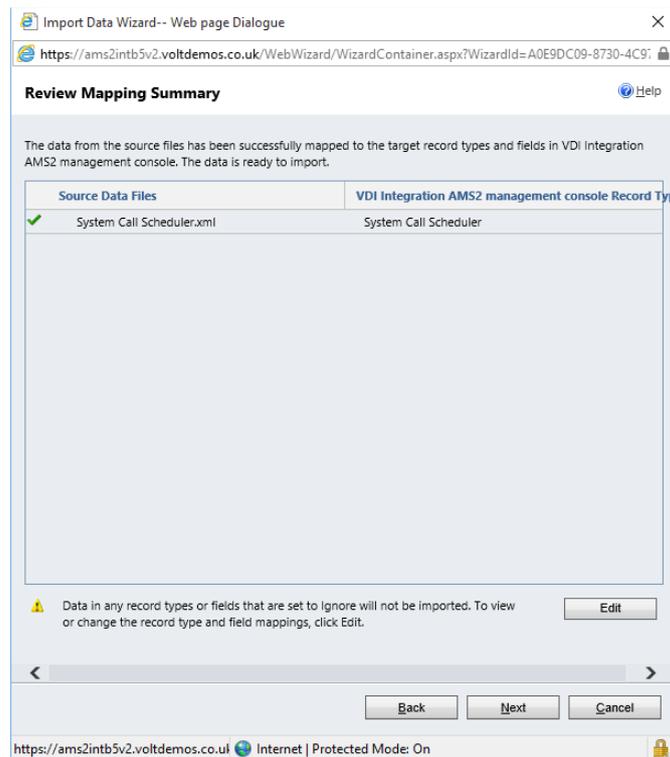
Field	Description
Name (Not Required)	The name of the Scheduled Call. The system will fill in a value for this field once the Scheduled Call has been imported.
Business Unit (Required)	The name of your Business Unit. This would be normally be the Business Unit for the Classification.
Call ID Hexadecimal (Not Required)	The Hexadecimal ID of the Call. The system will fill in a value for this field once the Scheduled Call has been imported.
Outbound Address (Required)	The Outbound Address to be dialled. This must be a valid telephony number.

Field	Description
State (Not Required)	The State of the record. The system will fill in a value for this field once the Scheduled Call has been imported, setting it to Scheduled.
Classification (Required)	The Classification for the Scheduled Call.
Scheduled Date Time (Required)	The date and time when the Scheduled Call is required.
Service Address (Optional)	The Service Address for routing the Call. If present, this Service Address overrides the one in the Classification setting <i>Scheduled Call Service Address</i> . It is recommended the Classification setting is used, instead of populating this Service Address field. 
Call Notes (Optional)	The notes to be associated with the Scheduled Call when it is created. These notes are shown the agent when the call arrives at their position (See also the relevant Client Software documentation for further details). 

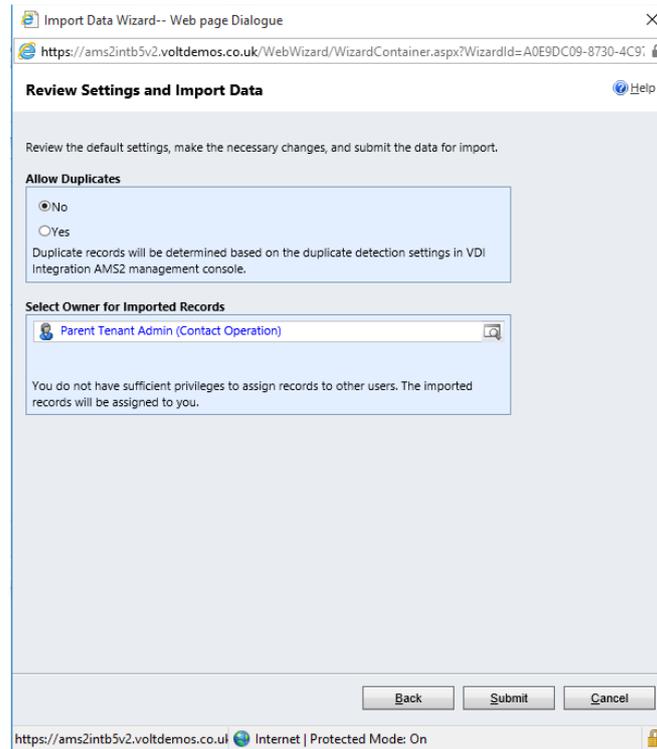
- 6 Once you have finished entering all your data in the template file (spreadsheet), import the data by navigating to **Reporting -> Reports -> System Call Scheduler**. Click on the **Import Data** button. The following dialog will be displayed.



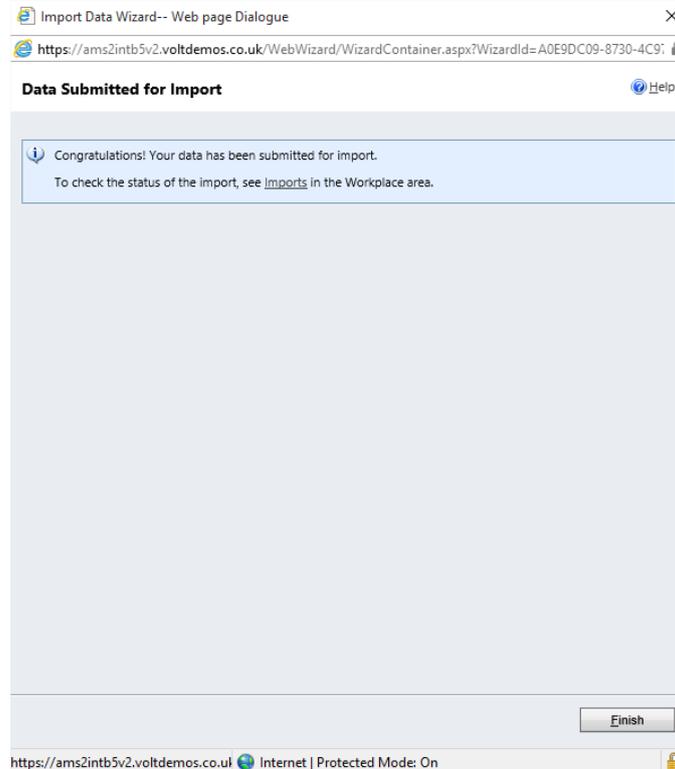
- 7 Click the **Browse** button to find and select your template file, then click **Next**. The following dialog should be displayed.



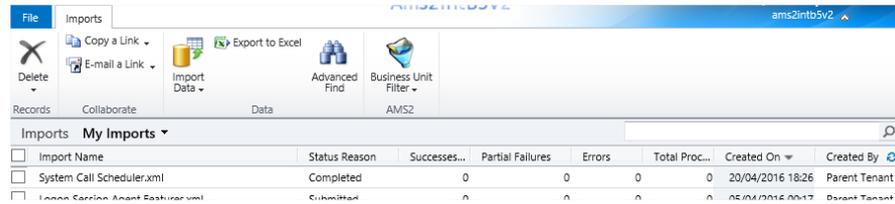
- 8 Click **Next** on the above dialog to display the following.



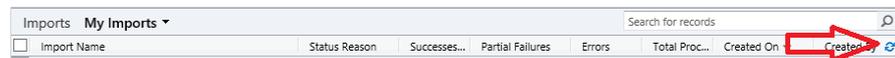
9 Now click on **Submit**. The following dialog will be displayed.



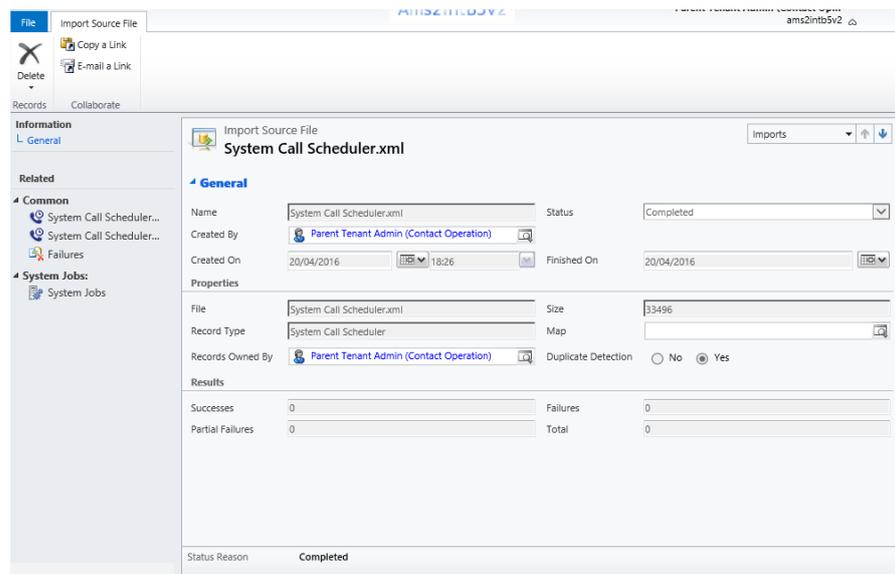
- Before clicking on the **Finish** button, click on the **Imports** link shown in the text. This will display a window where you can monitor and review the status of your import. For example the following shows a row for an import.



You can press the refresh button on the right hand side in the list of column headings to refresh the list and monitor to see when the import **Status Reason** changes to **Completed**, at which point the data will have been imported.



Once the import has completed you can review the import (e.g. to investigate any failures) by double clicking on the row, which will display a window similar to the following.



9 Web Chat

9.1 Overview

This chapter includes the following chapters:

- Introduction
- Configuration of Chat Channels

9.2 Introduction

The OASIS Web Chat application enables users on the internet to request a text chat session with a contact centre agent.

Internet users access the OASIS Web Chat application using a supported internet browser to request a chat session. OASIS Web Chat collects the user details and generates a connection-less "data call". Once the data call is presented to a contact centre agent along with the chat details, the call handling application (e.g. SmartStation or Media Bar) loads a web page from the OASIS Web Chat application and displays it to the agent in a tab so that he can "chat" with the internet user.

9.3 Configuration of Chat Channels

The Web Chat Channel configuration usually is implemented at Tenant Business Unit level. You need to log-on to the Management Portal as user with corresponding permissions for configuring Chat Channels.

Complete the following tasks:

- 6 Switch to the Chat Channel configuration by clicking **Chat Channels** in the Multi Media Routing section:



- 7 Create a new Chat Channel by clicking **New** in the Management Portal ribbon.

- 8 Enter a Name for the Chat Channel and select a Business Unit (usually at Contact Operation or Contact Center level).

- 9 Save the newly created Chat Channel. The form refreshes and displays the automatically generated Chat Client URL (here partially greyed out due to security precautions). Chat end-users have to navigate to this URL for starting a chat. The URL can be used directly or embedded in a 3rd party web page.

- 10 Enter properties as needed. Please find an explanation of the properties in the following table:

Property	Description
Section General	
Channel Enabled	Enables/disables the channel.
Inactivity timeout (Secs)	If the chat session remains inactive (i.e. without any end-user input) for more than this timer the session will be closed. Typical value: 300 seconds (five minutes).
Called Party Address	Must equal the Address Lookup value configured in the Service Address of the Routing Plan that is being used to route web chat calls to an agent queue.
Section Look and Feel	
Page Title	A text that is displayed as title in the end user's chat page. Refer to element 5 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Greeting Pre Text	The greeting message an end user gets when having started a chat session consists of Greeting Pre Text + end user name + Greeting Post Text. Refer to elements 7 + 8 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Greeting Post Text	See Greeting Pre Text.

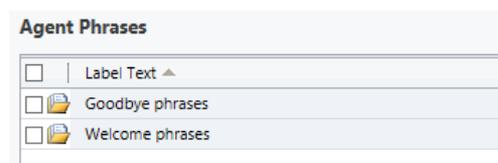
Property	Description
Email subject	The end user can request an email transcript of the chat. This property defines the content of the email's subject line.
Email From Address	The email's sender address.
Logo URL	A URL link to an image that is displayed as logo on top of the end user chat page. Refer to element 1 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Logo Height (px)	The height reserved for the logo image in pixels.
Background color	Background color of end user chat page in hex notation of RGB color space. Refer to element 4 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Own text color	The color of the text entered by the end-user.
Other text color	The color of the text entered by other chat parties (usually the agent).
Border color main	Border color of start page. Refer to element 3 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Border color	Border color of chat page. Refer to element 6 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Section Message Texts	This section contains default texts for the end-user interface. The can be changed if another localization of the end-user interface is desired.
Provide Details	The header text displayed on the chat start page (i.e. the page with the 'Start' button). Refer to element 2 in chapter 9.4, End-user Interface Look-and-Feel Elements.
Other properties	All other properties of this section are self-explanatory.

Property	Description
Section Access Control – Captcha Properties	OASIS Web Chat allows internet users to be challenged with Captchas if traffic from a single IP address exceeds configured limits. This is intended to prevent the system from being flooded with automatically generated rogue traffic. The Captchas are provided by the Google Recaptcha service http://www.google.com/recaptcha . In order to use this service API keys must be obtained from the address above and configured in the following entries. The keys must only be configured if Captcha support is enabled.
Enabled	Turns on Captcha protection to challenge clients if the numbers of chat session requests from a single IP address exceed configured limits. The client's IP address is determined from the HTTP header X-Forwarded-For. If this header is not available, then the client IP address as reported by IIS is used instead.
Max Requests	The maximum number of chat requests from a single IP allowed during the time interval in minutes specified by Max Request Interval Minutes before the client is challenged with a Captcha.
Max Request Interval Minutes	The time interval in minutes during which the maximum number of chat requests is determined.
Max Request Timeout Minutes	The duration in minutes over which the client continues to be challenged with Captchas once the traffic limits have fallen back below the threshold value (Max Requests).
ReCaptcha Private Key	Private key for Google ReCaptcha service.
ReCaptcha Public Key	Public key for Google ReCaptcha service.

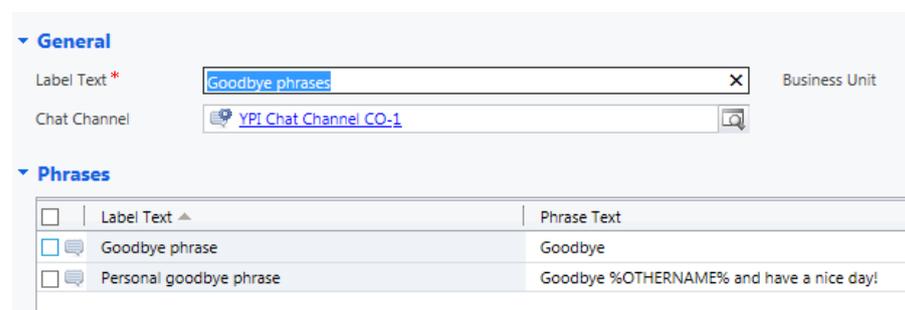
Property	Description
Section Access Control – Trusted User Data Transfer Properties	Trusted User Data Transfer allows for starting the end-user chat client directly with passing the end-user's name, email, and chat subject in the initial HTTPS call; thereby bypassing the chat start page. In order to enable this transfer of a private key needs to be configured in the chat server (via the Management Portal) as well as in the tenant's web portal calling the chat client. Refer to chapter 9.5, Trusted User Data Transfer for details.
Enabled	Enables Trusted User Data Transfer.
Data Transfer Key	Private key being used for Trusted User Data Transfer.
Section Access Control – Contact Tracker CRM Access Properties	Web Chat transcripts can be stored as Contact Activities in the OASIS Contact Tracker CRM or as Contact Tasks in the Salesforce CRM. The Contact Tracker CRM in a OASIS system usually is being run in the same CRM instance as the Management Portal CRM. If no Contact Tracking of Web Chat transcripts is required all 'CRM' properties can be left empty.
CRM Connector Type	The type of CRM access – only Dynamics or Salesforce are supported.
CRM URL	Contact Tracker CRM organization URL or the Salesforce login URL. The Salesforce login URL looks like : https://login.salesforce.com/services/Soap/u/34.0 where 34.0 is the supported soap version (see also Salesforce documentation). If the CRM is being run on the Management Portal server refer to Doc. Ref. 5 section Contact Tracker Web Chat.
CRM User	User name for external CRM access. Leave empty if Dynamics CRM is being run in the same CRM instance as the Management Portal CRM.
CRM Domain	User domain for external CRM access. Leave empty if Dynamics CRM is being run in the same CRM instance as the Management Portal CRM. (not relevant for Salesforce access)

Property	Description
CRM Security Token	Special token for Salesforce login (not relevant for Dynamics). If you doesn't know your security token, then: Login to your salesforce organisation and navigate from the top navigation bar to <i>your name</i> / My Settings/Personal/Reset My Security Token. Clicking on the button invalidates your existing token and the new token will be mailed to you.
CRM Password/Confirm Password	Password for external CRM access. Leave empty if Dynamics CRM is being run in the same CRM instance as Management Portal CRM.
Section Agent	
Origin URL	The URL displayed to the agent as clickable link showing the originating web page of the chat, e.g. http://www.voltdelta.net .
Agent Phrases	The Smart Station provides a configurable, tree-like list of phrases from which the agent may select in order to save typing effort during a chat session. The agent phrases are organized in a two-level system: Phrase categories and phrases within a category. See screenshots below.

Agent phrase categories:



Agent phrases within a category:



Placeholders in agent phrases:

Placeholder	Expands to
%OTHERNAME%	The name of the end-user.

- 11 When having finished the property configuration **Save** the Web Chat Channel and **Publish** it. The Management Portal then creates and maintains the configuration files for channels in XML format. The channel configuration files are named chatChannelConfig_<GUID>.xml, where <GUID> denotes the unique channel ID.

9.4 End-user Interface Look-and-Feel Elements

The following screenshots show the start page (upper) and chat page (lower) of the end-user interface. The user interface elements are tagged

and referenced from the respective property/key descriptions in chapter 9.3, Configuration of Chat Channels.

VoltDelta CONNECTING PEOPLE & INFORMATION

Please provide some details:

Name *)
end-user

Email
end.user@enduser.net

Subject
Chat example

*) mandatory input

Start chat

VoltDelta CONNECTING PEOPLE & INFORMATION

VDR CO chat

Active users: Agent T

(15:06:08): Connecting to chat server...

(15:06:08): Connected to chat server

(15:06:08): Welcome end-user to the web chat session

Agent T (15:06:12): -> Joined the chat

9.5 Trusted User Data Transfer

Trusted User Data Transfer allows transferring the end-user's name, email address, and chat subject directly in the HTTPS request when starting the chat client. Therefore, the web chat start-up page is bypassed. In order to enable a secure data transfer chat clients as well as the chat server need a common private key. The private key is used for generating a hashcode that guarantees the integrity of the transferred data.

This mechanism is useful for situations where the chat client is embedded in a tenant's web platform. End-users already logged on to the tenant's web platform can start the chat client without being challenged again for their name and email address.

The tenant's web portal needs to fulfill two requirements in order to enable the Trusted User data Transfer:

- The web portal must generate the hashcode according to the following rules:

ASCII encoding of text before hash computation;

SHA1 hash computation.

Programming example C# .NET:

```
// Input values private key, name, email, subject as strings
string key = KeyTextBox.Text;
string name = NameTextBox.Text;
string email = EmailTextBox.Text;
string subject = SubjectTextBox.Text;

// Call hashcode generation method
string hashcode = GetSHA1Hash(key + name + email + subject);
...

// Hashcode generation method
public static string GetSHA1Hash(string text)
{
    var SHA1 = new SHA1CryptoServiceProvider();

    byte[] arrayData;
    byte[] arrayResult;
    string result = null;

    // Convert text string into ASCII encoded byte array
    arrayData = Encoding.ASCII.GetBytes(text);

    // Generate hashcode
    arrayResult = SHA1.ComputeHash(arrayData);

    // Convert byte array back to hexadecimal string
    result = BitConverter.ToString(arrayResult);

    return result;
}
```

- The HTTPS request for calling the chat client must contain the user data as well as the hashcode as follows:

```
https://<chat-server>/?channel=<chat-channel>&name=<end-user-name>&email=<end-use-email>&subject=<subject-text>&hashcode=<generated-hashcode>
```

The first part of the URL including <chat-server> and <chat-channel> is the Chat Client URL being retrieved in step 9 of chapter 9.3, Configuration of Chat Channels.

The chat server must have enabled Trusted User Data Transfer and configured the common private key (refer to chapter 9.3, Configuration of Chat Channels).

10 Prompt Management

10.1 Overview

This chapter includes the following chapters:

- Introduction to Prompt Management
- Configuration Sequence
- Creating a Media Prompt
- Creating an Announcement Media Prompt
- Creating an Announcement
- Publishing an Announcement
- Working With Service Announcement Profiles

10.2 Introduction to Prompt Management

The process of building prompts is accomplished in steps, beginning with uploading .wav audio recordings to the Management Portal to create *Media Prompts*. You then add basic identification attributes to the media prompts by constructing an *Announcement Media Prompt*, which can reference one or more Media Prompts. One or more Announcement Media Prompts are then combined to produce an *Announcement*, which is the format that is played to the caller. Announcements can be played to the caller at various phases of a call and for various conditions. Once the Announcements have been created, they can be used to build advanced entities called *Service Announcement Profiles*, which define (for a queue or classification) the announcements that are played and with what frequency they are played during on-hold and in-queue call states

In the Management Portal, the entities described in the Table below are used to configure announcement prompts and playback. The Table also lists the order of sequence for creating each entity.

Step	Prompt Entity	Description
1	Media Prompt	<p>The uploaded audio file(s) (in .wav format) and descriptive text.</p> <p>There are several types of Media Prompt:</p> <p>Normal:</p> <p>The Normal Media Prompt type holds a single audio prompt file.</p> <p>Play Queue Time:</p> <p>A <i>System</i> Media prompt used to announce the Queue time for the Queue in which the call is currently located. It is a container holding the 68 audio prompt files (digits) required by the feature.</p> <p>Alphanumeric Strings</p> <p>A <i>System</i> Media prompt used to hold all the audio prompt files required by the Alphanumeric String spelling feature (up to over 450 files).</p>
2	Announcement Media Prompt	<p>Contains one or more Media Prompts, plus the following attributes:</p> <ul style="list-style-type: none"> • Language—The language spoken in the prompts • Gender—Whether the voice talent is male or female • Persona—Identifies a specific voice talent or character <p>The Media Prompts are played in the sequence specified by the Announcement Media Prompt.</p> <p>Once a Media Prompt has been assigned to an Announcement Media Prompt, it is no longer available to assign to other Announcement Media Prompts</p>

Step	Prompt Entity	Description
3	Announcement	<p>Contains one or more Announcement Media Prompts. Where more than one Announcement Media Prompt exists, one Announcement Media Prompt is chosen and played during a call based on the best match to Language, Gender, and Persona.</p> <p>Unlike Media Prompts, Announcements are reusable and can be selected multiple times from various places where audio is played.</p> <p>Announcements can be played from Routing Plans or can be referenced and played by Service Announcement Profiles and Voice Mail Profiles.</p>
4	Service Announcement Profile	<p>Defines the music and Announcements played to callers during the following call states:</p> <ul style="list-style-type: none"> • In-Queue • On-Hold A-Party • On-Hold B-Party

10.3 Configuration Sequence

Creating Announcements or Service Announcement Profiles and enabling them for use with the Management Portal involves the following sequence:

1. Create announcements, as described in the following chapters:
 - a. Creating a Media Prompt
 - b. Creating an Announcement Media Prompt
 - c. Creating an Announcement
 - d. Publishing an Announcement
2. Create a Service Announcement Profile to use the announcements, as described in the following chapters:
 - a. Creating a Service Announcement Profile
 - b. Publishing a Service Announcement Profile
 - c. Assigning Service Announcement Profiles to Classifications or Queues

10.4 Creating a Media Prompt

10.4.1 Overview

There are several types of Media prompts as per the following table. *Normal* Media Prompts are simple wrappers around a single audio file. The other types, also known as *System* Media Prompts, are a collection of Audio Files. At runtime, when the *System* Media Prompt is triggered via the Announcement, a specific algorithm is used to decide which of the files in the collection are played and in what order.

Type	Description
Normal	A normal Media Prompt is a single audio file that is part of an announcement. See chapter 10.4.3, Standard Media Prompts.
Play Queue Time	A System Media prompt used to announce the Queue time for the Queue in which the call is currently located. See chapter 10.4.4, Play Queue Time Media Prompts
Alphanumeric String	A System Media prompt used to spell out any alphanumeric string provided at runtime. See chapter 10.4.5, Alphanumeric String Media Prompts

Supported Formats

The following .wav file formats are supported for media prompts. The recommended format is shown in **bold**

Format Name	Frequency	Bitrate
OKI ADPCM	6 kHz	4 bits
OKI ADPCM	8 kHz	4 bits
G.711 A-Law	6 kHz	8 bits
G.711 A-Law	8 kHz	8 bits
G.711 μ -Law	6 kHz	8 bits
G.711 μ-Law	8 kHz	8 bits (Recommended Format)

Format Name	Frequency	Bitrate
Linear PCM	8 kHz	8 bits
Linear PCM	8 kHz	16 bits
Linear PCM	11kHz	8 bits
Linear PCM	16 kHz	16 bits

10.4.2 Remarks

To achieve the best audio results, G.711 μ -Law is the recommended audio file format. When creating audio prompts from a standard 44.1K file as provided by the studio, the following procedure is recommended to archive optimal results:

1. Start from a 44.1K file (Mono or Stereo)
2. Apply any required normalization/audio *comparer* if required
3. Convert (down-sample) to 8kHz/16bits Mono using a high quality down-sampler
4. Save the 8kHz/16bit file as G.711 μ -Law
5. The resulting file is 8kHz/8Bits as per the μ -Law format definition



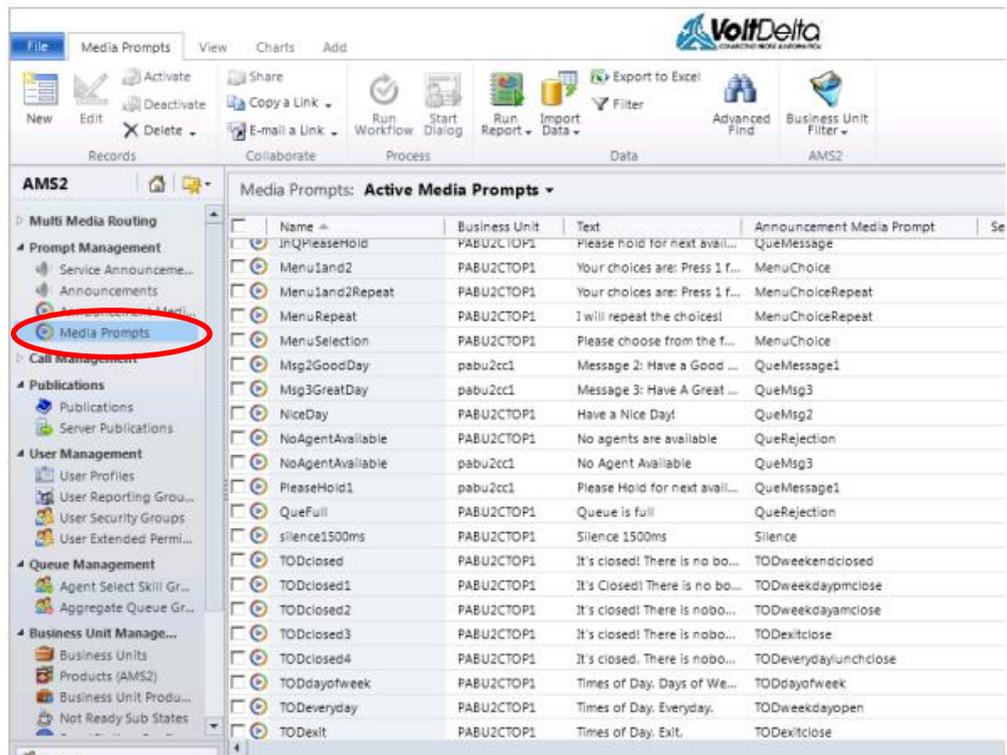
Note: Music files (for Music on Hold) may require additional processing (frequency filtering, etc.) to ensure an acceptable rendering in G.711 μ -Law depending on their audio profile.

10.4.3 Standard Media Prompts

To create a Standard Media Prompt, proceed as follows:

- 1 In the Management Portal navigation pane, select **Prompt Management** → **Media Prompts**.

Active Media Prompts display in the right pane, as shown in the following figure:



- 2 Click **New** in the ribbon.

The Media Prompt dialog is displayed:

3 Complete the following fields:

Field	Description
Name	The name of the media prompt
Text	This is optional for a voice announcement, although it can be used to indicate the text of the prompt if required. For text-based announcements (e.g. for web chat) this is the text of the announcement.
Business Unit	The Business Unit to which this Media Prompt belongs.
Type	The Media Prompt type, which is either “Normal”, “Play Queue Time” or “Alphanumeric String”. For Normal Media Prompts, set this to Normal before proceeding. For the other types, see the following chapters.



A message appears in order to indicate that the record has not been created yet.

4 Click **Save**.

The Prompt Management section appears in the dialog. For **Normal Media Prompt** it looks like this:



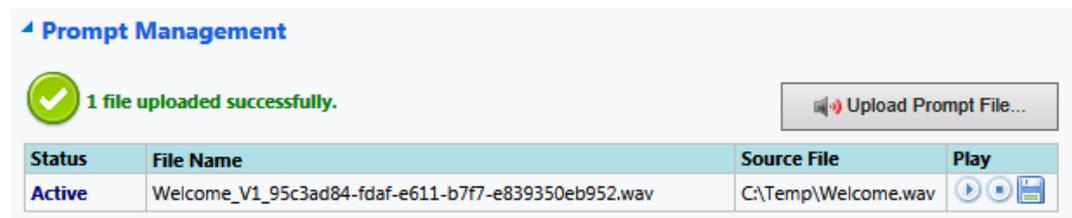
5 Click **Upload Prompt File...** to choose a media prompt .wav file to upload.

The internal file name for each Media Prompt is assigned automatically and appears in the File Name (On Server) field.



See chapter 10.4.2, [Remarks](#) for details on the recommended format for the .wav files to be used as media prompts

6 A message is displayed to indicate that the record (with the uploaded prompt attached) was successfully uploaded and saved.



7 Click **Save & Close** to exit the Media Prompt.



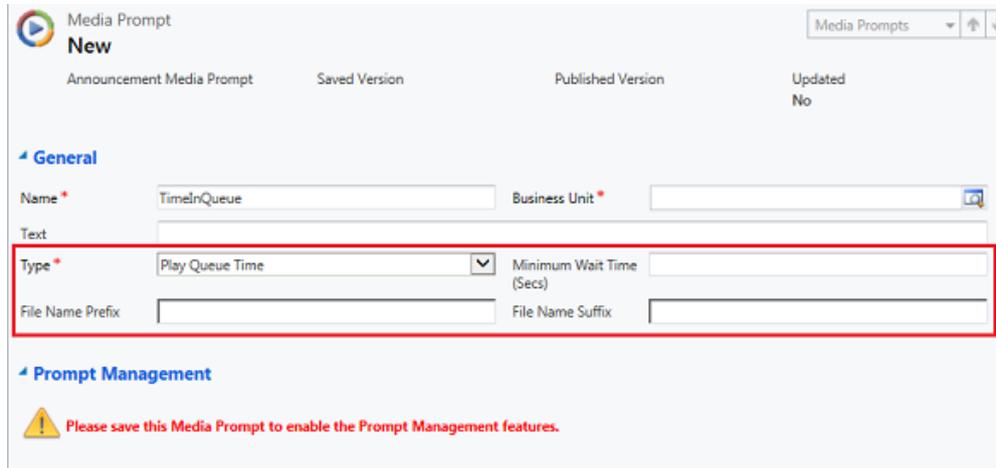
A Media Prompt is not published on its own but is published when an Announcement that uses it is published. For publishing instructions, refer to chapter 10.7, [Publishing an Announcement](#)

8 Continue on to Chapter 10.7, [Creating an Announcement Media Prompt](#)

10.4.4 Play Queue Time Media Prompts

Please see chapter 10.4.3, Standard Media Prompts for the first steps of the Media Prompt creation until the point where the Type is selected. If the Type-field is changed to **Play Queue Time**, the dialog displays

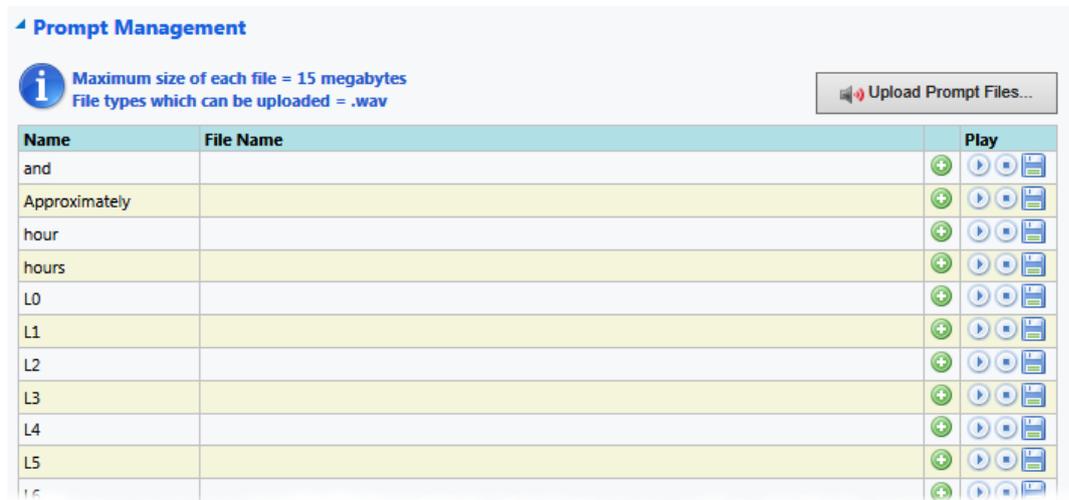
three additional fields, which are optional: File Name Prefix, File Name Suffix and Minimum Wait Time:



NOTE: Once saved, the fields *Name*, *Type*, *File Name Prefix* and *File Name Suffix* cannot be changed.

1 Click Save.

The Prompt Management section appears in the dialog. For **Play Queue Time** Media Prompts it looks like this:



Name	File Name	Play
and		+
Approximately		+
hour		+
hours		+
L0		+
L1		+
L2		+
L3		+
L4		+
L5		+
L6		+

Click **Upload Prompt Files...** (or the green +-icon, ) to select one or more media prompt .wav files to upload.

The **Play Queue Times** feature requires 68 prompt audio files, the names of which must each match the corresponding prompt name followed by the “.wav” suffix. All 68 prompts must be uploaded before the associated Announcement can be published.



See chapter 10.4.2, Remarks for details on the recommended format for the .wav files to be used as media prompts

- A message is displayed to indicate that the Prompts were successfully uploaded and saved. The files uploaded automatically appear next to the corresponding names.

Prompt Management

5 files uploaded successfully. Upload Prompt Files...

Name	File Name	Play
and	and_V1_bf087fc1-feaf-e611-a850-00155d0b3a3e.wav	
Approximately	Approximately_V1_c1087fc1-feaf-e611-a850-00155d0b3a3e.wav	
hour	hour_V1_c3087fc1-feaf-e611-a850-00155d0b3a3e.wav	
hours	hours_V1_c5087fc1-feaf-e611-a850-00155d0b3a3e.wav	
L0	L0_V1_c7087fc1-feaf-e611-a850-00155d0b3a3e.wav	
L1		
L2		
L3		
L4		
L5		
L6		

- Once all the files have been uploaded, Click **Save & Close** to exit the Media Prompt.



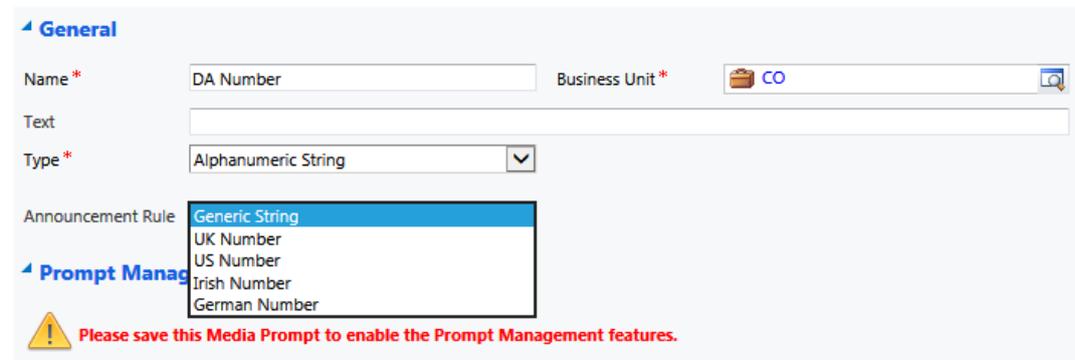
A Media Prompt is not published on its own but is published when an Announcement that uses it is published. For publishing instructions, refer to chapter 10.7, Publishing an Announcement

- Continue on to chapter 10.7, Publishing an Announcement

10.4.5 Alphanumeric String Media Prompts

Please see chapter 10.4.3, Standard Media Prompts for the first steps of the Media Prompt creation until the point where the Type is selected. If

the Type-field is changed to **Alphanumeric String**, the dialog displays an additional *Announcement Rule*:



General

Name * DA Number Business Unit * CO

Text

Type * Alphanumeric String

Announcement Rule

- Generic String
- UK Number
- US Number
- Irish Number
- German Number

Prompt Management

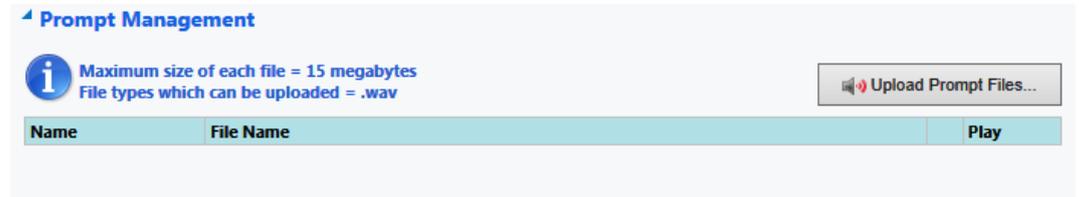
 Please save this Media Prompt to enable the Prompt Management features.

- 1 Select the *Announcement Rule* for the application:

Announcement Rule	Description
Generic String	Use for any generic string of alphanumeric characters *e.g. reference or booking numbers, postcodes, etc.) The string is announced one character at a time with rising, neutral and falling prompts used for each group. Groups are marked by separators like space or brackets. If there are no separators, the whole string is one group. Examples: “Y7SJM9”: LY,C7,CS,CJ,CN,R9 “TW16 7HT”: LT,CW,C1,R6,Space,L7,CH,RT
UK Number	Standard UK Telephone Number announcement rules
US Number	Standard US Telephone Number announcement rules
Irish Number	Standard Irish Telephone Number announcement rules
German Number	Standard German Telephone Number announcement rules

2 Click **Save**.

The Prompt Management section appears in the dialog. For **Alphanumeric String** Media Prompts it looks like this:



The Prompt Management section is empty at first but supports the controlled upload of up to 457 different prompts as per the table below. All prompts are optional and the Media Prompt can be successfully saved and published with just a minimal set of prompts. It is the responsibility of the solution writer to ensure all the prompts required for the application have been uploaded (e.g. for UK Number, all the letters can be left out). The following table lists all the Prompts that can be uploaded.

Prompt files (xxx.wav) must be named as per the table below before they are uploaded. The table gives the official order of the prompts reading from left to right and then down (e.g. L0, C0, R0, L1, etc.)

Rising	Neutral	Falling	Description/Utterance
L0.wav	C0.wav	R0.wav	Zero or "Oh"
L1.wav	C1.wav	R1.wav	One
L2.wav	C2.wav	R2.wav	Two
L3.wav	C3.wav	R3.wav	Three
L4.wav	C4.wav	R4.wav	Four
L5.wav	C5.wav	R5.wav	Five
L6.wav	C6.wav	R6.wav	Six
L7.wav	C7.wav	R7.wav	Seven
L8.wav	C8.wav	R8.wav	Eight
L9.wav	C9.wav	R9.wav	Nine
L0d.wav	C0d.wav	R0d.wav	Double zero or double "oh"
L1d.wav	C1d.wav	R1d.wav	Double One
L2d.wav	C2d.wav	R2d.wav	Double Two
L3d.wav	C3d.wav	R3d.wav	Double Three
L4d.wav	C4d.wav	R4d.wav	Double Four
L5d.wav	C5d.wav	R5d.wav	Double Five
L6d.wav	C6d.wav	R6d.wav	Double Six
L7d.wav	C7d.wav	R7d.wav	Double Seven

Rising	Neutral	Falling	Description/Utterance
L8d.wav	C8d.wav	R8d.wav	Double Eight
L9d.wav	C9d.wav	R9d.wav	Double Nine
L01.wav	C01.wav	R01.wav	Zero-One or Oh-One
L02.wav	C02.wav	R02.wav	Zero-Two
L03.wav	C03.wav	R03.wav	Zero-Three
L04.wav	C04.wav	R04.wav	Zero-Four
L05.wav	C05.wav	R05.wav	Zero-Five
L06.wav	C06.wav	R06.wav	Zero-Six
L07.wav	C07.wav	R07.wav	Zero-Seven
L08.wav	C08.wav	R08.wav	Zero-Eight
L09.wav	C09.wav	R09.wav	Zero-Nine
L10.wav	C10.wav	R10.wav	Ten
L11.wav	C11.wav	R11.wav	Eleven
...	All the numbers between twelve and ninety eight
L99.wav	C99.wav	R99.wav	Ninety nine
L100.wav	C100.wav	R100.wav	One hundred
L200.wav	C200.wav	R200.wav	Two hundred
L300.wav	C300.wav	R300.wav	Three hundred
L400.wav	C400.wav	R400.wav	Four hundred
L500.wav	C500.wav	R500.wav	Five hundred
L600.wav	C600.wav	R600.wav	Six hundred
L700.wav	C700.wav	R700.wav	Seven hundred
L800.wav	C800.wav	R800.wav	Eight hundred
L900.wav	C900.wav	R900.wav	Nine hundred
L1000.wav	C1000.wav	R1000.wav	Thousand
LA.wav	CA.wav	RA.wav	A
LB.wav	CB.wav	RB.wav	B
...	All the remaining letters of the alphabet
LZ.wav	CZ.wav	RZ.wav	Z
	space.wav		A short silent prompt for the space character
LStar.wav	CStar.wav	RStar.wav	Star
L#.wav	C#.wav	R#.wav	Hash
L-.wav	C-.wav	R-.wav	Dash or Hyphen
L+.wav	C+.wav	R+.wav	Plus

The Prompts can be uploaded one by one or by batches. Once the Prompts have been uploaded, the form looks like this:

The screenshot shows the 'Media Prompt' configuration page for 'Announce Number'. At the top, it displays 'Announcement Media Prompt' as 'Announce Number2', 'Saved Version' as '1', 'Published Version' as '1', and 'Updated' as 'No'. Below this is a 'General' section with fields for 'Name' (Announce Number), 'Business Unit' (CO), 'Text', 'Type' (Alphanumeric String), and 'Announcement Rule' (Irish Number). The 'Prompt Management' section includes an information icon stating 'Maximum size of each file = 15 megabytes' and 'File types which can be uploaded = .wav', along with an 'Upload Prompt Files...' button. A table lists 14 prompts (L0 to L14) with their respective file names and play controls.

Name	File Name	Play
L0	L0_V1_c67d4859-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
C0	C0_V1_bcf22f53-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
R0	R0_V1_4324a4ba-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
L1	L1_V1_ca7d4859-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
C1	C1_V1_c0f22f53-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
R1	R1_V1_4724a4ba-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
L2	L2_V1_ce7d4859-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
C2	C2_V1_c4f22f53-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
R2	R2_V1_4b24a4ba-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
L3	L3_V1_d27d4859-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
C3	C3_V1_c8f22f53-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
R3	R3_V1_4f24a4ba-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]
L4	L4_V1_67d4859-dc74-e611-9411-00155d0b5229.wav	[+][▶][⏮][⏭]

- 3 Once all the files have been uploaded, Click **Save & Close** to exit the Media Prompt.

- 4 **Alphanumeric String** Media Prompts announce the string provided at runtime in the Announcement Routing Step that invokes the Announcement. Please see chapter 7.5.2, Announcement for details.

The screenshot shows a configuration window for a Routing Step. At the top, it displays the step name 'Error-Announcement-DefaultRoutingStep-DefaultR...' and a 'Routing Steps' dropdown menu. Below this, there are fields for 'Routing Plan' (Handling), 'Saved Version' (1), and 'Updated' (No). The 'General' section contains a 'Name*' field with 'Announce DA Number', a 'Business Unit*' dropdown with 'CO', and a 'Type' dropdown with 'Announcement'. There is also a 'Default Next Step' field. The 'Announcement' section has an 'Announcement*' field with a speaker icon and 'Announce Number'. At the bottom, a table lists 'Announcement String' with the value 'strDANumber', which is highlighted by a red border.



A Media Prompt is not published on its own but is published when an Announcement that uses it is published. For publishing instructions, refer to chapter 10.7, Publishing an Announcement

- 5 Continue on to chapter 10.7, [Creating an Announcement Media Prompt](#)

10.5 Editing Media Prompts

When Announcements are published, they acquire the underlying Announcement Media Prompts and Media Prompts. If you want to replace even a single .wav file (a Standard Media Prompt or a .wav file inside the other types), you must publish the Announcement again for the new audio to be played

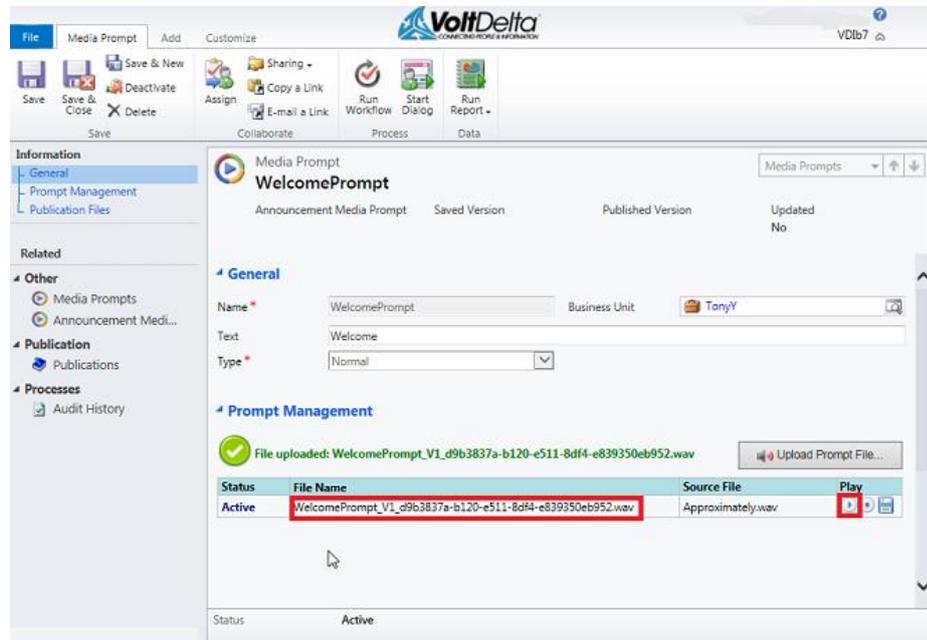
10.6 Playing an Uploaded Media Prompt

To listen to a Media Prompt that has already been uploaded to the Management Portal, proceed as follows:

- 1 In the Management Portal navigation pane, select **Prompt Management** → **Media Prompts**.

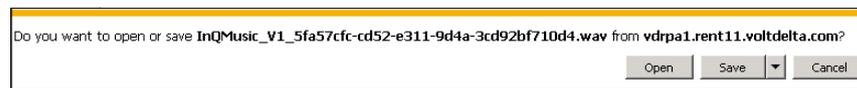
A list of the Active Media Prompts is displayed:

- Click the name of the Media Prompt that you want to review. Details for the Media Prompt are displayed:



- Click on either: the File Name of the .wav file or the Play icon to its right, shown above.

A message similar to the following is displayed near the bottom of the browser window:



- Do one of the following.
 - Click **Open** to play the file using the default media (.wav file) player for the Management Portal
 - Click **Save** → **Save as** to open a standard Windows “Save As” dialog where you can browse for a location to save the file. You can also specify a more intuitive name for the audio file

10.7 Creating an Announcement Media Prompt

An Announcement Media Prompt is configured with one or more Media Prompts to be played in a defined sequence. When you create an Announcement Media Prompt, you assign the following attributes to a sequence of Media Prompts that you have already uploaded:

- Display name

- Language
- Gender
- Persona

To create an Announcement Media Prompt, proceed as follows:

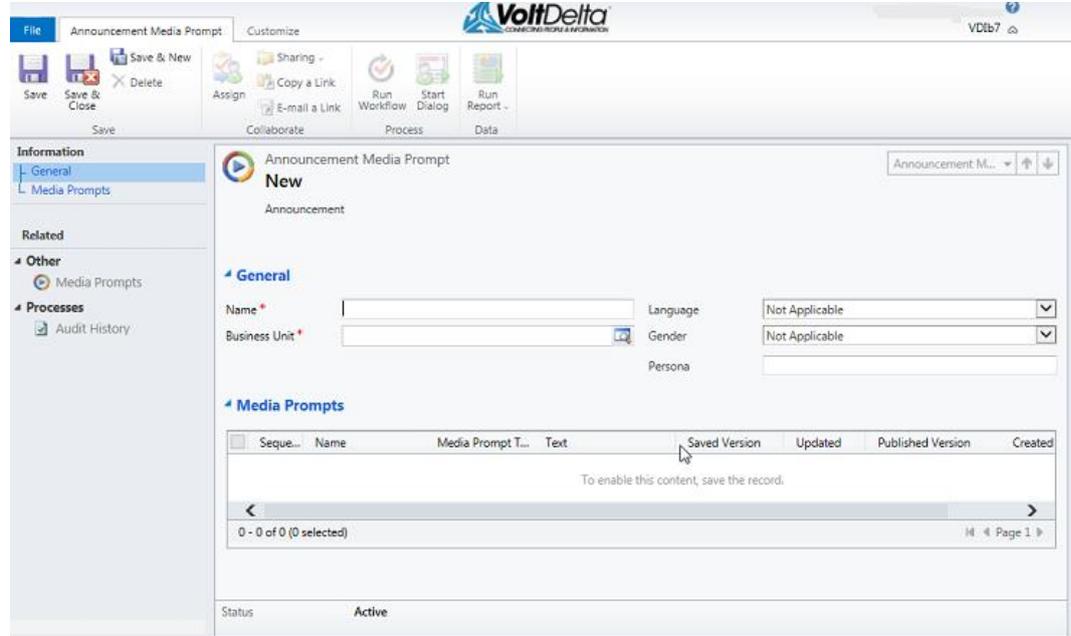
- 1 In the Management Portal navigation pane, select **Prompt Management** → **Announcement Media Prompts**.

The Active Announcement Media Prompts display in the right pane, as shown in the following figure

Name	Business Unit	Announcement	Language
MenuChoice	PABU2CTOP1	MenuAnnounce	
MenuChoiceRepeat	PABU2CTOP1	MenuAnnounceR	
QueMessage	PABU2CTOP1	QMessage	
QueMessage1	pabu2cc1	QMessage1	
QueMsg2	PABU2CTOP1	QMsg2	
QueMsg3	pabu2cc1	QMsg3	
QueRejection	PABU2CTOP1	QReject	English
Silence	PABU2CTOP1	VoitDelta Website	
TODdayofweek	PABU2CTOP1	TODspecialfriday	English
TODeverydaylunchclose	PABU2CTOP1	TODcloseluncheve	
TODexitclose	PABU2CTOP1	TODcloseholiday	
TODfridayspecial	PABU2CTOP1	TODspecialfriday	English
TODspecialhumday	PABU2CTOP1	TODhumdayspeci	
TODweekdayamclose	PABU2CTOP1	TODamcloseweek	
TODweekdayopen	PABU2CTOP1	TODopenweekday	
TODweekdaypmclose	PABU2CTOP1	TODpmcloseweek	

2 Click New in the ribbon

The Announcement Media Prompt dialog appears:



3 Complete the following fields in the dialog:

Field	Description
Name	Enter the display name you want to use for the prompt
Business Unit	Select the Business Unit to which this Announcement Media Prompt belongs
Language	Do one of the following: <ul style="list-style-type: none"> • Leave this field as “Not Applicable” to indicate the “default” language. • Select a language from the current language list to assign to the prompt. • Create a new language identifier from the Language Look Up Record dialog and select that language

Field	Description
Gender	<p>Do one of the following:</p> <ul style="list-style-type: none"> • Leave this field as “Not Applicable” to indicate the “default” gender. • Select either Male or Female gender to assign to the prompt
Persona	<p>Do one of the following:</p> <ul style="list-style-type: none"> • Leave this field blank to indicate the “default” persona. • Select a persona from the current persona list to assign to the prompt. • Create a new persona identifier from the Persona Look Up Record dialog and select that language

- 4 Click **Save** to enable the Media Prompts table.
- 5 Click on the **Media Prompts** table

The **Add New Media Prompt** and **Add Existing Media Prompt** buttons appear in the ribbon.
- 6 Click **Add Existing Media Prompt**

The Look Up Records dialog is displayed, showing Media Prompts that have not yet been assigned to an Announcement Media Prompt
- 7 Select one or more desired Media Prompt(s) that you want to include in the Announcement Media Prompt.



You might want to use multiple Media Prompts to create an announcement using multiple .wav files for different parts of the announcement. This technique can also be used for the playing of music, where each audio track is a separate .wav file. The Media Prompts are played in the order listed.

8 Click **OK**

The record(s) now appear in the Media Prompts area:

 **Media Prompts**

<input type="checkbox"/>	Seque...	Name	Media Prompt T...	Text	Saved Version	Updated	Published Version...	Created	
<input type="checkbox"/>	1	Thank you intro	Normal	Thank you for calling	1	No		7/2/2	
<input type="checkbox"/>	2	Good bye	Normal	Good bye until next time		No		7/2/2	

1 - 2 of 2 (0 selected) Page 1

9 Review the order in which the Media Prompts are listed and make corrections, if necessary. Refer to chapter 10.5, [Editing an Announcement Media Prompt](#) for details

10 In the File menu, select **Save**, then click **Save & Close**.



To use the Announcement Media Prompt, it must be published. However, an Announcement Media Prompt is not published on its own, but is published when an Announcement that uses it is published. For publishing instructions, refer to chapter 10.7, [Publishing an Announcement](#).

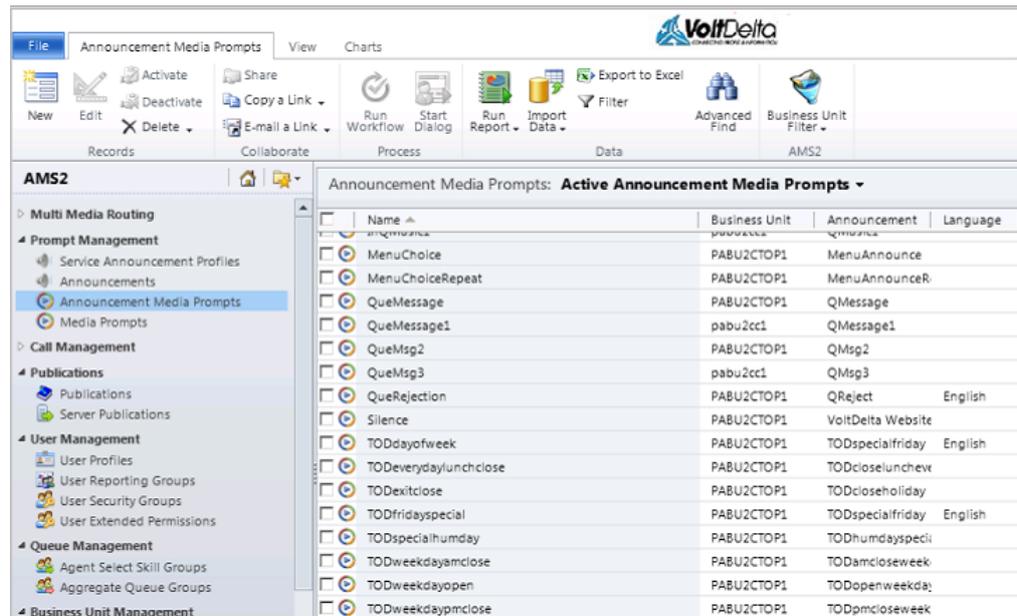
11 Continue with chapter 10.6, [Creating an Announcement](#).

10.5 Editing an Announcement Media Prompt

To edit the sequence or content of an existing Announcement Media Prompt, proceed as follows.

- 1 In the Management Portal navigation pane, select **Prompt Management** → **Announcement Media Prompts**.

The Active Announcement Media Prompts are displayed:



Name	Business Unit	Announcement	Language
MenuChoice	PABU2CTOP1	MenuAnnounce	
MenuChoiceRepeat	PABU2CTOP1	MenuAnnounceR	
QueMessage	PABU2CTOP1	QMessage	
QueMessage1	pabu2cc1	QMessage1	
QueMsg2	PABU2CTOP1	QMsg2	
QueMsg3	pabu2cc1	QMsg3	
QueRejection	PABU2CTOP1	QReject	English
Silence	PABU2CTOP1	VoltDelta Website	
TODdayofweek	PABU2CTOP1	TODspecialfriday	English
TODeverydaylunchclose	PABU2CTOP1	TODcloselunch	
TODexitclose	PABU2CTOP1	TODcloseholiday	
TODfridayspecial	PABU2CTOP1	TODspecialfriday	English
TODspecialhumday	PABU2CTOP1	TODhumdayspeci	
TODweekdayamclose	PABU2CTOP1	TODamcloseweek	
TODweekdayopen	PABU2CTOP1	TODopenweekday	
TODweekdaypmclose	PABU2CTOP1	TODpmcloseweek	

- 2 Click the name of the Announcement Media Prompt that you want to edit.

The Announcement Media Prompt dialog is displayed:

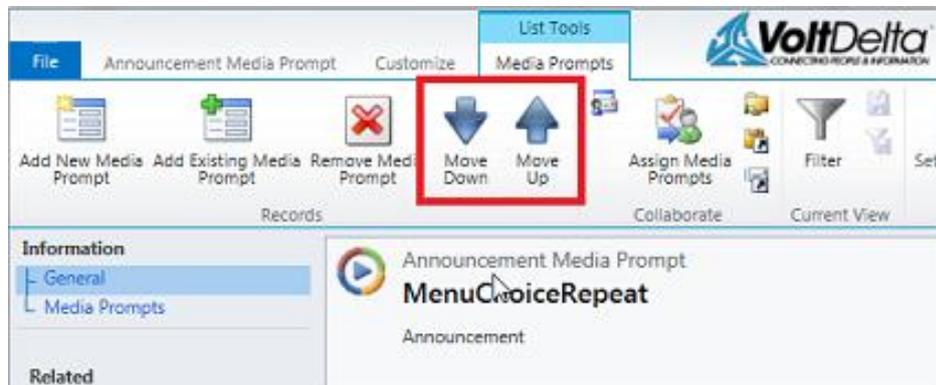
The screenshot shows the VoltDelta software interface for editing an Announcement Media Prompt. The main window is titled 'Announcement Media Prompt' and contains the following sections:

- File Menu:** Save, Save & Close, Deactivate, Delete, Save & New, Assign, Copy a Link, E-mail a Link, Run Workflow, Start Dialog, Run Report.
- Information Panel (Left):** General, Media Prompts, Related, Other, Media Prompts, Processes, Audit History.
- Main Content Area:**
 - Announcement Media Prompt: MenuChoiceRepeat**
 - General:** Name (MenuChoiceRepeat), Business Unit (Mobile21CC), Language (Not Applicable), Gender (Not Applicable), Persona.
 - Media Prompts Table:**

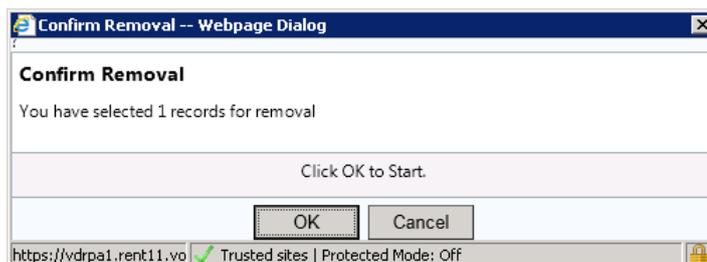
Seque...	Name	Media Prompt T...	Text	Saved Version	Updated
<input type="checkbox"/>	1 MenuRepeat	Normal	I will repeat the choices	1	No
<input type="checkbox"/>	2 MenuLand2Repeat	Normal	Your choices are: Press 1 for Sales, Pr...	1	No
 - Status:** Active

- 3 Click the **Media Prompts** table.
- 4 Do one or more of the following:
 - To *edit* the sequence in which the Media Prompts are played, select the check box next to a Media Prompt and then use the **Move Up** () and **Move Down** () arrows in the ribbon until

the Media Prompts appear in the correct sequence in the Sequence Number column.



- To *remove* a Media Prompt, select the check box next to the Media Prompt, then click **Remove Media Prompt** () in the ribbon. A confirmation message is displayed



Click **OK**.

- To *add* a new prompt, click **Add Existing Media Prompt** or **Add New Media Prompt** in the ribbon, Chapter 10.7, [Creating an Announcement Media Prompt](#) provides details.
- Click **Save & Close** in the ribbon.



To use the Announcement Media Prompt, it must be published. However, an Announcement Media Prompt is not published on its own, but is published when an Announcement that uses it is published. For publishing instructions, refer to chapter 10.7, [Publishing an Announcement](#).

10.6 Creating an Announcement

An Announcement contains one or more Announcement Media Prompts. If an Announcement record contains more than one Announcement

Media Prompt, the CDS selects the most appropriate Announcement to play, based on the Language, Gender, and Persona attributes of the current call being handled. The call Classification is one place where Language, Gender, and Persona attributes can be set.

Announcements can be played from Routing Plans or referenced by Service Announcement Profiles

To create an announcement, proceed as follows.

- 1 In the Management Portal navigation pane, select **Prompt Management** → **Announcements**, as shown in the following figure:.

The screenshot shows the VoIPDelta Management Portal interface. The left navigation pane is expanded to 'Prompt Management' > 'Announcements'. The main area displays a table of active announcements. The table has the following columns: Name, Business Unit, Saved Version, Updated, and Published Version. The table contains 20 rows of announcements, including 'colin announcement', 'COQMess1', 'Greeting', 'HoldMusic', 'MenuAnnounceRepeat', 'QMessage', 'QMessage1', 'QMsg2', 'QMsg3', 'QMusic', 'QMusic1', 'QReject', 'TODamcloseweekday', 'TODcloseholiday', 'TODcloseluncheveryday', 'TODcloseweekend', 'TODhumdayspecial', and 'TODopenweekday'.

Name	Business Unit	Saved Version	Updated	Published Version
colin announcement	colin_business_ur	2	No	
colin announcement	colin_business_ur	2	No	
COQMess1	PABU2CTOP1	2	No	
Greeting	PABU2CTOP1	5	No	
HoldMusic	pabu2ctc1	2	Yes	
MenuAnnounce	PABU2CTOP1	5	No	
MenuAnnounceRepeat	PABU2CTOP1	6	No	
QMessage	PABU2CTOP1	3	No	
QMessage1	pabu2ctc1	5	No	
QMsg2	PABU2CTOP1	6	No	
QMsg3	pabu2ctc1	2	Yes	
QMusic	PABU2CTOP1	2	No	
QMusic1	pabu2ctc1	2	No	
QReject	PABU2CTOP1	2	No	
TODamcloseweekday	PABU2CTOP1	2	No	
TODcloseholiday	PABU2CTOP1	2	No	
TODcloseluncheveryday	PABU2CTOP1	2	No	
TODcloseweekend	PABU2CTOP1	2	Yes	
TODhumdayspecial	PABU2CTOP1	2	No	
TODopenweekday	PABU2CTOP1	2	No	

2 Click **New** in the ribbon

The New Announcement dialog is displayed:

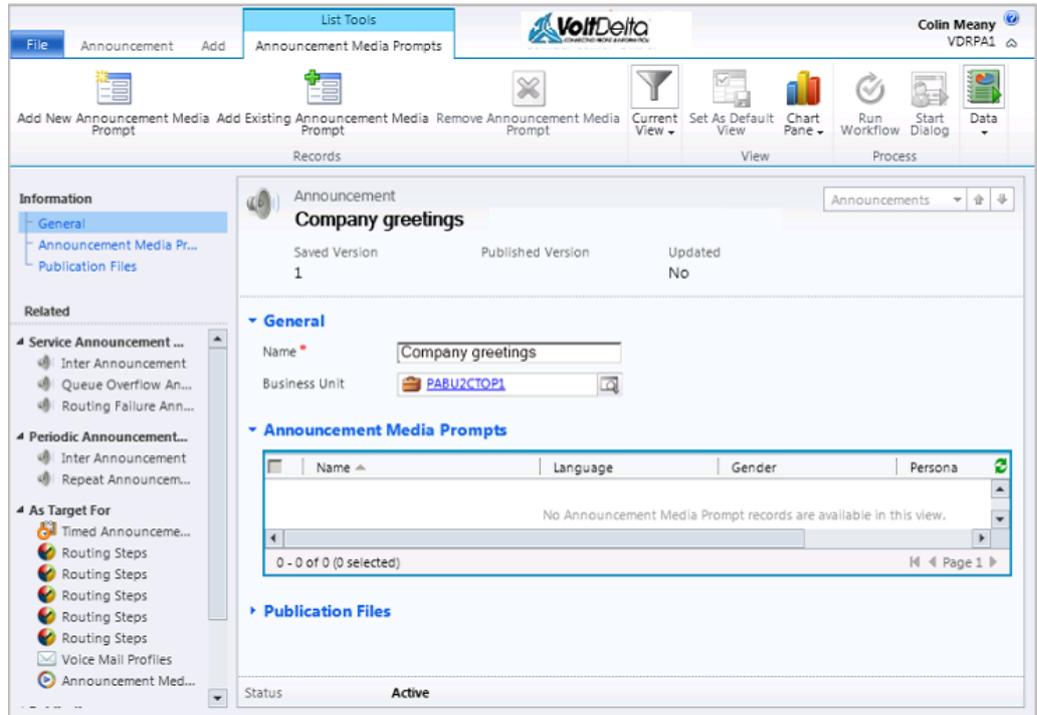
The screenshot shows the 'New Announcement' dialog in the VoIPDelta interface. The ribbon at the top includes 'File', 'Announcement', and 'Add'. The 'File' ribbon has buttons for 'Save', 'Save & Close', 'Publish', and 'Delete'. The 'Announcement' ribbon has buttons for 'Save & New', 'Sharing -', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report -'. The 'Add' ribbon has buttons for 'Collaborate', 'Process', and 'Data'. The main area is titled 'Announcement New' and shows a table with columns for 'Saved Version', 'Published Version', and 'Updated', with 'Updated' set to 'No'. Below this are sections for 'General' (Name and Business Unit fields), 'Announcement Media Prompts' (a table with columns for Name, Language, Gender, and Persona), and 'Publication Files'. The status bar at the bottom indicates 'Active'.

3 Complete the following fields:

- In the Name field, enter the name of the announcement
- In the Business Unit field, select the Business Unit to which this Announcement belongs

4 Click Save

The Announcement Media Prompts area is enabled.



- Click anywhere inside the Announcement Media Prompts table, then click **Add Existing Announcement Media Prompt** on the ribbon

The Look Up Records dialog for Announcement Media Prompts is displayed, listing the Announcement Media Prompts that are not yet associated with an Announcement.

Look Up Records
Select the type of record you want to find and enter your search criteria. Filter your results and view different columns of data by using the View options. Repeat this process for different types of records.

Look for: Announcement Media Prompt Show Only My Records

View: Filtered Announcement Media Prompt View

Search: Search for records

<input checked="" type="checkbox"/>	Name	Business Unit	Announcement	Lang
<input checked="" type="checkbox"/>	Greeting ENG	PABU2CTOP1		
<input checked="" type="checkbox"/>	Greeting SP	PABU2CTOP1		

1 - 2 of 2 (2 selected) Page 1

Selected records:

Add Remove Properties New

OK Cancel

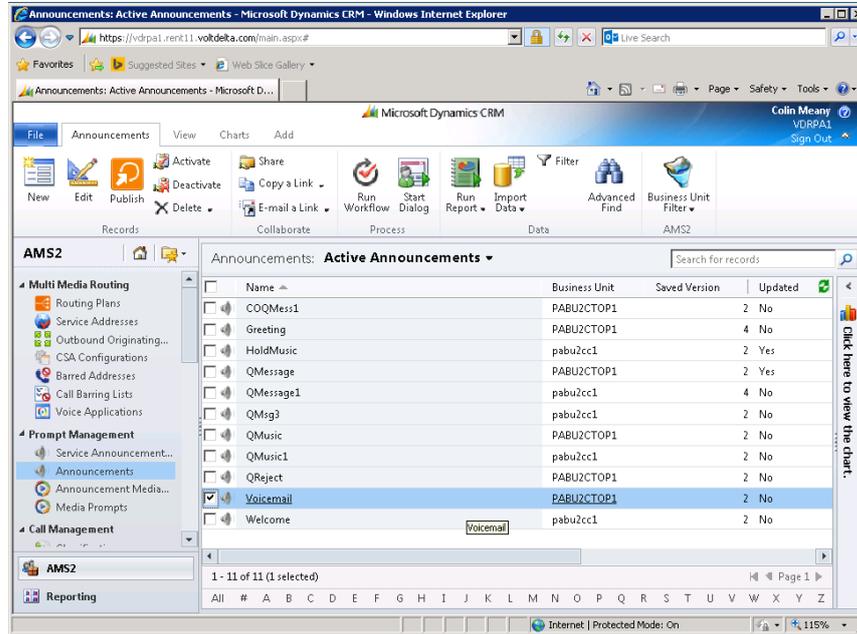
- Select the desired Announcement Media Prompt(s), and then click **OK** to confirm your selection and return to the Announcement dialog.
- Click **Save & Close**.
- To make the Announcement available for use on calls, it must be published. To publish the Announcement, continue with chapter 10.7, [Publishing an Announcement](#)

10.7 Publishing an Announcement

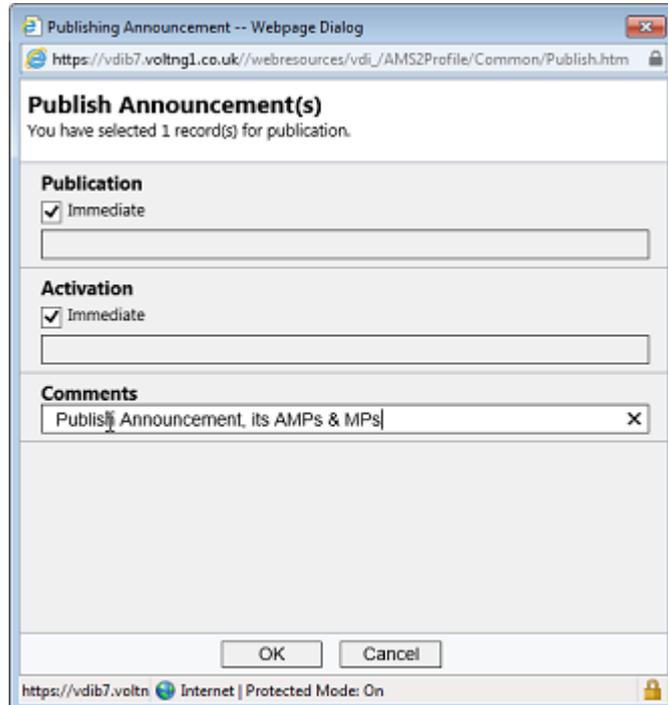
Publishing an Announcement also publishes the related Media Prompts
To publish an announcement, proceed as follows.

- In the Management Portal navigation pane, select **Prompt Management** → **Announcements**.

- Click the check box next to the desired Announcement and click **Publish** in the ribbon.



The Confirm Publishing Announcement dialog is displayed:



- 3 Optionally, enter the following information:
 - Publication—This field allows you to specify a time at which the item will be published. By default, Immediate is selected so the item is published when you click OK
 - Activation—This field allows you to specify a time at which the item will be activated on the target server. This is useful for grouping multiple changes to take effect at the same time. For example, changes can be made to multiple items, and then all these changes can be activated together at midnight. By default, Immediate is selected so that item is activated when you click OK
- 4 In the Comments field, enter a comment describing the reason for publishing.
- 5 Click **OK** to publish the Announcement.

10.8 Working With Service Announcement Profiles

Service Announcement Profiles define the music and Announcements to play for calls. Service Announcement Profiles are used for the following events:

- In-Queue Treatment—Announcement played while a caller waits in queue
- On Hold A-Party Treatment—Announcement played to the A-Party while on hold.
- On Hold B-Party Treatment—Announcement played to the B-Party while on hold.

A Service Announcement Profile also contains Periodic Announcement Profiles, whereby the timing and intervals for announcements are specified.

A Service Announcement Profile can be configured for a Classification or a Queue. In cases where both the current Classification and Queue have Service Announcement Profile assignments,, the logic uses a matching algorithm to select the best Service Announcement Profile to use for the call. The algorithm uses the following order of precedence:

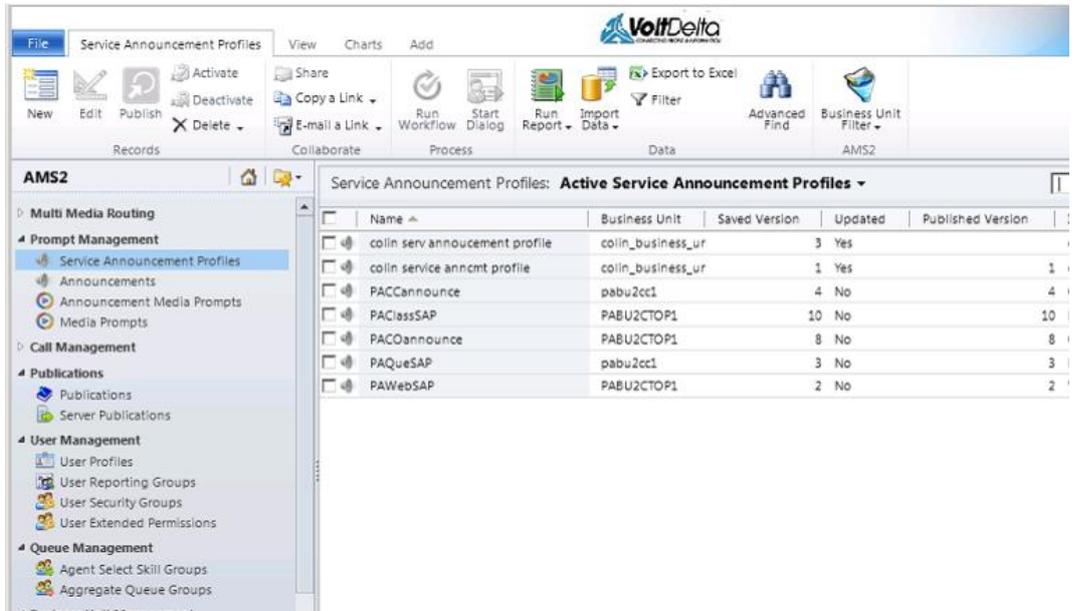
1. Current Classification
2. Current Queue
3. If a Service Announcement Profile is defined for neither Classification nor Queue, the following default values are used:
 - For the In-Queue Treatment, ringing is played

- For the On-Hold treatment, silence is played

10.8.1 Creating a Service Announcement Profile

To create a Service Announcement Profile, proceed as follows.

- 1 In the Management Portal navigation pane, select **Prompt Management** → **Service Announcement Profiles**.



2 Click **New** in the ribbon

The New Service Announcement Profile dialog is displayed:

- 3** Enter a Name for the Service Announcement Profile When specifying a name, do not enter the apostrophe character (')
- 4** Select the Business Unit to which this Service Announcement Profile belongs.
- 5** Define a Periodic Announcement Profile for each of the following fields
 - In-Queue Profile,
 - On-Hold A-Party Profile
 - On-Hold B-Party Profile



For details, refer to chapter 10.8.1.1, [Creating a Periodic Announcement Profile](#).

- 6** Click **Save & Close**.

10.8.1.1 Creating a Periodic Announcement Profile

A Periodic Announcement Profile defines the configuration of *Repeat* announcements and *Timed* announcements, which are played at

specified times while the caller is placed in Queue or On Hold, as well as the ringing or music that is played between announcements.

Note the following about Repeat and Timed announcements:

- Repeat announcements enable you to specify the initial interval after entering the queue that the selected announcement plays for the first time and the intervals (for example, every 10 seconds) between repetitions of the announcement. With a Repeat announcement, the same announcement is played to the caller.
- Timed announcements enable you to select one or more different announcements and set them to play at a different time than the Repeat announcement. For example, the basic Repeat announcement could be set to play every 40 seconds, and a different Timed announcement could be set to play every 20 seconds.
- If the Repeat and Timed announcements are scheduled to play at the same time, the Timed Announcement is played. To provide variety in the announcements callers hear while waiting, you can specify a Repeat announcement and several different Timed announcements.

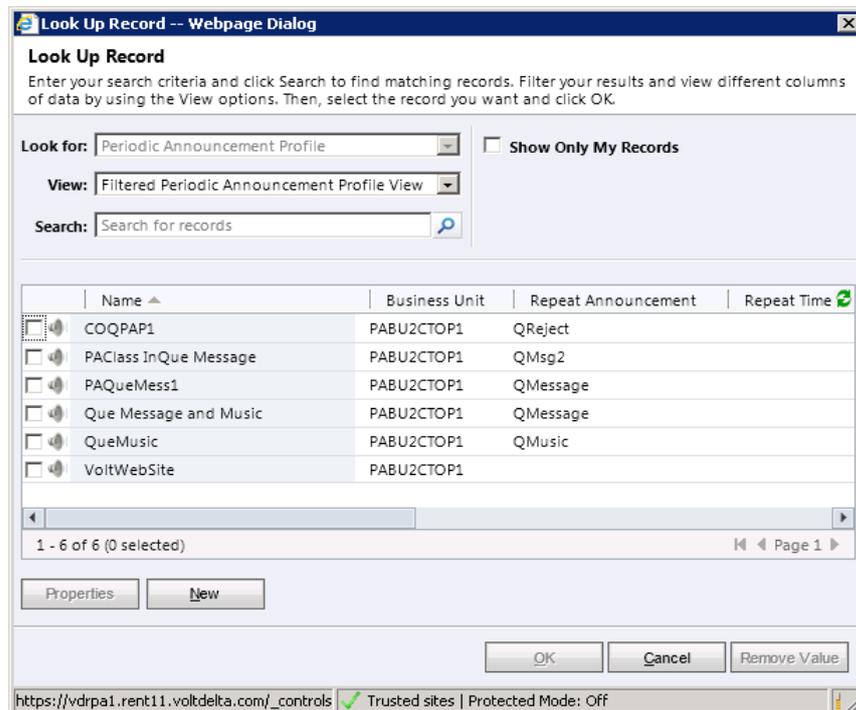
A Periodic Announcement must be specified for the following events:

- In Queue Profile
- On Hold A-Party Profile
- On Hold B-Party Profile

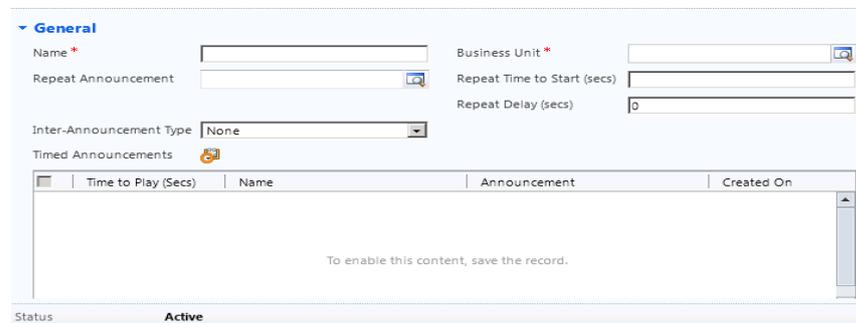
To create a Periodic Announcement Profile, proceed as follows:

- 1 Click the button to the right of the one of the following fields:
 - In Queue Profile
 - On Hold A-Party Profile
 - On Hold B-Party Profile

The Look Up Record dialog for Periodic Announcement Profiles is displayed:



- 2 Click **New** to create a new Periodic Announcement Profile.
The Periodic Announcement Profile dialog is displayed.



- 3 Complete the following fields:

- Name - enter the name of the new Periodic Announcement Profile
 - Business Unit - select the Business Unit to which this profile belongs
- 4 Optionally, click the button next to the **Repeat Announcement** field and either select an existing Announcement to play or create a new Announcement.

The Repeat Announcement is repeated as defined by the **Repeat Time To Start** and **Repeat Delay** fields



A Timed Announcement is played instead of a Repeat Announcement if both are scheduled to play at the same time

- 5 In the **Repeat Time To Start (secs)** field, enter the time after which to start playing the Repeat Announcement. The timing begins with the start of Queuing/On-Hold. A value of 0 causes the announcement to play immediately. For example, *Please hold, an agent will be with you shortly.*
- 6 In the **Repeat Delay (secs)** field, enter the time to delay after the last Repeat Announcement or Timed Announcement has completed before playing it again.



The initial Repeat Time to Start (secs) must have expired before the Repeat Delay is used on subsequent announcements

- 7 In the Inter Announcement Type field, select one of the following types:

Type	Description
Ringing	Plays a ringing tone between announcements.
Music	Plays music or another call progress tone. The Music to play is defined by an Announcement assigned through the Music field, which is displayed when you select the Music option and click Save .
None	The caller hears silence.

- 8 Optionally, configure Timed Announcements as follows.
- a. Click **Save** to enable the Timed Announcements table.
 - b. Click the Timed Announcements table to select it, and then click **Add Existing Timed Announcement**.

The Look Up Records dialog for Timed Announcements is displayed.

- c. Click **New** to create a new Timed Announcement.

The New Timed Announcement dialog is displayed.

- d. In the Name field, enter the name of the Timed Announcement.
- e. In the Business Unit field, select the Business Unit to which this Timed Announcement belongs.
- f. In the Announcement field, select the Announcement to play. This can be an existing Announcement or you can create a new one at this stage.
- g. In the Time to Play (secs) field, enter the time in-queue after which the announcement will play.



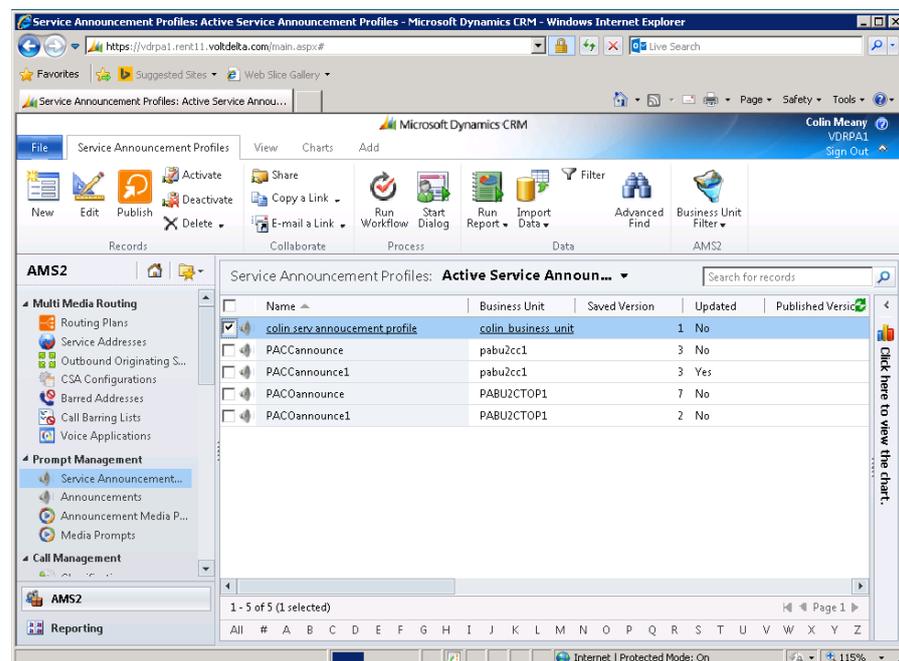
Note that the Time to Play is always measured from the beginning of the Queue wait time. For example, specify 15 for the first, 30 for the second, and 45 for the third Timed Announcement to play the respective Announcements 15 seconds, 30 seconds, and 45 seconds after the start of the Queue wait time.

- h. Click **Save & Close** to return to the Look Up Record dialog. The newly added timed announcement appears in the Selected records area.
- i. Click **OK** to add the Timed Announcement.
- j. Add additional Timed Announcements if required.
- 9 In the Periodic Announcement Profile dialog, select the **Periodic Announcement Profile** tab in the ribbon, then click **Save & Close**.

10.8.2 Publishing Service Announcement Profiles

To publish a Service Announcement Profile, proceed as follows.

- 1 Ensure that you have published all Announcements that are referenced by the Service Announcement Profile
- 2 In the Management Portal navigation pane, under Prompt Management, select **Service Announcement Profiles**
- 3 Click the check box next to the desired Service Announcement Profile and click **Publish** in the ribbon.



The Confirm Publishing Service Announcement dialog is displayed.

Publishing Service Announcement -- Webpage Dialog
https://vdiib7.voltng1.co.uk/webresources/vdi_AMS2Profile/Common/Publish.htm

Publish Service Announcement(s)
You have selected 1 record(s) for publication.

Publication
 Immediate
[Empty text field]

Activation
 Immediate
[Empty text field]

Comments
Publish one or more Service Announcement Profiles

[Empty text area]

OK Cancel

https://vdiib7.voltn Internet | Protected Mode: On

- 4 Optionally, enter the following information
 - Publication—This field allows you to specify a time at which the item will be published. By default, Immediate is selected so that item is published when you click **OK**
 - Activation—This field allows you to specify a time at which the item will be activated on the target server. This is useful for grouping multiple changes to take effect at the same time. For example, changes can be made to multiple items, and then all these changes can be activated together at midnight. By default, Immediate is selected so that item is activated when you click **OK**
- 5 In the Comments field, enter a comment describing the reason for publishing
- 6 Click **OK** to publish the Service Announcement Profile

11 User Management

11.1 Overview

Users belong to a Business Unit and have different roles and security access, depending on whether the User will handle calls or perform administrator functions.

This chapter includes the following chapters:

- User Management Overview
- Creating a User
- Editing a User
- Deleting a User
- Deactivating a User
- Activating a User
- Configuring an External Account User
- Configuring a Team Leader User

11.2 User Management Overview

OASIS accommodates the following types of users:

- Agents—Provide call-handling services. Note that Agent users can be created who have supervisory roles with regard to other agents.
- Administrators—Have supervisory permissions for observing Agent Users and reviewing call recordings. Administrator users can perform Management Portal functions, view reports, and create other users.

Once created, Users need to be organized into the following units:

- User Reporting Groups—Entities that are shared to enable Users to access the Group and its members. Refer to Chapter 5.2, [User Reporting Groups](#).
- User Security Groups—Define privileges and the features the Users can access. Refer to chapter 12.2, [User Security Groups](#)

Depending on the workforce strategy of your company, the administrator must create one or more of the following to enable Agent Users to receive and service calls:

- Individual Queues.
- Aggregate Queues, which are collections of one or more Queues.

- Agent Select Skill Groups, which are collections of Queues that an Agent can selectively log on to.

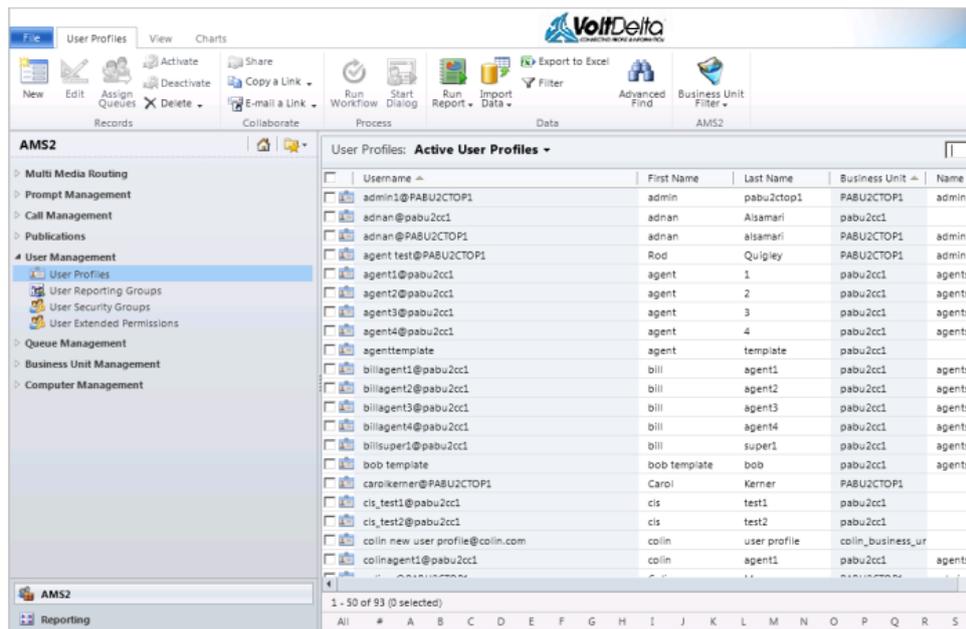
Once these have been defined, the administrator assigns Agent Users to these Queues (although Users can also be assigned to simple individual Queues.) Chapter 13, [Managing Queues and Skill Sets](#) provides information on creating these entities and assigning users to them.

11.3 Creating a User

The Management Portal includes default templates to enable you to more quickly create users. A template is specific to a Business unit and can only be used to create Users for that Business unit. The template contains predefined values that are appropriate for your Business unit, so that minimal editing is typically required when using the template to create a new user

To create a User Profile, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management → User**.



2 Click **New** in the ribbon.

The New User Profile dialog is displayed:

3 In the Username field, enter a user name in the following format:.

Name@Domain

where *Domain* is supplied by your system administrator.



If you are using the template from the Business Unit (by selecting the option, from the Created From look-up from) you do not need to add the domain to the user name. The domain is copied from the Business Unit value.

The “Is Template?” option can be used to create your own User Profile templates.

4 Click the button next to the Created From field and select a template



User Profiles must always be created from a template for the required Business Unit.

5 Select the Role for the User. In the example in step 8, the Agent Role is selected.

6 In the **First Name** and **Last Name** fields, enter the user’s first and last name. When specifying a name, do not enter the apostrophe character (’).



When creating administrator users, always append the Business Unit name to the Last Name. This enables the Business Unit to be displayed on the Management Portal screens along with the user name.

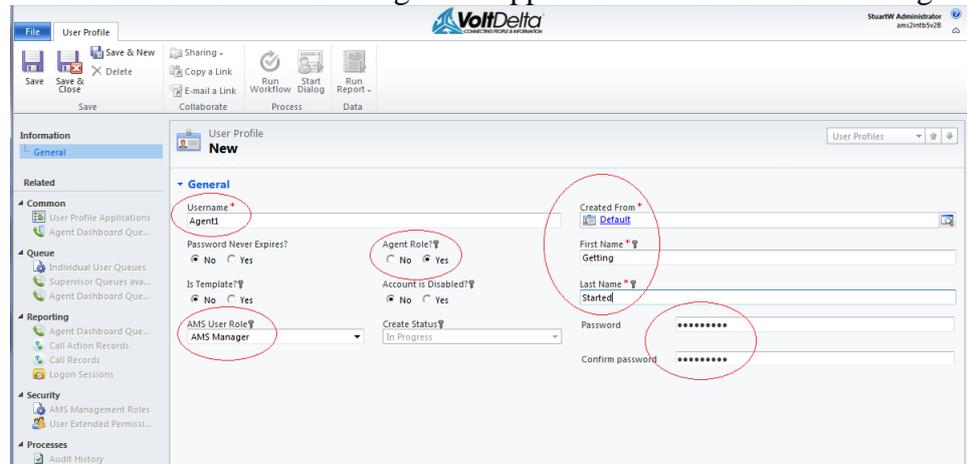
- 7 In the **Password** field, enter a password for the user.
- 8 In the Management Portal User Role field, click the down arrow and select one of the following roles:.

User Role	Description
None	Used for creating Agent Users.
Reporter	Used for Reporting Users.
Manager	Used for creating Administrator Users



Users can be both Agents and Management Portal Managers/Reporters.

The New User Profile dialog now appears similar to the following.



- 9 Click **Save**.
All the properties for the User Profile now appear in the dialog.
- 10 Click **Save & Close** to close the dialog with all the properties set to their default values.



If you are creating an administrator user, continue with chapter 11.3.1, [Additional Steps for Creating Administrative Users](#)

11.3.1 Additional Steps for Creating Administrative Users

The following chapters describe additional steps to perform if the user will have an administrator role:

- Assigning Management Portal Management Roles to Users
- Granting User Access to the Observe Functions
- Granting User Access to the Call Recording Playback

11.3.1.1 Assigning Management Portal Management Roles to Users

Management Portal management roles can be applied only to users with the following User roles:

- Reporter
- Manager



The Create Status field on the User Profile dialog must display “Complete” before you can assign Management Portal Management Roles to the User. For newly created Users, refresh the User Profile dialog display until the Create Status field changes from “In Progress” to “Complete.”.

To assign Management Roles to a User, proceed as follows

- 1 Open the User Profile to which you want to assign Management Portal Management Roles.



If the user has just been created, it might take several minutes for the user creation to complete before the Management Portal Management Roles selection is available.

- 2 In the left User Profile pane, select **Related** → **Security** → **Management Roles**

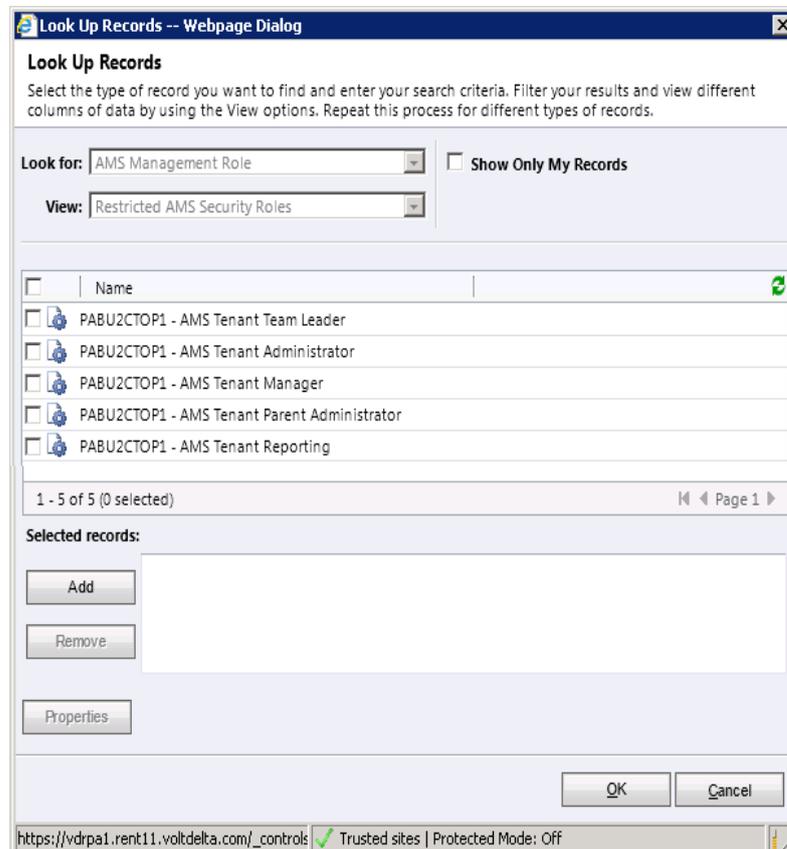
The Management Portal Management Roles view is displayed.

The screenshot displays the VoltDelta user management interface. The left-hand navigation pane is expanded to the 'Related' section, where the 'Security' category is selected, and the 'Management Roles' option is highlighted with a red circle. The main content area shows the 'User Profile' for 'admin1@PABU2CTOP1'. Below the profile information, a table titled 'AMS Management Roles: AMS Management Role Associated View' is displayed. The table contains one entry:

Name	Business Unit	Created On
PABU2CTOP1 - AMS Tenant Parent Administrator	PABU2CTOP1	6/5/2014 9:11 PM

The interface also includes a top navigation bar with 'File', 'User Profile', and 'AMS Management Roles' tabs, and a toolbar with various actions like 'Add Existing AMS Management Role', 'Remove', 'Copy a Link', 'E-mail a Link', 'Filter', 'Save Filters', 'Save Filters as New View', 'Set As Default View', 'Chart Pane', 'Run Workflow', 'Start Dialog', 'Run Report', and 'Export AMS Management Roles'. The bottom status bar indicates the user's status as 'Active'.

- 3 Click **Add Existing Management Role** in the ribbon.
The Management Roles Selection dialog is displayed.



- 4 Select the Management Role(s) you wish to assign to the user.
- 5 The following roles are available:
 - **Tenant Team Leader**—Provides the following access appropriate to Agent Team Leaders/Supervisors within a Tenant:

- Read privileges for Users, Workstations, and Call Types shared with them
- Ability to create Dynamic Reports on elements visible to the user role

Tenant Team Leaders can also be assigned additional roles to extended their capabilities:

- **Tenant Agent Queue Manager**—Provides access to allow a Team Leader to manage the Queues for the agents they are responsible.

- **Tenant Media Quota Manager**—Provides access to allow a Team Leader to manage the media quotas for the agents they are responsible.
- **Tenant Administrator**—Provides the following administration capabilities within the current Tenant Scope only:
 - Access to all entities based on assigned products.
 - Cannot manage child Business Units.
 - Can share objects.
- **Tenant Manager**—Provides the following access appropriate to Business Unit Managers within a Tenant:
 - Read-Only Business Unit access to all entities.
 - Ability to create CRM reports and Dashboards.
 - Write/Update access to any entity owned by the user.
 - Ability to create Dynamic Reports on elements visible to the user.
- **Tenant Parent Administrator**—Provides the highest level of administrative capability within a Tenant hierarchy and allows the management of child Business Units, along with the following:
 - Access to all entities based on assigned products.
 - Can manage all entities in the child Business Unit, based on products assigned.
 - Can share objects.
- **Tenant Reporting**—Provides access appropriate to reporting users within a Tenant and child Tenant.
 - Can Read Call Types/Call Type Groups and can report on Call Types/Call Type Groups that are visible.
 - Restricted options are displayed in the Management Portal navigation pane (limited to Reporting only)
 - Historical Reporting access only.



Users with this role only, require a limited license and not a full license

- 6 Click **Add** to add the Management Portal Management Role(s) to the selected records list.
- 7 Click **OK** to assign the selected Management Portal Management Role(s) to the User

11.3.1.2 Granting User Access to the Observe Functions

The Observe function allows a User (normally in a supervisory role) to monitor other Users' screens based on User Name or Classification. The supervisor can also break into the call being observed or take it over entirely. For details on the use of the Observe function, refer to the SmartStation User Guide , reference 2.

A User can be given access to observe Users (Agents), Classifications, or both, as follows:

- **Classification**—The Observer monitors the next call that has the specified Classification when it is given to an agent.
- **User**—The Observer monitors a selected User.



When a supervisor observes Agent (Observe by Name mode), the supervisor can observe calls of *all* Classifications an agent is answering, even if the Classification is not part of the Classification Security Group for which the supervisor is authorised..

To grant a User access to the Observe function on the workstation, proceed as follows:

- 1 Log in as the Administrator of the Contact Operation Business Unit in the Contact Centre BU and do the following:
 - a) Create a new Classification Security Group with the following properties:
 - **Name**—A unique name.
 - **Business Unit**—The Contact Centre Business Unit
 - **Classifications** table—Add the classifications that shouldbe observable..
 - b) Share the Classification Security Group with the Contact Centre Business Unit team, granting Read and Append permissions.



A Classification can be a member of only one Security Group.

- 2 Log in as the Administrator of the Contact Centre Business Unit in the Contact Centre Business Unit and do the following:
 - a) Create a new User Security Group in the Contact Centre Business Unit:
 - b) Assign the following properties to the new User Security Group:
 - **Name**—A unique name.
 - **Business Unit**—The Contact Centre Business Unit
 - **All users under this User Security Group** table—Add the agent users that should be observable.



A User can be a member of only one Security Group..

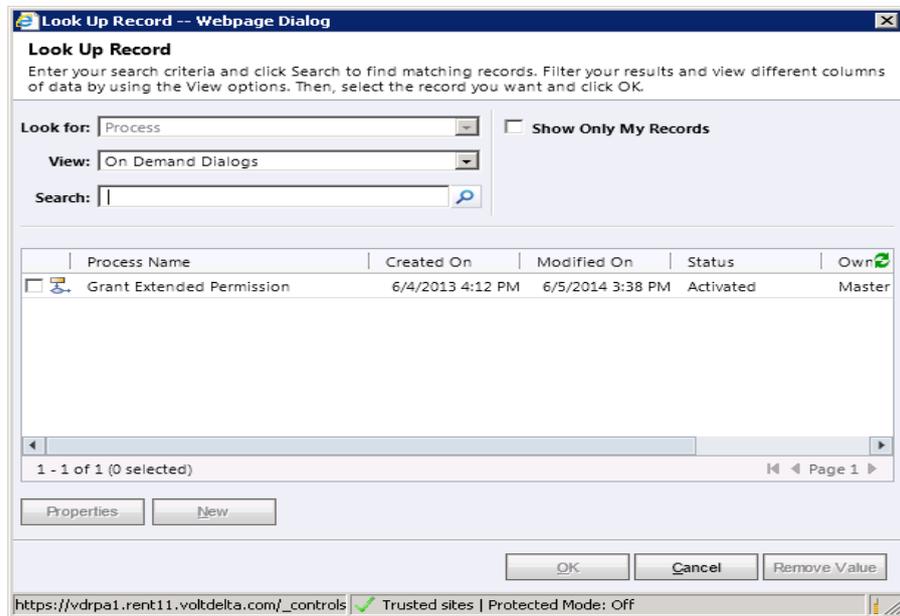
- 3 Edit the Supervisor User Profile to grant the supervisor user permissions to observe the Security Groups. The steps that follow describe the procedure:
- 4 In the Management Portal navigation pane, select **User Management → User Profiles**.
The list of Active User Profiles is displayed
- 5 Select the Name of the desired User Profile.
The User Profile dialog is displayed

The screenshot shows the 'User Profile' dialog for 'user1@accounta.demo.com'. The 'General' tab is active, displaying the following fields and values:

- Username:** user1@accounta.demo.com
- Business Unit:** DemoAccountA
- Password Never Expires?** Yes (selected)
- Agent Role?** Yes (selected)
- Is Template?** No (selected)
- Account Is Disabled?** No (selected)
- AMS User Role:** Reporter
- Create Status:** Completed
- Created From:** Default
- Time zone for Reporting:** [(GMT+01:00) Amsterdam, Berlin, ...]
- First Name:** User
- Last Name:** 1
- Password:** [Redacted]
- Confirm Password:** [Redacted]

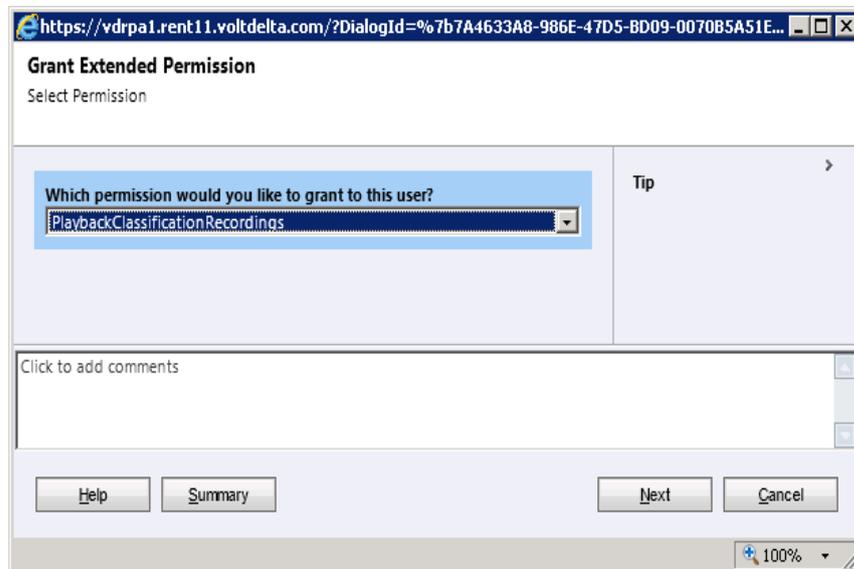
6 Click **Start Dialog** in the ribbon.

The Look Up Record dialog appears with the On Demand Dialog view of the Grant Extended Permission process:



7 Click **Grant Extended Permission**, then click **OK**.

The Grant Extended Permission dialog is displayed.



8 Select **ObserveAgents** or **ObserveClassifications**.

9 Add any desired comments, then click **Next**.

10 In the Security Group Lookup view, select the Group, then click **OK**.

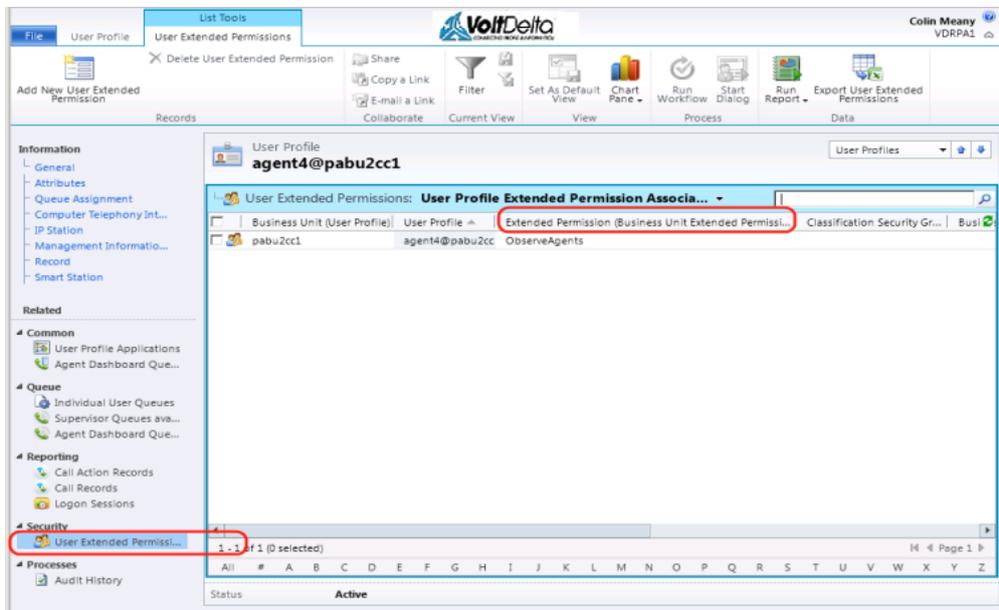
- 11 Add any desired comments, then click **Next**.
- 12 Click **Finish**.
- 13 To add further Extended Permissions for Observe, repeat from Step 6 as necessary.

Observe is now enabled for the user.



The Classification must be shared from the parent Business Unit.

- 14 Display the Extended Permissions dialog for the user and verify that permission is listed in the Extended Permissions column. (If required, you can also delete incorrect permissions from this dialog.)



11.3.1.3 Granting User Access to the Call Recording Playback

The Call Recording Playback feature enables authorized Users to play audio and video recording of selected calls. The user interface includes a filter function to enable such users to search for the desired recordings.



The Call Recording Playback feature is enabled for administrator users only. For information about using the Call Recording Playback feature, refer to the OASIS (11.5) MIS Reporting Guide (reference 5).

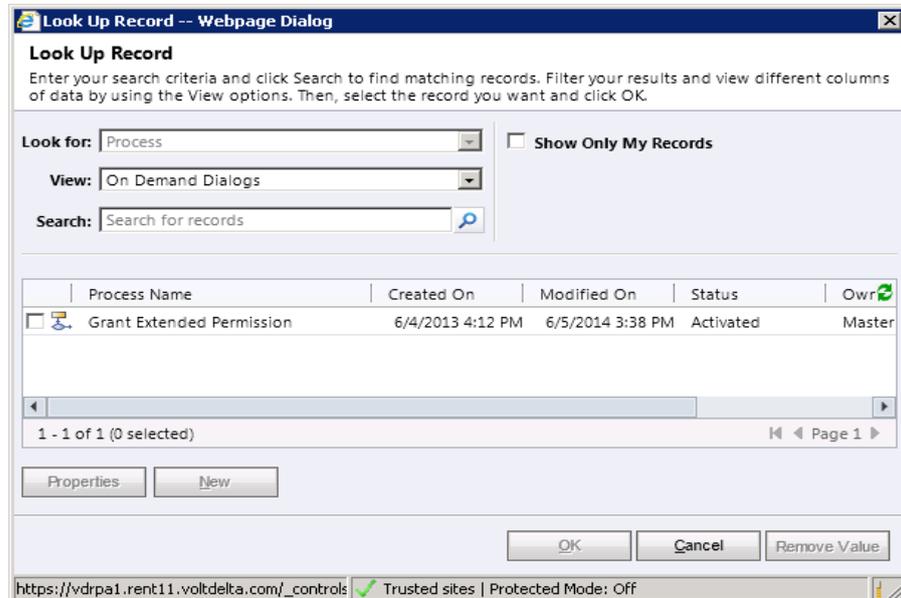
To grant a User access to Call Recording Playback, proceed as follows:

- 1 Create the Classifications and/or User Security Groups that you want playback (refer to chapter 3.4.1, [Creating a Classification](#) and chapter 12.2.1, [Creating a User Security Group](#)).
- 2 Add the Classification(s) and/or User(s) to these groups (see chapter 5.4.2, [Assigning a Classification to a Classification Reporting Group](#) and chapter 12.2.2, [Assigning a User to a User Security Group](#)).
- 3 In the Management Portal navigation pane, select **User Management** → **User Profiles**.
The list of Active User Profiles is displayed
- 4 Select the Name of the desired User Profile.
The User Profile dialog is displayed

The screenshot shows the 'User Profile' dialog for the user 'admin1@pa1.com'. The interface includes a menu bar with 'File', 'User Profile', and 'Customize'. Below the menu is a toolbar with icons for Save, Deactivate, Assign, Copy a Link, Run Workflow, Start Dialog, and Run Report. The main area is divided into sections: Information (General, Attributes, Queue Assignment, etc.), Related, Common, Queue, Reporting, Security, and Processes. The 'General' section is expanded, showing fields for Username (admin1@pa1.com), Business Unit (Product Assurance_BU_ONE), Password Never Expires?, Agent Role?, Reporting Role?, AMS Manager Role?, Is Template?, Account is Disabled?, First Name (G), Last Name (T), Password, and Confirm password. The 'Grouping' section shows the User Security Group as 'CR.User Access Grp' and the Reporting Groups as 'Active User Reporting Groups'. A table below shows no reporting group records are available. The status at the bottom is 'Active'.

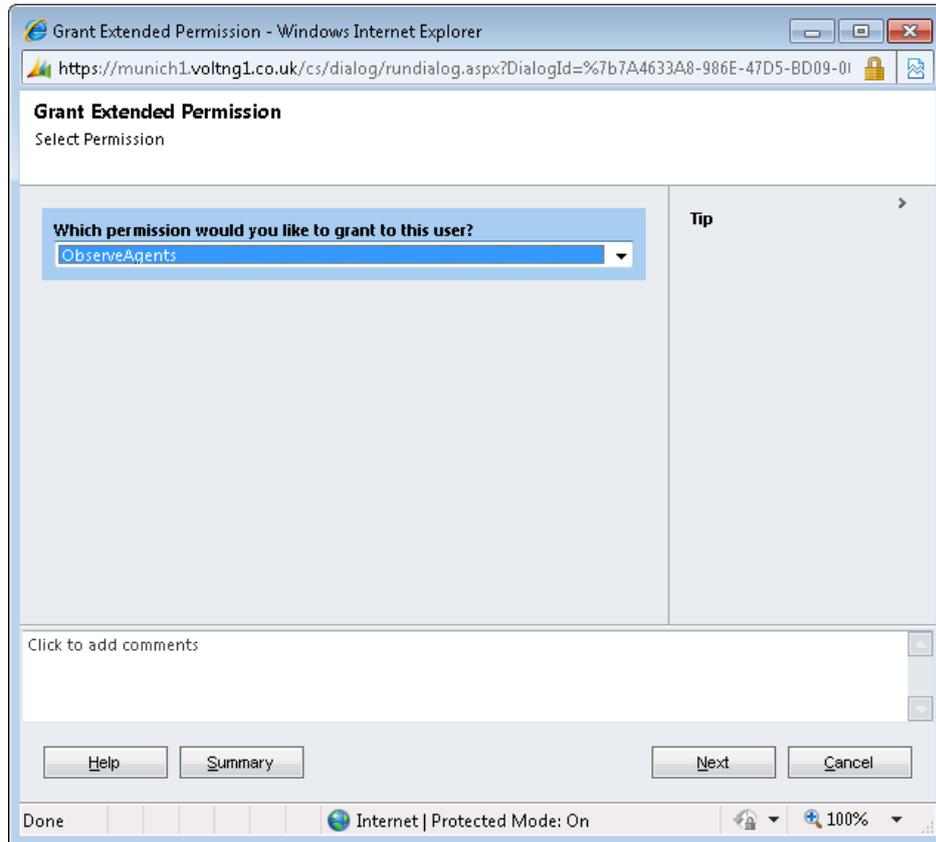
5 Click **Start Dialog** in the ribbon.

The Look Up Record dialog appears with the On Demand Dialog view of the Grant Extended Permission process:



- 6 Click **Grant Extended Permission** or click the corresponding selection box, then click **OK**.

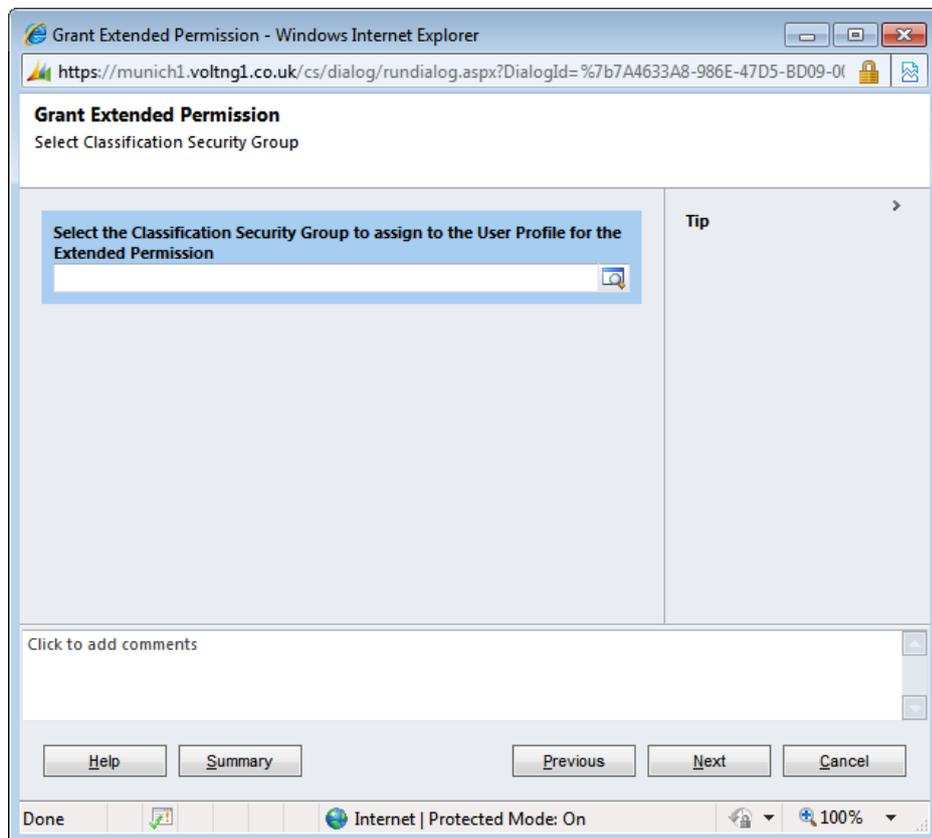
The Grant Extended Permission dialog appears.



- 7 Click the highlighted selection, then select **PlaybackClassificationRecordings** in the drop-down menu.

- 8 Add any desired comments in the lower portion of the dialog, then click **Next**.

The Grant Extended Permission/Select Classification Security Group dialog is displayed:



- 9 Click the button at the right end of the input field labelled Select the Classification Security Group

The Look Up Record dialog appears.



You might need to share a Classification with the user to make it available in the Look Up Record dialog.

- 10 In the Classification Security Group Lookup view, select the desired group, then click **OK**.
- 11 Add any desired comments, then click **Next**.
- 12 Click **Finish**.
You are returned to the User Profile dialog
- 13 Click **Start Dialog** again

The Look Up Record dialog appears with the On Demand Dialog view of the Grant Extended Permission process.

- 14 Select **Grant Extended Permission**, then click **OK**.

The Grant Extended Permission dialog is displayed.

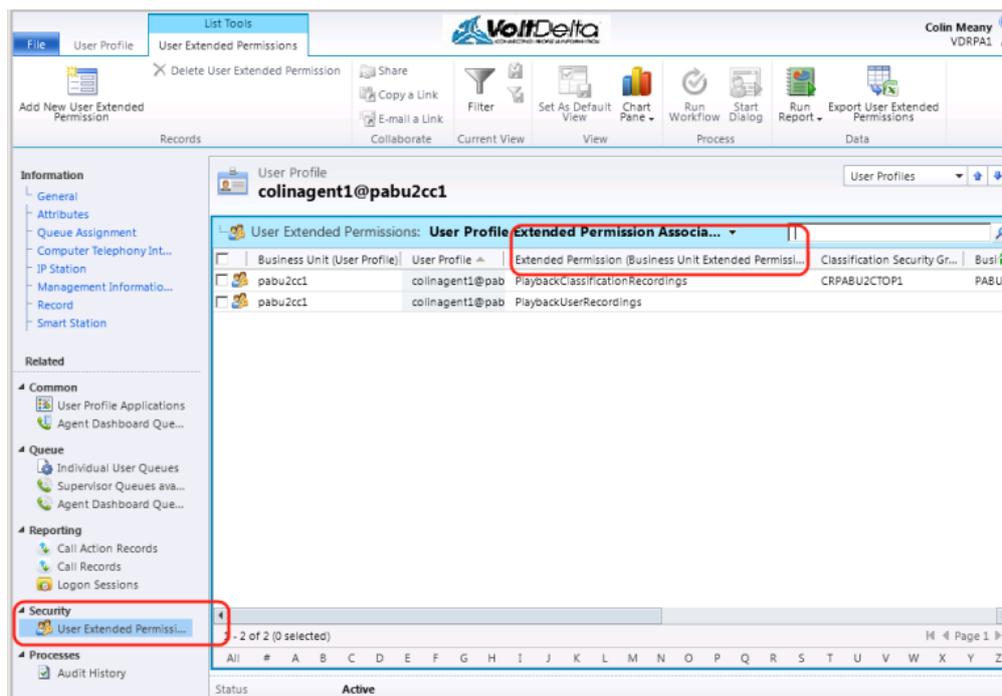
- 15 Select **PlaybackUserRecordings**, add any desired comments, then click **Next**.

- 16 In the User Security Group Lookup view, select the User Group to receive extended permissions, then click **OK**.

- 17 Add any desired comments, then click **Next**.

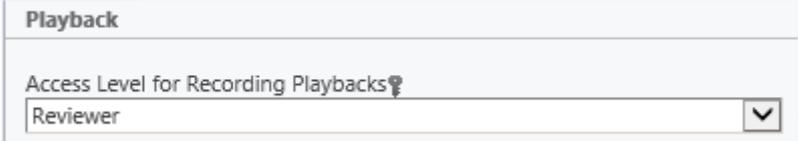
- 18 Click **Finish**.

- 19 Verify that the correct permissions have been granted by selecting **Security** → **User Extended Permissions** and then reviewing the permissions listed in the Extended Permissions column. (If required, you can also delete incorrect permissions from this view.)



- 20 Click on the **User Profile** tab to go back to the general settings for the user.

- 21 Navigate to the **Screen** → **Playback** section of the settings, and look for the **Access Level for Recording Playbacks** setting.



- 22** Change this setting for the desired access. The access types available are:

Value	Description
Reviewer	A Reviewer has the ability to review call recordings and mark and comment upon them. These users are provided with Call Mark and Comment input fields, along with Logon Id and Comment columns displayed in the list of available recording.
Standard	A Standard user does not have the ability to review call recordings and thus the input fields and additional display columns as described above for a Reviewer, are not available.

User Call Recording Playback is now enabled for the user.

11.3.2 Default User Time Zones

The default time zone allocated to a new user is copied from its “Created From” user’s time zone.

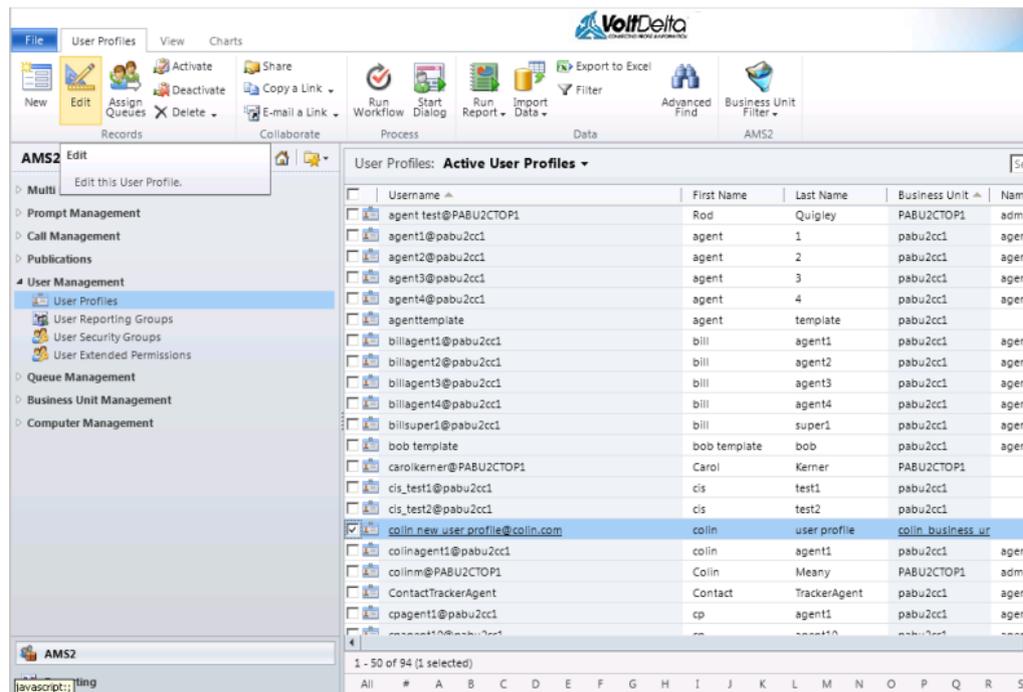
If the user created requires a different time zone, see the procedure in chapter 11.4.3 [Changing a Users Time Zone](#) below.

11.4 Editing a User

To edit a user profile, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management → User Profiles**.

The Active User Profiles view is displayed



- 2 From the displayed list of Users, select the User Profile you want to update.
- 3 Click **Edit** in the ribbon.

The User Profile Editing dialog is displayed. Any fields that are not allowed for editing by the User currently logged on appear dimmed (grayed)

- 4 Make the required changes for the user and then **Save** the User Profile. The Table in chapter 11.4.2, [User Profile Parameters](#), describes the parameters that appear on the User Profile dialog.

11.4.2 User Profile Parameters

The Table below describes the parameters for the User Profile dialog:

Field	Description
General	

Field	Description
Username	Name that uniquely identifies the user in the system.
Business Unit	Business Unit associated with user.
Password Never Expires?	Determines whether the user's password expires according to the system password policy or never expires.
Agent Role?	Determines whether the user is an agent who will handle calls.
First Name	The first name of the user.
Is Template?	Defines whether the record is a template. For templates, the system will only make the record available for creating new records. Templates are included in the Active User Profile view.
Account is Disabled?	Set to Yes to disable the user account and prevent further logons.
Last Name	The last name of the user.
User Role	Select one of the following roles to use to create the new user: <ul style="list-style-type: none"> • Reporting—Access limited to reporting functions • Manager—Access to all Management Portal administrative functions, including reporting
Create Status	The creation status for the user profile.
Password	The password for the user logon to the system.
Confirm password	Re-enter the password for the user logon to the system.
Time zone for Reporting	Time zone to be used for Reporting outputs.
General—Grouping	
User Security Group	The Security Group to which the user belongs.
Attributes	
User Tenant Hierarchy	The fully qualified tenant name hierarchy for the Tenant/Business Unit owning the user.

Field	Description
Tenant ID Hierarchy	The fully qualified Tenant ID Hierarchy for the Tenant\Business Unit owning the user.
Queue Assignment—Queue Assignment	
Queue Allocation Scheme	The scheme used to assign Queues to the user. For details, refer to chapter 6, Assigning Queues and Skill Sets .
Queue Assignment—Agent Queue	
Telephone Number	The telephone number for the agent Queue.
Priority	The priority used for calls placed in the Agent Queue. Enter a value between -99 and 99, with 99 being the highest priority.
E-mail Address	The e-mail address used for the Agent Queue.
Auto Accept?	Determines whether calls are automatically accepted. If Auto Accept is disabled, the agent must manually accept or decline calls.
Maximum Concurrent Calls	The maximum number of calls the agent can have at one time. No more than one call is allowed to be active, with other calls parked.
Accept Timeout	Time (in seconds) the call is presented to the agent before it is timed out. This value is relevant only if "Auto Accept?" is set to "No." The value must be less than the Classification setting, "Accept Timeout."
Default State After Call Handling	The default state the agent session enters when the agent finishes a call.
A-Party Display Restriction	Determines when, if ever, to display the A-Party number (CLI).
Computer Telephony Integration—Call Control	
Auto Accept?	Determines whether calls are automatically accepted. If Auto Accept is disabled, the agent must manually accept or decline calls.

Field	Description
Maximum Concurrent Calls	The maximum number of calls the agent can have at one time. No more than one call is allowed to be active, with other calls parked.
Accept Timeout	Time (in seconds) the call is presented to the agent before it is timed out. This value is relevant only if "Auto Accept?" is set to "No." The value must be less than the Classification setting, "Accept Timeout."
Default State After Call Handling	The default state the agent session enters when the agent finishes a call.
A-Party Display Restriction	Determines when, if ever, to display the A-Party's number (CLI).
Computer Telephony Integration— Consult and Transfer	
Enable Transfers?	Determines whether the agent is allowed to use the transfer functions while handling calls.
Auto Accept Consults?	Determines if consultation requests are automatically accepted. If set to No, the agent must manually accept or decline the consultations. The value is relevant only if "Auto Accept?" is set to "No."
Enable Consults?	Determines if the agent is allowed to use consult functions while handling calls.
Computer Telephony Integration— Outbound Calls	
Allow Outbound Calls?	Determines if the agent can generate outbound calls.
Outbound Call Service Provider	The Service Provider used for outbound calls.
Outbound Call Classification	The default Classification used when placing an outbound call operation
Computer Telephony Integration— Session Control	
Auto Ready?	Determines if the agent session is automatically set to Ready after finishing a call.

Field	Description
User Location	Select whether the agent will be logging in from a Remote location or from a Call Centre. This setting is valid only for ClickOnce and Terminal Server logon sessions (not valid for IP Station).

Computer Telephony Integration—Voice Device

Voice Device Identifier	<p>Identifies the Voice Device. This setting is used only when "User Location" is Remote. The following values can be used:</p> <ol style="list-style-type: none">1. A telephone number.2. A SIP address. This address must be contactable by the Sytem Host.3. The value auto. Specifies the system default SIP client is used.. The syntax of this value is: auto@sipaddress[:options] <p>Where:</p> <ul style="list-style-type: none">• sipaddress: This is the SIP address for the system and will be supplied by your System Host Administrators.• options: Various options separated by a dash character. Supported values are:<ul style="list-style-type: none">○ rport: Enables support for rport i.e. client can request from the server a response to the originating port.○ trace: Enables tracing from the system default SIP client. Should only be used when requested by System Host support engineers.○ Transport Types: Use one of the following. If none of these are specified, the system will default to using UDP transport:<ul style="list-style-type: none">▪ tcp: Enables support for TCP protocol.▪ tls: Enables support for TLS. Note: SRTP is supported if the SIP server requests it. <p>Examples:</p>
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Field	Description
	<p>a) auto@systemsipaddr : TLS disabled, rport disabled.</p> <p>b) auto@systemsipaddr:-tls : TLS enabled, rport disabled.</p>
	<p>c) auto@systemsipaddr:-tls-rport : TLS enabled, rport enabled.</p> <p>d) auto@systemsipaddr:-tcp : TCP enabled, rport disabled.</p> <p>4. The value novoice. This will mean the agent will have no voice capabilities, which may be useful if the agent is not handling voice calls.</p>
Allow Voice Device Identifier Entry?	Determines whether the agent is allowed to enter a Voice Device Identifier at logon. This setting is used only when "User Location" is "Remote"
Voice Device Identifier List	<p>Enter a list of Voice Devices (telephone numbers, or "auto" for built-in SIP clients), with optional names to display to the user.</p> <p>For example, the entries "auto@domain Built-In SIP, 510 Desk Phone" are displayed as "Built-In SIP" and "Desk Phone"</p>
Computer Telephony Integration—Tracing	
Tracing	Control tracing for Computer Telephony Integration components such as the SmartStation or Media Bar.
IP Station—Application Control	
Auto Focus Application on Call Arrival?	Determines if the application configured in the Classification setting, "Managed Application" receives focus on call arrival.
IP Station— Desktop	
Clear Desktop on Logon?	Determines whether the Windows desktop is cleared on Agent logon and application shortcuts are created for available Managed Applications. The setting applies to IP Station and Terminal Server installations only

Field	Description
Display Scheduled recording Icon in System Tray?	Determines whether to display the scheduled recording icon in the Windows system tray. The setting applies to IP Station and Terminal Server installations only.
Display Recording Icon in System Tray?	Determines whether to display the recording icon in the Windows system tray. The setting applies to IP Station and Terminal Server installations only.
IP Station—Application Control	
Allow User to Logon via Terminal Services?	Determines whether to allow the user to log on using the Terminal Services logon solution.
Drives to Share	Select the local computer drives, if any, to share with the Terminal Services session. the setting is valid only if "User Location" is "Remote". Note: Disable Protected Mode in IE9, and later, if sharing drives. This setting is located on the Security tab in Internet Options.
Run Terminal Services Session in Browser?	Determines whether to run the Terminal Services logon session in Internet Explorer.
Share Clipboard?	Determines whether the clipboard for Terminal Services logon session is shared with the local (client) computer. This setting is used only when "User Location" is "Remote."
VPN Phonebook Entry	Name of VPN phone book entry used for Terminal Services logon session. This setting is used only when "User Location" is "Remote."
Screen Size	Size in pixels of the User's local (client) computer screen. This setting is used only when "User Location" is "Remote."
Start Full Screen?	Determines if the Terminal Services logon session starts in full screen. This setting is used only when "User Location" is "Remote."

Field	Description
Color Depth	The color depth (bits-per-pixel) to use for the Terminal Services logon session. This setting is used only when "User Location" is "Remote."
IP Station— Voice Settings	
Gender	The User's gender. The system uses this information to determine the type of generic salutation to play on call arrival at the user position.
Speaker Gain	Gain for the headset speaker. Valid for IP Station installations using a supported integrated headset.
Microphone Gain	Gain for the microphone. Valid for IP Station installations using a supported integrated headset.
Call Arrival Tone Gain	Gain for the tone played on call arrival. Valid for IP Station installations using a supported integrated headset.
Side Tone Gain	Gain for the sound level fed back from the microphone to the speaker. Valid for IP Station installations using a supported integrated headset.
Salutation Playback Gain	Gain applied to salutations during playback. Valid for IP Station installations using a supported integrated headset.
Salutation Recording Gain	Gain used when recording salutations. Valid for IP Station installations using a supported integrated headset.
Record—General	
Record User?	Determines whether this user can be recorded while handling calls.
Allow Control of Call Recordings?	Determines whether this user is allowed to stop and start call recordings for a call.
Record— Playback	

Field	Description
Access Level for Recording Playbacks	Set the access level that the recording system provides to the user. Following are the values: <ul style="list-style-type: none"> Reviewer Standard See Chapter 11.3.1.3, Granting User Access to the Call Recording Playback for details on these access levels.
Export Permission	Defines the type of audio and video exporting the user is allowed to perform.
Record— Screen Recording	
Screen Recording Mode	The screen recording mode for the user. This setting is used only when the "User Location" is "Remote."
Workstation —CRM	
Display CRM Tab?	Defines whether to enable the CRM tab on the Workstation.
CRM Password	The password for logging on to Microsoft Dynamics CMR. This value is needed only for connecting to a customer on-site CRM system, otherwise leave blank.
CRM Username	The user name for logging on to Microsoft Dynamics CMR. This value is needed only for connecting to a customer on-site CRM system, otherwise leave blank.
CRM Domain Name	The name of the domain used to authenticate Microsoft Dynamics CMR logons. This value is needed only for connecting to a customer on-site CRM system, otherwise leave blank.
Workstation—Display	
Display Mode	Sets the display mode for workstation as Ribbon or Normal (full screen).
SmartStation— Session Control	
Override Auto Ready?	Determines whether the user can change the setting "Auto Ready" during their logon session. If the override is enabled, any changes made by the user are not persistent and apply only to their current logon session.

Field	Description
Override Auto Accept?	Determines whether the user can change the setting "Auto Accept" during their logon session. If the override is enabled, any changes made by the user are not persistent and apply only to their current logon session.
SmartStation—Web Chat	
Web Chat Nickname	Nickname to use for Web Chat Services.

11.4.3 Changing a Users Time Zone

Management Portal date and time values are consist with the time zone setting defined for a user¹.

Changing the time zone associated with a user requires the following steps:

- 1 Login as a Management Portal Manager and open the user profile for Edit (see chapter 11.4, [Editing a User](#)).
- 2 In the General section, change “Time zone for Reporting” to the required time zone and save the record.

The screenshot shows a user profile edit form. The 'Time zone for Reporting' dropdown menu is highlighted with a red box and set to '(GMT-07:00) Mountain Time (US & Canada)'. Other visible fields include 'Created From' (Default), 'Agent Role?' (No selected), 'First Name' (TenantAdmin), and 'Time zone to be used for'.

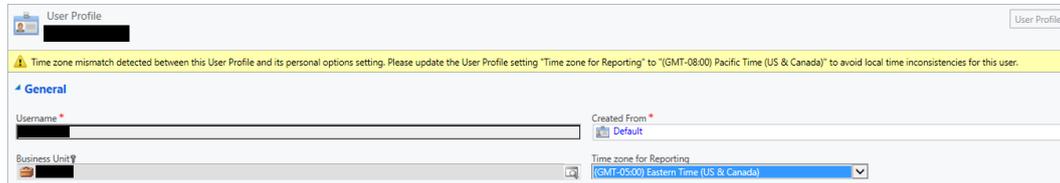


System will display a warning message when the time zones between a User Profile and its corresponding Personal Options Settings do not match. To resolve

¹ The Start Time Hour / Minute and End Time Hour / Minute fields in Call Records and Call Action Records are an exception to this, in that these values are computed based on the Business Unit setting “Time Zone”, not the User Profile “Time zone for Reporting” setting.

the warning, simply change the time zone on User Profile form by following above steps 1-2 as instructed in the warning message.

e.g. Warning message:



11.5 Deleting a User



Use caution when deleting a user, as the deletion process cannot be undone.

Be aware that you can also deactivate a user, as described in Chapter 11.6, [Deactivating a User](#). If you deactivate a User, you can reactivate the User at a later time, if necessary.

To delete a user profile, proceed as follows:

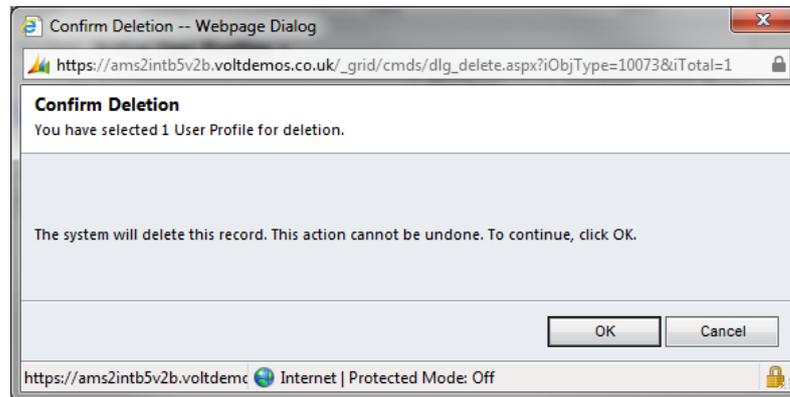
- 1 In the Management Portal navigation pane, select **User Management** → **User Profiles**.

The Active User Profiles view is displayed

Username	First Name	Last Name	Business Unit	Name (User Security Group)
agent.test@PABU2CTOP1	Rod	Quigley	PABU2CTOP1	admin
agent1@pabu2cc1	agent	1	pabu2cc1	agents
agent2@pabu2cc1	agent	2	pabu2cc1	agents
agent3@pabu2cc1	agent	3	pabu2cc1	agents
agent4@pabu2cc1	agent	4	pabu2cc1	agents
agenttemplate	agent	template	pabu2cc1	
billagent1@pabu2cc1	bill	agent1	pabu2cc1	agents
billagent2@pabu2cc1	bill	agent2	pabu2cc1	agents
billagent3@pabu2cc1	bill	agent3	pabu2cc1	agents
billagent4@pabu2cc1	bill	agent4	pabu2cc1	agents
billsuper1@pabu2cc1	bill	super1	pabu2cc1	agents
bob template	bob template	bob	pabu2cc1	agents
carolkerner@PABU2CTOP1	Carol	Kerner	PABU2CTOP1	
cis_test1@pabu2cc1	cis	test1	pabu2cc1	
cis_test2@pabu2cc1	cis	test2	pabu2cc1	
colin.new.user.profile@colin.com	colin	user profile	colin.business.ut	
colinagent1@pabu2cc1	colin	agent1	pabu2cc1	agents
colinm@PABU2CTOP1	Colin	Meany	PABU2CTOP1	admin
ContactTrackerAgent	Contact	TrackerAgent	pabu2cc1	agents
cpagent1@pabu2cc1	cp	agent1	pabu2cc1	agents
cpagent2@pabu2cc1	cp	agent2	pabu2cc1	agents

- 2 From the list of users, select the user profile you wish to delete.
- 3 Click **Delete** in the ribbon.

The following confirmation dialog is displayed.



- 4 Click **OK** to confirm the deletion of the user profile.

11.6 Deactivating a User

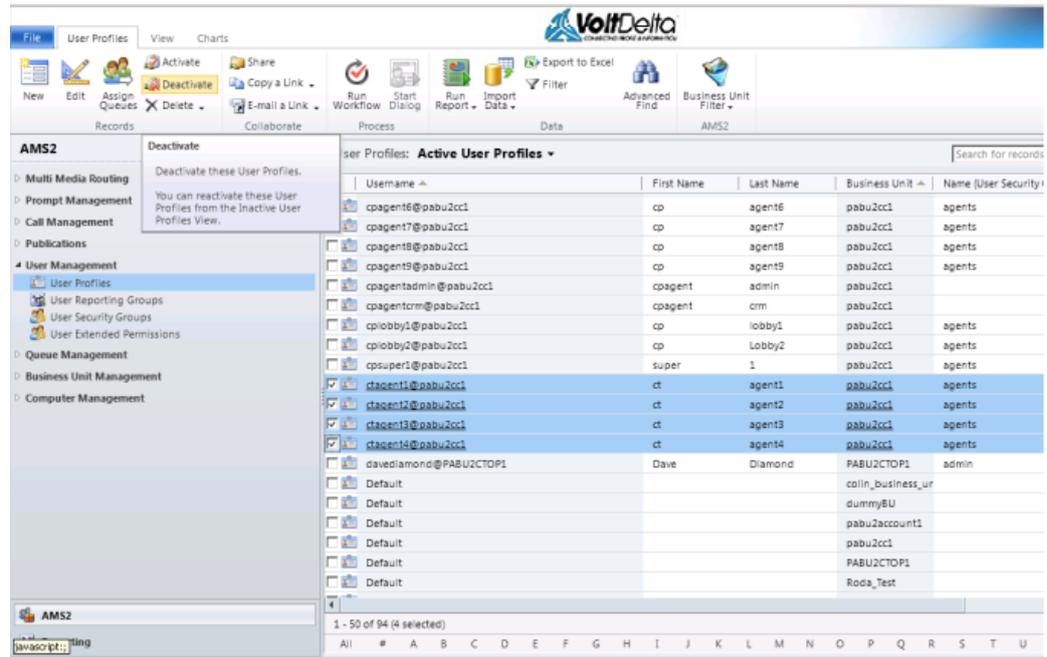
Deactivating a user profile puts it in an inactive state and the user profile can only be viewed from the Inactive User profile view.

To deactivate a user profile, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management → User Profiles**.

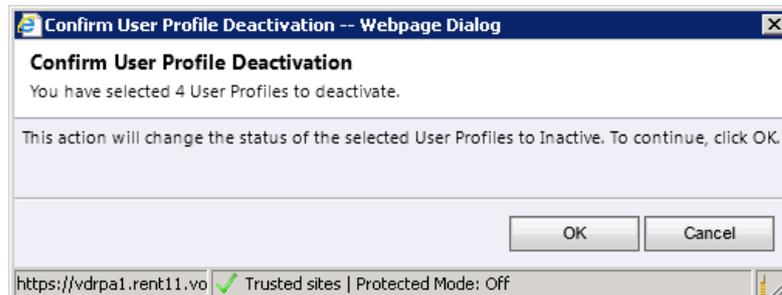
The Active User Profiles view is displayed.

2 Select the user profile(s) you want to deactivate.



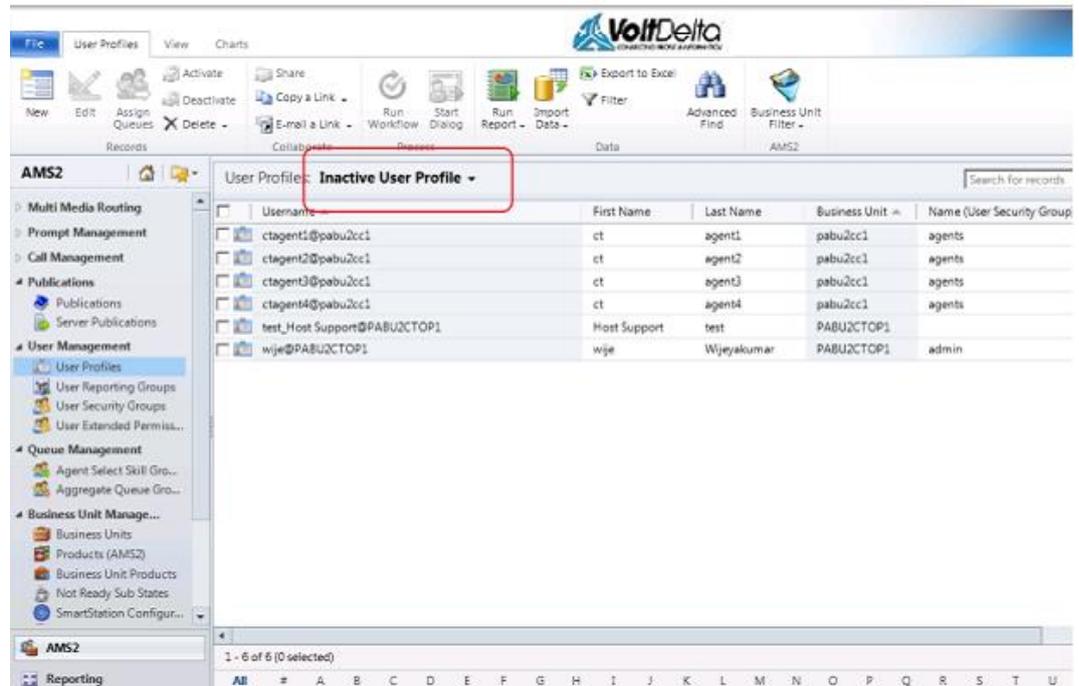
3 Click Deactivate in the ribbon.

The following confirmation dialog is displayed.



- 4 Click **OK** to confirm the deactivation of the user profile(s).

The deactivated Users are visible in the Inactive User Profile view:



11.7 Activating a User

Activating a user moves a deactivated user from the Inactive User Profile view to the Active User Profile view

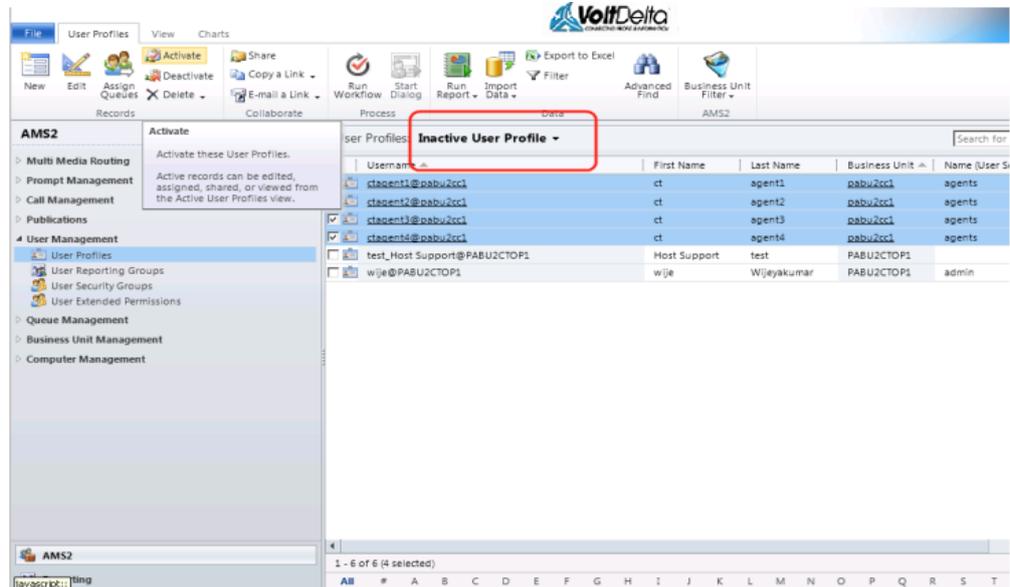
An activated user can resume normal functions on the Management Portal.

To activate a user profile, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management** → **User Profiles**..

2 Change the User Profile view to **Inactive User Profile**.

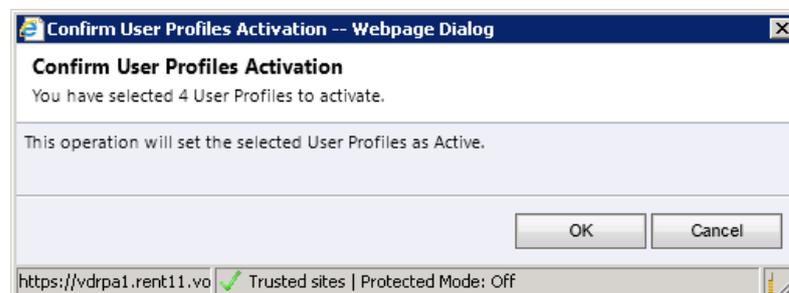
The Inactive User Profiles view is displayed



3 Select the user profile(s) you want to activate.

4 Click **Activate** in the ribbon.

The following confirmation dialog is displayed.



5 Click **OK** to confirm the activation of the user profile(s).

6 Change the User Profile view back to **Active User Profiles** and ensure you can see your recently activated user profile(s).

11.8 Configuring an External Account User

11.8.1 Sharing data

11.8.1.1 Sharing the User Profile data

For reporting purposes an External Account user will need to see the agents that are handling their calls.

- 1 Create a user security group for the team of agents that are handling the calls and add the agent's user profile records to the new group. See chapter 12.2, [Creating a User Security Group](#). User profile records can only belong to one security group, and as such there may already be a security group for the agents.
- 2 Share (Read access) the user security group to the business unit's team, not the external account user. Sharing to the team means that this group will be shared to all users in the business unit and the step will not need to be done again for other users in that business unit. See chapter 4.3, [Sharing an Entity](#). Sharing the user security group will also share the user profile records within the group. Any subsequent user profile records added to the security group will inherit the groups shared.
- 3 Create a user reporting group for the user profile records of the agents handling the calls and add the user profile records to the new group. See chapter 5.2, [User Reporting Groups](#).
- 4 Share (Read access) the user reporting group to the business unit's team. See chapter 4.3, [Sharing an Entity](#).

Assuming the agents in this group are the same users in the user security group create in the previous chapter then there is no need to share the user profile records.

11.8.1.2 Sharing Queue Data

For reporting purposes an External Account user will need to see the queues that are handling their calls.

- 1 Create a queue reporting group for the queue that are required and add the queues to the new group. See chapter 5.3, [Queue Reporting Groups](#).
- 2 Share (Read access) the new queue reporting group to the business unit's team. See chapter 4.3, [Sharing an Entity](#).
- 3 If the user will only be using groups for reporting, then share one queue that belongs to the group (if this is not done, the groups will not be seen by the user). See chapter 4.3, [Sharing an Entity](#). If the user will be reporting on groups and/or queues, then share (Read access) all the queues in the group.

11.8.1.3 Sharing Classification Data

For reporting purposes an External Account user will need to see the classifications that are handling their calls.

- 1 Create a classification reporting group for the classifications that are required and add the queues to the new group. See chapter 5.4, [Classification Reporting Groups](#).
- 2 Share (Read access) the new classification reporting group to the business unit's team. See chapter 4.3, [Sharing an Entity](#).
- 3 If the user will only be using groups for reporting, then share one classification that belongs to the group (if this is not done, the groups will not be seen by the user). See chapter 4.3, [Sharing an Entity](#). If the user will be reporting on groups and/or classifications, then share (Read access) all the classifications in the group.

11.8.2 Dashboards & Dynamic Reports

The External Account user will have access to the Management Dashboard and/or Dynamic Reports. By default there will be no data displayed as the External Account user will need to be given access to the reporting groups that are relevant to their team.

- 1 See chapter 11.8.1.2, [Sharing Queue Data](#).
- 2 See chapter 11.8.1.1, [Sharing the User Profile data](#).

11.8.3 MIS Reports

An External Account user will have access to create reports or to run reports that are shared with them. By default External Account user will not have any of the built in reports shared with them, so initially will not see any reports.

Additionally the data for the parameters in these reports will have to be shared with these users. The data required will depend upon the report(s) the user is able to access, and which parameters are on the report(s). This could include service provider(s), client computer(s), client computer reporting group(s), queue(s), queue reporting group(s), classification(s) and classification reporting group(s).

- 1 Reports are shared using the same method as entities, see chapter 4.3, [Sharing an Entity](#).
- 2 Service provider(s), client computer(s), client computer reporting group(s), queue(s), queue reporting group(s), classification(s) and classification reporting group(s) should be shared with the team leader as per chapter 11.8.1.2, [Sharing Queue Data](#), chapter 11.8.1.1, [Sharing the User Profile data](#), chapter 11.8.1.3, [Sharing Classification Data](#) and chapter 4.3, [Sharing an Entity](#).

11.8.4 Call Recordings

Extended permissions are required for viewing call recordings, and should be configured for an External Account User for classification(s), users(s) or both classification(s) & user(s).

- 1 Create a classification security group for the classifications that are required and add the queues to the new group. See chapter 12.3, [Classification Security Groups](#). The classification security groups can then all be added as child groups to the parent group. The parent group can then be used to create the extended permission.
- 2 Add a *PlaybackClassificationRecordings* extended permission for the external account user using the new classification security group. See chapter 11.3.1.3, [Granting User Access to the Call Recording Playback](#).
- 3 Add a *PlaybackUserRecordings* extended permission for the external account user using the user security group that is required for this user. See chapter 11.3.1.3, [Granting User Access to the Call Recording Playback](#).

11.9 Configuring a Team Leader User

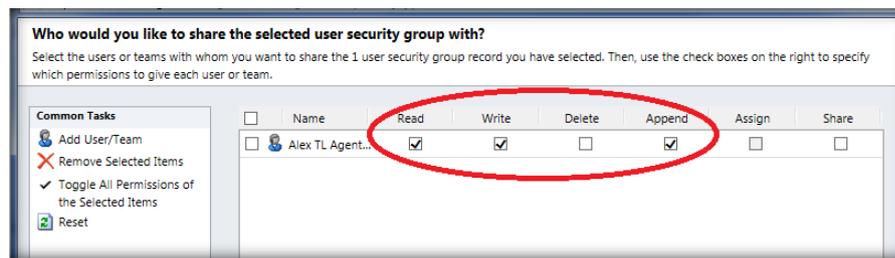
When a Team Leader is initially created, they can see very little data in the system. Therefore a Team Leader needs to be configured to have the appropriate data shared with them for their needs, as detailed in the following sub-chapters.

11.9.1 User Profiles for Team Members

So Team Leaders can manage their team of agents, the agents User Profiles need to be shared with them.

- 1 Create a user security group for the team and add the team members to the new group. See chapter 12.2, [Creating a User Security Group](#).
- 2 Share the user security group to the Team Leader. See chapter 4.3, [Sharing an Entity](#). Sharing the user security group will also share the user profile records in the group. Any subsequent user profile records added to the group will inherit the security groups sharing.

If a Team Leader has been given the additional capabilities via the management roles Tenant Agent Queue Manager and/or Tenant Media Quota Manager, the Team Leader must be provided with Write and Append share access to their team members, along with the Read access required by default for all Team Leaders.



11.9.2 Dashboards & Dynamic Reports

The Team Leader will have access to the Management Dashboard and/or Dynamic Reports. By default there will be no data displayed as the Team Leader will need to be given access to the reporting groups that are relevant to their team.

- 1 Create a queue reporting group for the team and add the queues to the new group. See chapter 5.3, [Queue Reporting Groups](#).
- 2 Share the queue reporting group to the team leader, with read and append access. See chapter 4.3, [Sharing an Entity](#).
- 3 Create a user reporting group for the team and add the team members to the new group. See chapter 5.2, [User Reporting Groups](#).
- 4 Share the user reporting group to the team leader, with read and append access. See chapter 4.3, [Sharing an Entity](#).

11.9.3 MIS Reports

A Team Leader will have access to create reports or to run reports that are shared with them. By default a Team Leader will not have any of the built in reports shared with them, so initially will not see any reports.

Additionally the data for the parameters in these reports will have to be shared with these users. The data required will depend upon the report(s) the user is able to access, and which parameters are on the report(s). This could include service provider(s), client computer(s), client computer reporting group(s), queue(s), queue reporting group(s), classification(s) and classification reporting group(s).

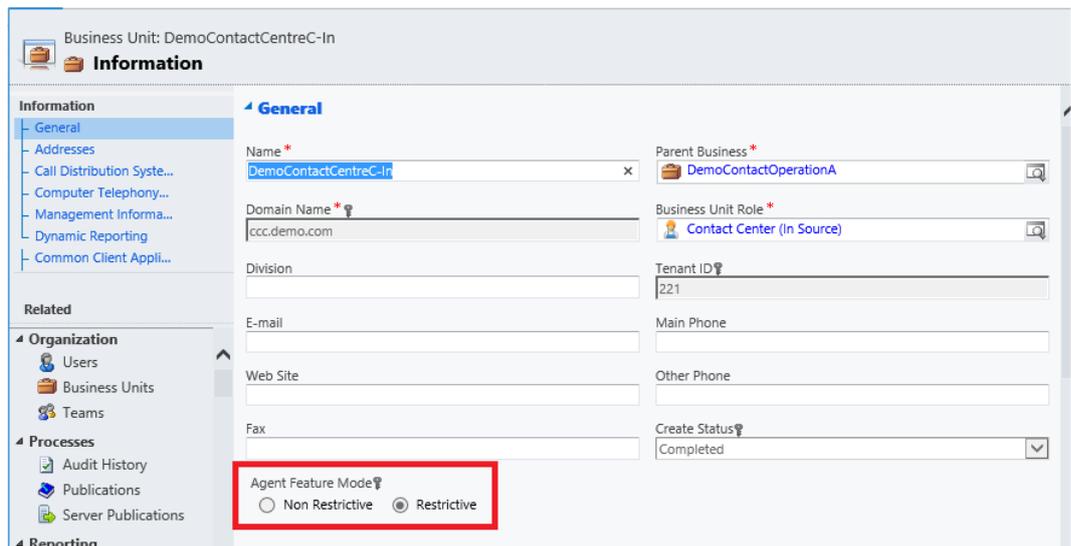
- 1 Reports are shared using the same method as entities, see chapter 4.3, [Sharing an Entity](#).
- 2 Service provider(s), client computer(s), client computer reporting group(s), queue(s), queue reporting group(s), classification(s) and classification reporting group(s) should be shared with the team leader as per chapter 4.3, [Sharing an Entity](#).

11.10 Agent Features

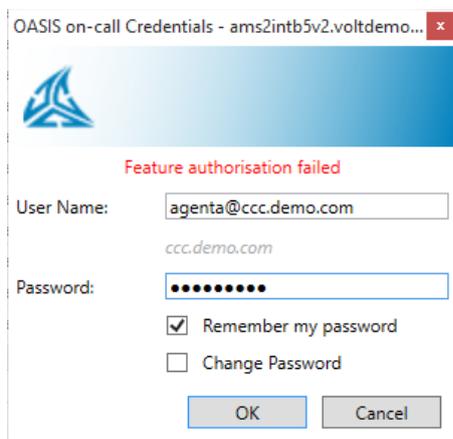
11.10.1 Overview

Agent Features are Products that can be used to control which features an agent is allowed to use. Agent Features are applications such as SmartStation or Media Bar, and their sub-features such as Agent Dashboard.

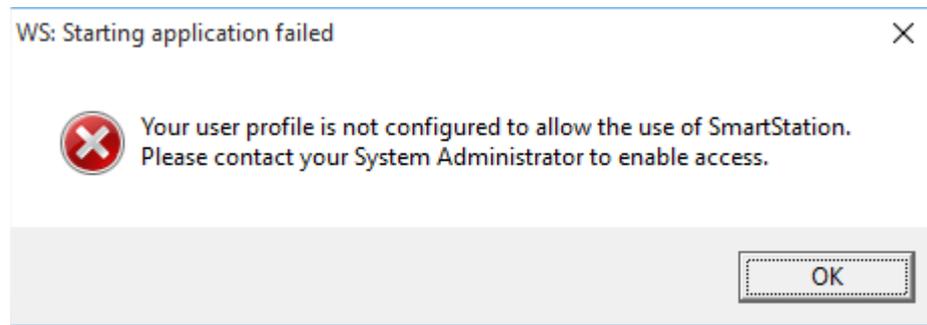
The Agent Features functionality is enabled for a Business Unit by setting the *Agent Feature Mode* to **Restricted**. This setting is configured by System Host Administrators once it is deemed the functionality should be enabled for a Business Unit.



When this mode is configured agents will be prevented from logging on or accessing some of the applications features (Agent Dashboard, RightNow CRM, etc), unless the required Agent Features are enabled and allocated to their User Profile. If this happens the agent will be shown this for Media Bar:



And this for SmartStation:



Client applications (SmartStation, Media Bar) will deny access to the client application after logon processing if the following conditions are met:

- 1 The Business Unit setting Agent Feature Mode is set to **Restrictive**.
- 2 The Client Application Business Unit Product (Agent Feature) is not assigned to the agents Business Unit, or is assigned and in the disabled state. See Chapter 11.10.2, Business Unit Products (Agent Features).
- 3 The Client Application Business Unit Product (Agent Feature) is not assigned to the agent User Profile, or is assigned and in the disabled state. See Chapter 11.10.3. Configuring Agent User Profiles.

Additionally, each Client Application has a number of related features which must also be configured for the agent User Profile if the features are to be active in the Client Application. These related features are controlled by the following Business Unit Products (Parent Product -> Name):

- 4 Media Bar -> Agent Dashboard (Media Bar)
- 5 Media Bar -> RightNow CRM Connector (Media Bar)
- 6 Media Bar -> Salesforce.com Connector (Media Bar)
- 7 SmartStation -> Agent Dashboard
- 8 SmartStation -> Dynamics Connector
- 9 SmartStation -> salesforce.com Connector

When Agent Features are assigned to agent User Profiles, the system will record which Agent Features are used by the agent for each Logon Session. This information is recorded in Agent Logon Session Agent Features (See Chapter 11.10.4, Logon Session Agent Features).

11.10.2 Business Unit Products (Agent Features)

To add Business Unit Products see Chapter 2.3.1, Adding a Product to a Business Unit. One or more of the following (Agent Feature) Business Unit Products should be assigned to each Business Unit that has the Agent Feature Mode set to Restricted, and the Business Unit Product must also be shared and enabled (See chapters 2.3.2, Sharing a Product and chapter 2.3.3, Enabling Business Unit Products):

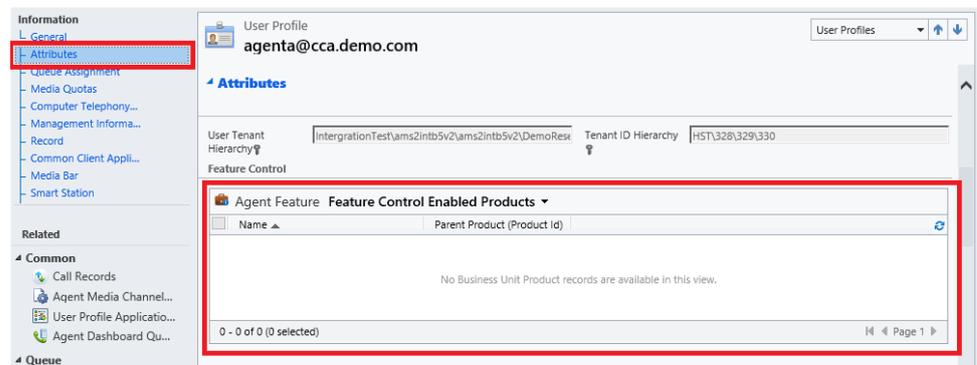
- 1 Media Bar
- 2 Media Bar -> Agent Dashboard (Media Bar)
- 3 Media Bar -> RightNow CRM Connector (Media Bar)
- 4 Media Bar -> Salesforce.com Connector (Media Bar)
- 5 SmartStation
- 6 SmartStation -> Agent Dashboard
- 7 SmartStation -> Dynamics Connector
- 8 SmartStation -> salesforce.com Connector

11.10.3 Configuring Agent User Profiles

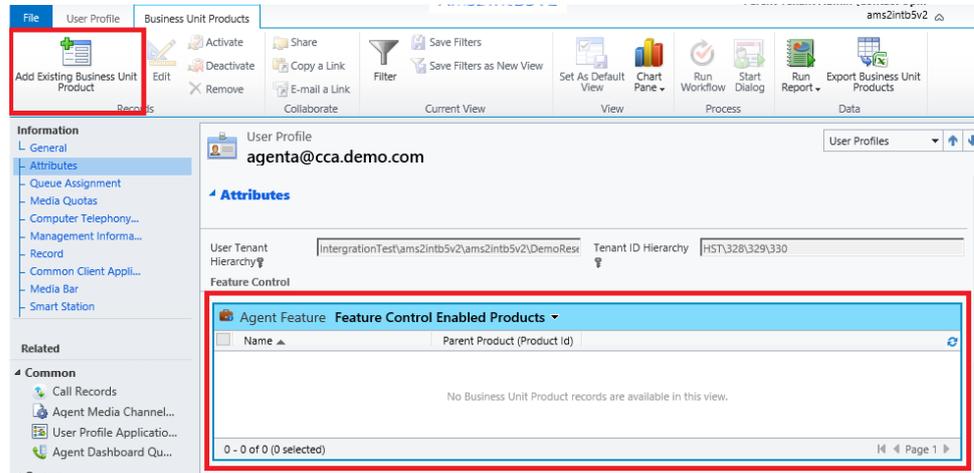
Once Business Unit Products (Agent Features) have been assigned to the Business Unit where agent User Profiles reside, assign the required Agent Features to agent User Profiles by either configuring via each User Profile or via the Business Unit Products (Agent Features) as follows:

Via User Profile:

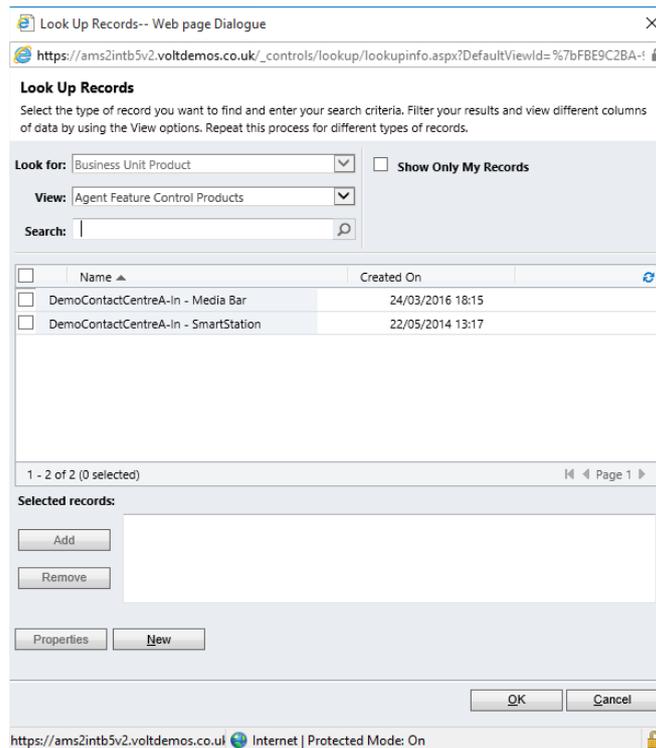
- 1 Find and open the agent User Profile to display the User Profile form, and select the **Attributes** section to get to the **Agent Feature** configuration area.



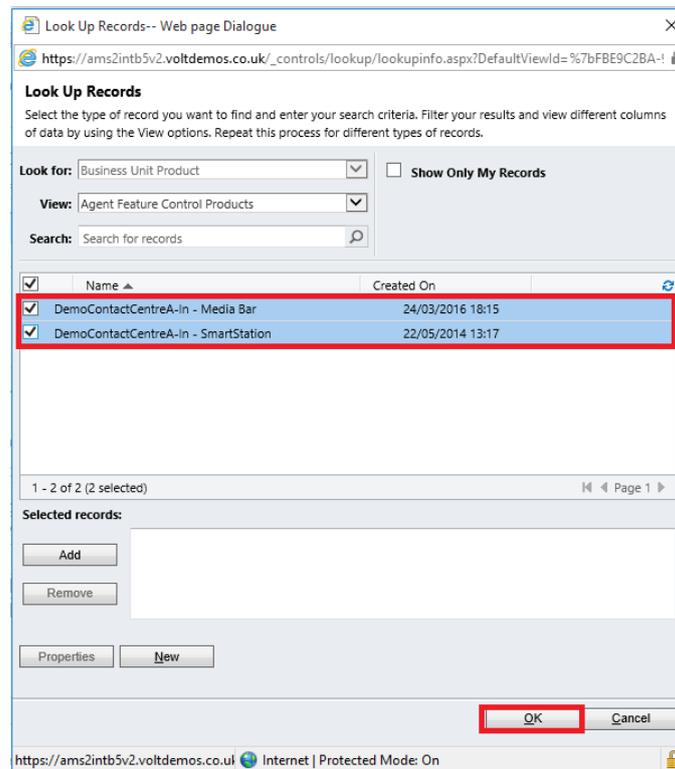
- Click in the Agent Feature area, and then click on then **Add Existing Business Unit Products** button.



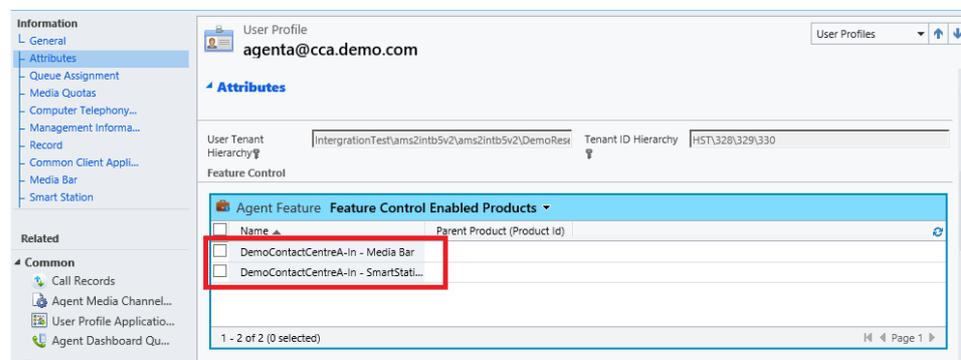
- The list of available Agent Features will be displayed.



- Select the Agent Feature(s) you wish to assign to the agent and click OK.

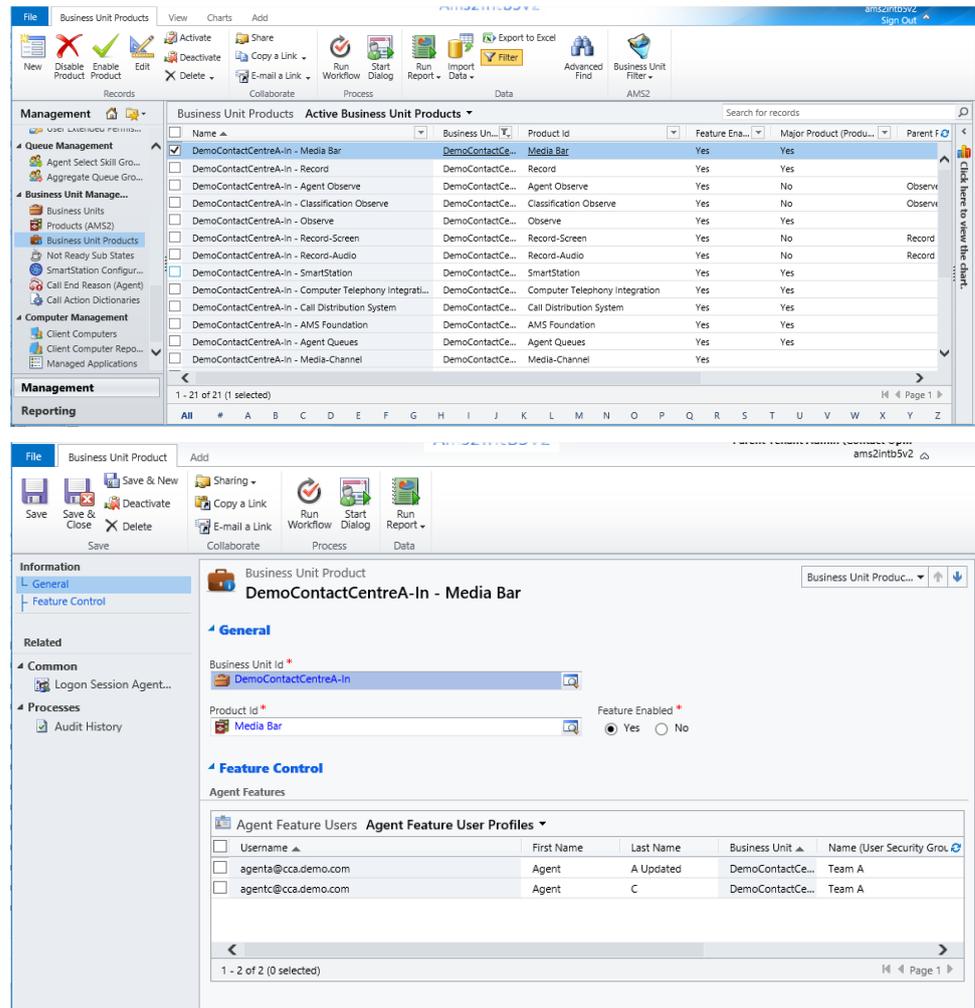


- 5 The Agent Features will then have been assigned to the agents User Profile.

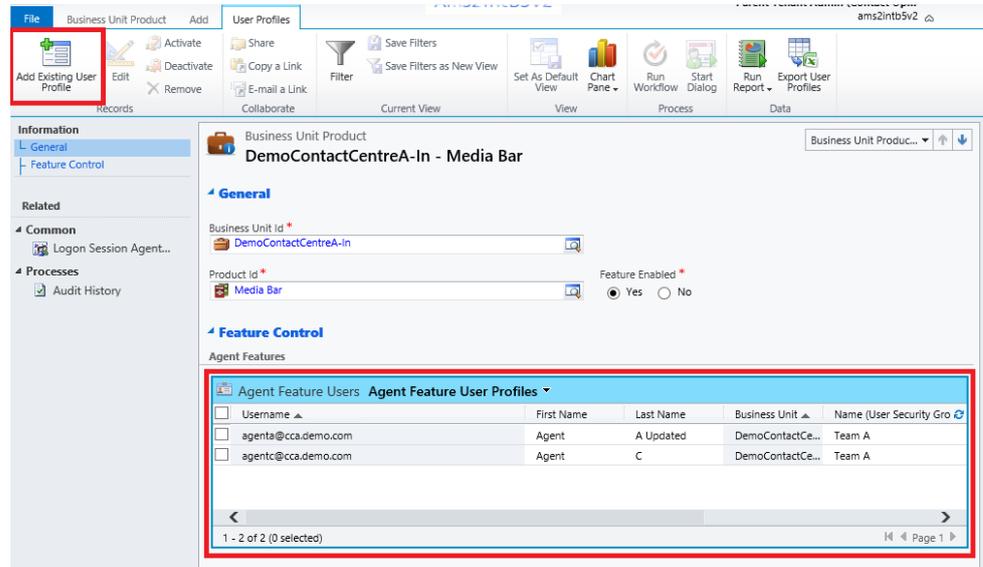


Via Business Unit Products (Agent Feature):

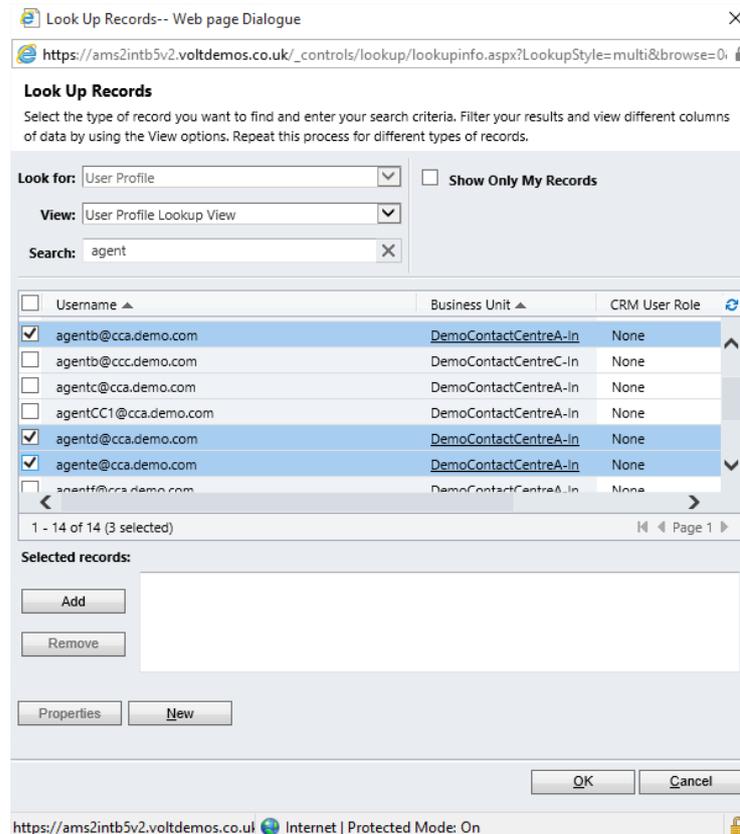
- 6 Find and open the required Business Unit Feature (Agent Feature). For example, the following shows the Business Unit Product **Media Bar** selected. Click on the **Edit** button to open it.



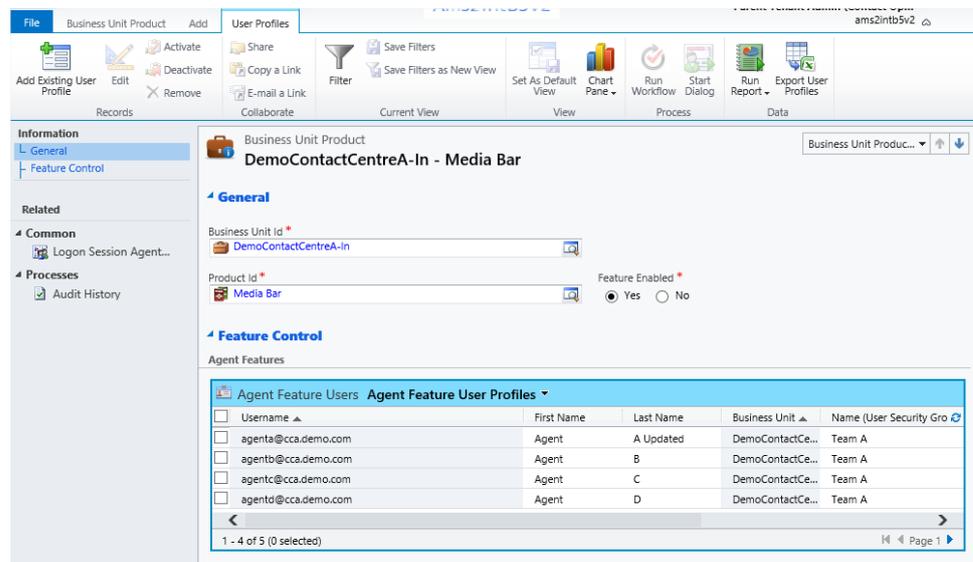
7 Click on the **Agent Feature Users** area, and then click on the **Add Existing User Profile** button.



- 8 In the Look Up Records dialog display, find and select the required agent User Profiles ensuring you only select User Profiles that belong to the same Business Unit as the Agent Feature. Click on OK once you've selected the User Profiles.



- 9 The agent User Profiles will now have been assigned to the Agent Feature.

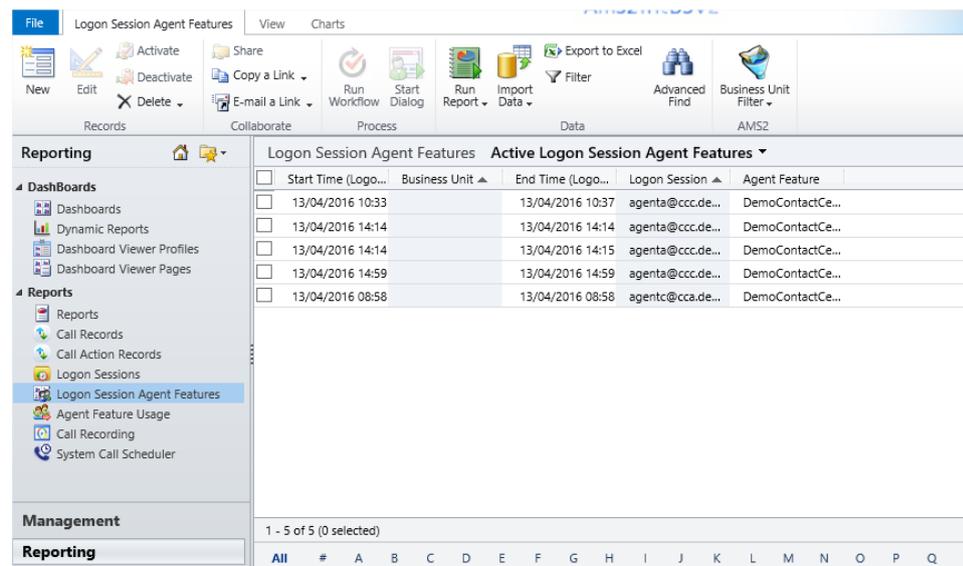


11.10.4 Logon Session Agent Features

When Agent Features are assigned to agent User Profiles, the system will record these against each Logon Session for the agent.

If an agent is configured with multiple Client Applications (SmartStation, Media Bar) then the Agent Feature for the Client Application used for the Logon Session will be recorded.

The Logon Session Agent Features are found in **Reporting -> Logon Agent Session Features**.



Alternatively, you can open up a Logon Session and then view the Agent Features assigned to that Logon Session from there:

12 Security Groups

12.1 Overview

This chapter provides information on the following topics:

- User Security Groups
- Classification Security Groups
- Queue Security Groups

12.2 User Security Groups

User Security Groups are used to aggregate Users into groups so that Administrators can be given permission to view or administer them.

These groups can be hierarchical and are typically used to set up the Users within systems to mirror the structure of the users within the organization.

User Security Groups are required for the following functions:

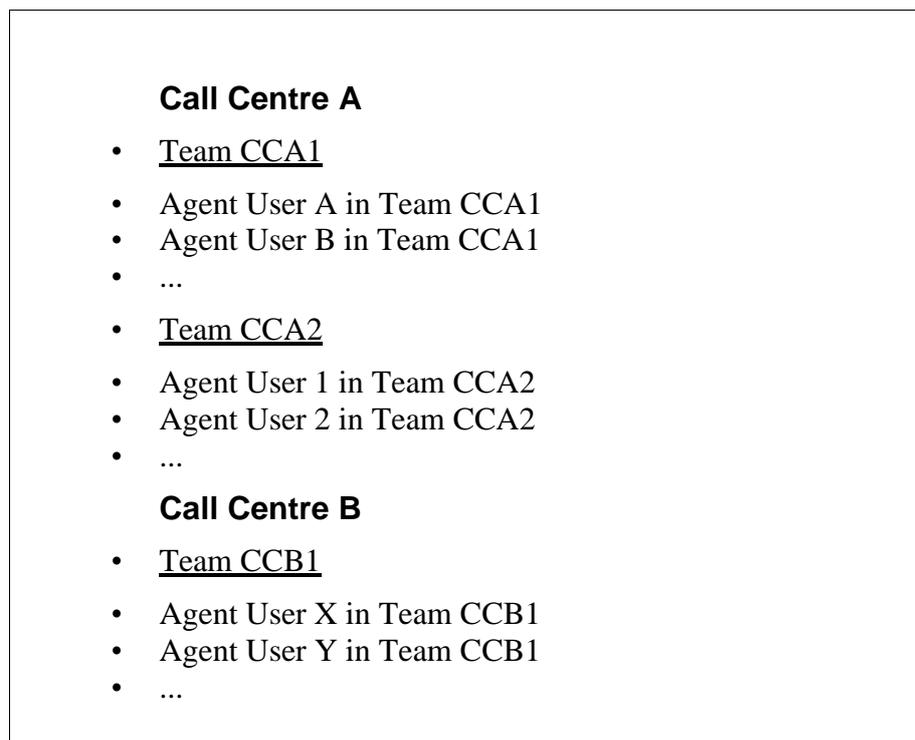
- To enable administrator users to play back call recordings. (Refer to chapter 11.3.1.3, Granting User Access to the Call Recording Playback for details about the feature.)
- To determine which Users will have the Observe User feature at their disposal, and which Agent Users they are allowed to observe. (Refer to chapter 11.3.1.2, Granting User Access to the Observe Functions for details about the Observe feature.)

Additionally, these groups can be shared on the Management Portal, allowing Users to be given access to the groups and members of the groups. For example, a parent Business Unit might share such a group with one or more of its child Business Units. The children can then access the Agent Users as required. For details about sharing, refer to chapter 4, Sharing Entities.

For example, you could define a top level of User Security Groups that represent the Call Centres or Departments in your organization. Within those groups you could then establish other groups that constitute the different teams of individual Agents.

For example, you could define a top level of User Security Groups for the Company Sporting Goods R US, which has two Call Centres in different countries. Within those centres you could then establish Agents who work on Teams A, B, C, and D. Using Sharing you could allow either of the Call Centres to access the Teams they are in charge of.

The Figure below shows an example User Security Group hierarchy with the User Security Groups “Call Centre A” and “Call Centre B” at the top of the hierarchy. Each Call Centre contains multiple underlying “Team” User Security Groups, which in turn contain the Users.



A User can exist in only one User Security Group. User Security Groups can contain other User Groups (self-referencing) to form an unlimited hierarchy of Users.



All groups and members of groups must belong to the same Business Unit.

The administration of User Security Groups includes the following tasks:

- Creating a User Security Group
- Assigning a User to a User Security Group

12.2.1 Creating a User Security Group

To create a User Security Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management** → **User Security Groups**.
- 2 Click **tNew** in the ribbon.
The New User Security Group dialog is displayed.
- 3 In the Name field, enter a name for the new group. When specifying a name, do not enter the apostrophe character (').
- 4 In the Business Unit field, select the Business Unit for which the User Security Group is being created.
- 5 Click **Save** to create the group.



This does not close the form, so that you can subsequently assign groups and users to it.

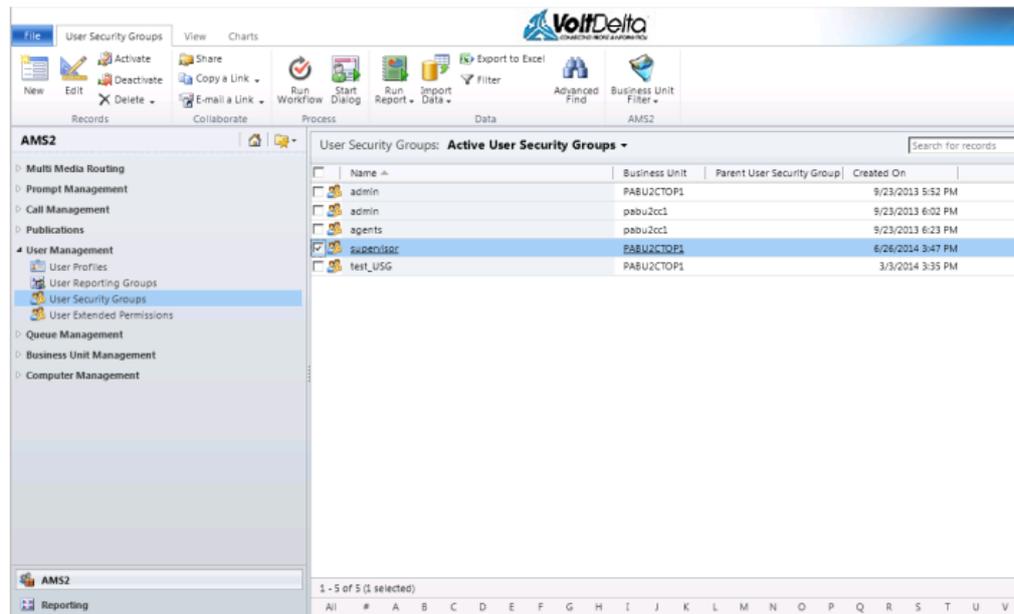
- 6 Continue by assigning Users to the new User Security Group

12.2.2 Assigning a User to a User Security Group

To assign a User to a User Security Group,, proceed as follows:

- 1 In the Management Portal navigation pane, select **User Management → User Security Groups**.

The list of Active User Security Groups is displayed:



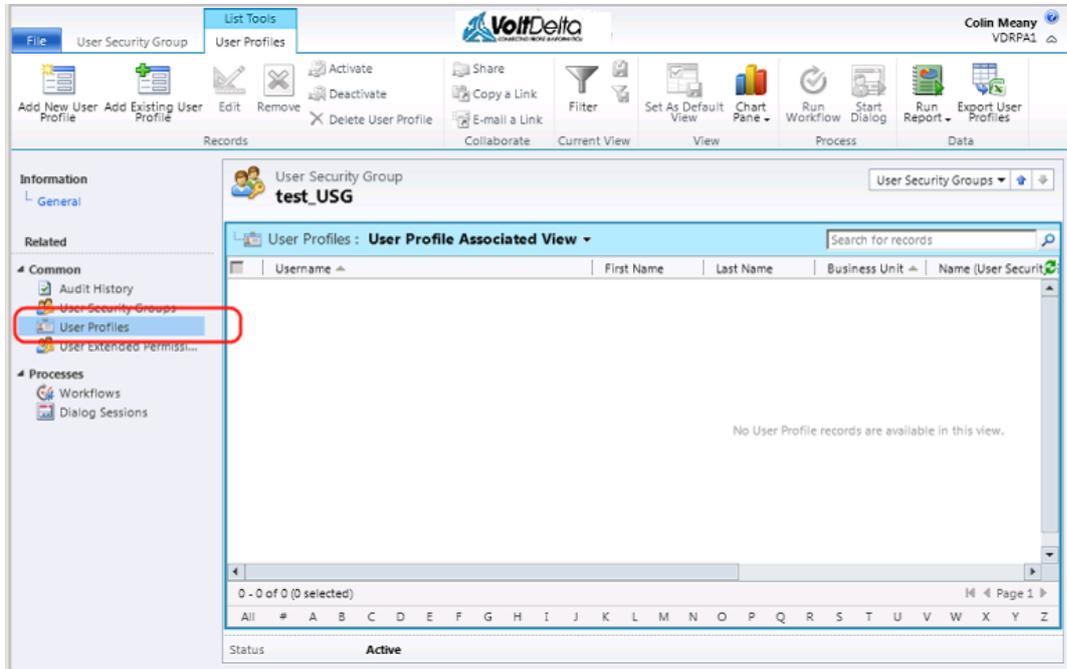
The screenshot shows the 'User Security Groups: Active User Security Groups' interface. The left navigation pane is expanded to 'User Management' > 'User Security Groups'. The main area displays a table of active user security groups.

Name	Business Unit	Parent User Security Group	Created On
admin	PABU2CTOP1		9/23/2013 5:52 PM
admin	pabu2cc1		9/23/2013 6:02 PM
agents	pabu2cc1		9/23/2013 6:23 PM
supervisor	PABU2CTOP1		6/26/2014 3:47 PM
test_USG	PABU2CTOP1		3/3/2014 3:35 PM

At the bottom of the interface, it indicates '1 - 5 of 5 (1 selected)' and provides a keyboard navigation bar with letters A through V.

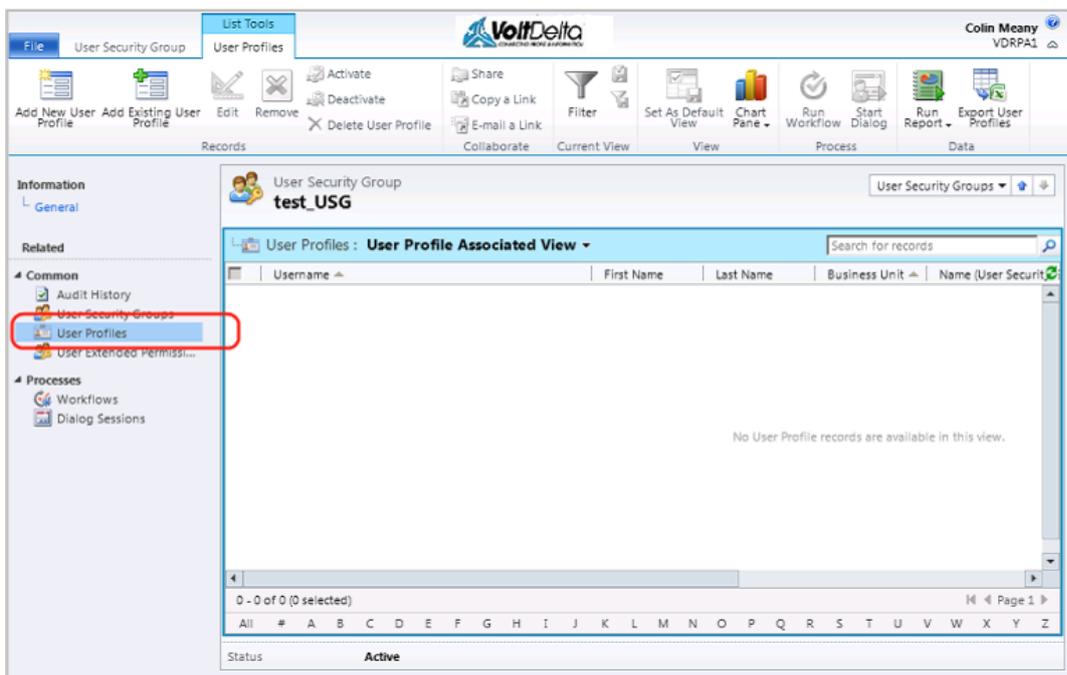
- Click the Name of the User Security Group to which you want to add a User

The User Security dialog is displayed:



- In the left navigation pane, click **Common** → **User Profiles**.

A list of associated User Profiles is displayed (if they exist), similar to the following



- 4 Click inside the User Profiles table to activate it.
- 5 Click the **All Users Under This User Security Group** table to activate it.
- 6 Click **Add Existing User Profile** to add a user to the group
A Look Up Records dialog is displayed
- 7 Select the Username record(s) to be added to the group.
- 8 Click **Add**
- 9 Click **OK**.

12.3 Classification Security Groups

Classification Security Groups are used to aggregate Classifications into groups so that Users can be given permission to view or access them. These groups can be hierarchical and are typically used in conjunction with the Classifications in your Business Unit so that you can structure who can access specific Classifications.

For example, these security groups are used to determine which users can use the Observe Classification feature and which Classifications they can observe.

(For details about configuring the Observe feature, refer to chapter 11.3.1.2, Granting User Access to the Observe Functions)

Additionally, these groups can be shared on the Management Portal, so that Users can be given access to the groups and members of the groups. Chapter 4, Sharing Entities provides additional information about sharing.



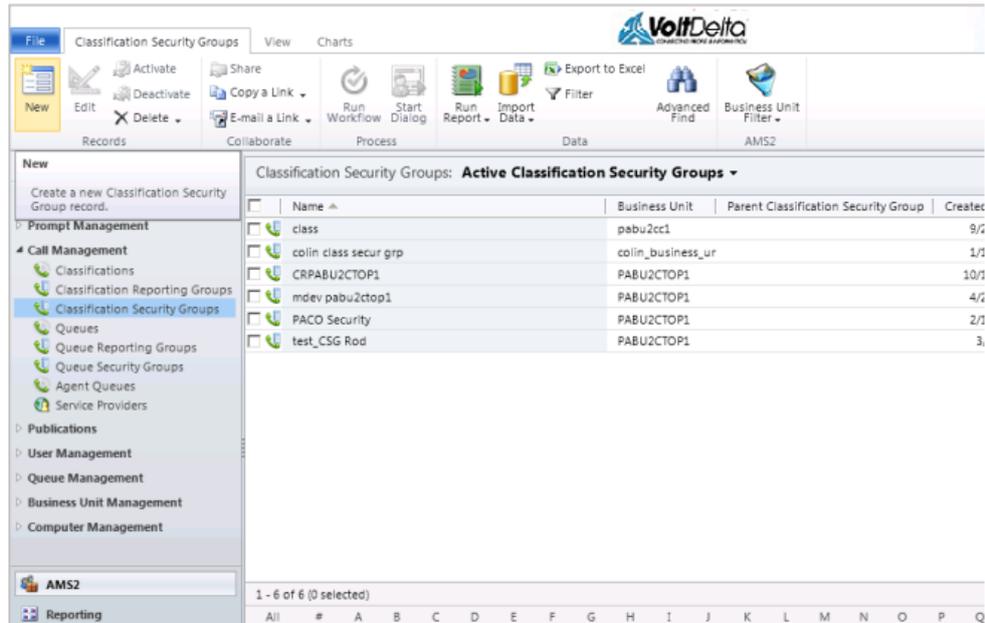
Note the following about Classification Security Groups

- A Classification can be a member of only one Classification Security Group
- A Classification Security Group can contain Classifications from only the same Business Unit to which the group belongs

12.3.1 Creating Classification Security Groups

To create a Classification Security group, proceed as follows.

- 1 In the Management Portal navigation pane, select **Call Management** → **Classification Security Groups**:



- 2 Click **New** in the ribbon.

The New Classification Security Group dialog is displayed.

- 3 In the Name field, enter a name for the group.
- 4 Click the button next to the Business Unit field.
The Look Up Record dialog is displayed



Enter the first few letters of the Business Unit name in the Search field and click the **Search** button to find the desired Business Unit

- 5 Select the Business Unit and click **OK**
You are returned to the Classification Security Group dialog
- 6 Click **Save & Close** to create the group.

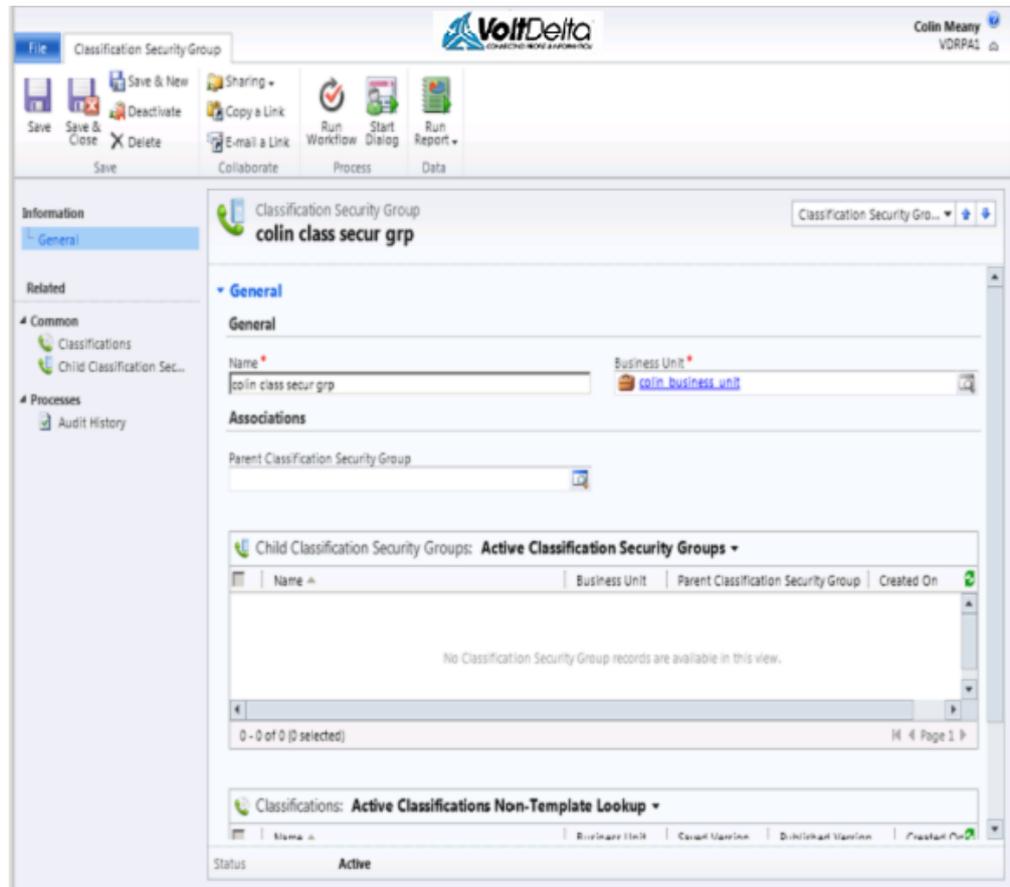
12.3.2 Assigning a Classification to a Classification Security Group

To assign a Classification to a Classification Security Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Classification Security Groups**.

- 2 Click the Classification Security Group to which you wish to assign one or more Classifications.

The Classification Security Group dialog is displayed for the selected group.



- 3 Click the **Classifications** area.
A new set of controls appears in the ribbon.
- 4 Click **Add Existing Call Type** in the ribbon.
The Look Up Records dialog is displayed,
- 5 Click the name of the desired Classification (Call Type) in the list to add it to the Selected Records section below. To select multiple entries, click their corresponding check boxes, and then click **Add**
- 6 Click **OK**
You are returned to the Classification Security Group dialog. The selected Classification(s) now appears in the Classifications area.
- 7 Click anywhere outside the Classifications section to restore the ribbon, then click **Save & Close**.

12.4 Queue Security Groups

Queue Security Groups are used to aggregate Queues into groups so that Users can be given permission to view or access them.

These groups can be hierarchical and are typically used in conjunction with the Queues within the system so that you can structure who can access specific Queues.

Queue Security Groups are typically shared on the Management Portal, allowing a User to be given access to the groups and their members. Chapter 4, Sharing Entities provides additional information about sharing.



Note the following

- A Queue can be a member of only one Queue Security Group
- A Queue Security Group can contain only Queues from the same Business Unit to which the Queue Security Group belongs

12.4.1 Creating a Queue Security Group

To create a Queue Security Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Queue Security Groups**.
- 2 Click **New** in the ribbon.

The New Queue Security Group dialog is displayed..

The screenshot shows the 'New Queue Security Group' dialog box. The 'General' tab is active, displaying the following fields:

- Name:** myQSG
- Business Unit:** (empty)
- Associations:**
 - Parent Queue Security Group:** (empty)

Below the fields is a table with the following columns: Name, Business Unit, Parent Queue Security Group, and Created On. The table is currently empty, and a message below it reads: "To enable this content, save the record." The status bar at the bottom indicates "0 - 0 of 0 (0 selected)" and "Page 1".

- 3 In the Name field, enter the name of the new Queue Security Group,

- 4 Click the button next to the Business Unit field.

The Look Up Record dialog is displayed.

Name	Domain Name	Main
colin_business_unit	colin.com	
dummyBU	eee	
pabu2account1	pabu2account1	
pabu2cc1	pabu2cc1	
PABU2CTOP1	PABU2CTOP1	
Roda_Test	Roda_Test	



Enter the first few letters of the Business Unit name in the Search field and click the **Search** button to find your Business Unit.

- 5 Select your Business Unit and click **OK**.
You are returned to the Queue Security Group dialog.
- 6 In the Parent Queue Security Group field, click the button next to the field, and then select the desired group name in the Look Up Record dialog that displays.
- 7 Click **Save & Close** to confirm your input and save the new Queue Security Group.

12.4.2 Assigning a Queue to a Queue Security Group



A Queue can be assigned to only one Queue Security Group

To assign a Queue to a Queue Security Group, proceed as follows:

- 1 In the Management Portal navigation pane, select **Call Management** → **Queue Security Groups**.
- 2 Click the Queue Security Group to which you want to assign one or more Queues.

The Queue Security Group dialog appears for the selected group.

The screenshot shows the 'Queue Security Group' dialog for 'colin test QSG'. The interface includes a ribbon with options like 'Save', 'Share', 'Copy a Link', and 'Run Workflow'. The main area is divided into 'Information' (General, Related) and 'Common' (Queues, Child Queue Security Groups). The 'General' tab is active, showing the 'Name' field set to 'colin test QSG' and the 'Business Unit' dropdown set to 'PARUXCTOP1'. Below this, there is an 'Associations' section with a 'Parent Queue Security Group' dropdown set to 'colin test QSG'. A table titled 'Child Queue Security Groups: Active Queue Groups' is currently empty, displaying a message: 'No Queue Security Group records are available in this view.' At the bottom, there is a section for 'Queues currently in this group: Active Queues Non-Template' with a table header including 'Name', 'Business Unit', 'Created On', and 'Status'.

- 3 Click the **Queues currently in this group** section.
A new set of controls is displayed in the ribbon.
- 4 Click **Add Existing Call Type** in the ribbon.
The Look Up Records dialog is displayed

- 5 Click the name of the desired Queue (Call Type) in the list to add it to the Selected Records area of the dialog. To select multiple Queues, click their corresponding check boxes, and then click **Add**
- 6 Click **OK** to confirm your selection and return to the previous dialog. The selected Queue(s) now appear in the Queues currently in this group area of the dialog.
- 7 Click anywhere outside the Queues section to restore the ribbon, then click **Save & Close** to confirm your input.

13 Managing Queues and Skill Sets

13.1 Overview

This chapter provides information on the following topics:

- User Management Overview
- Creating Queues and Skill Sets
- Assigning Queues and Skill Sets

13.2 User Management Overview

Depending on the workforce strategy of your company, the administrator must create one or more of the following to enable Agent Users to receive and service calls:

- Individual Queues.
- Aggregate Queues, which are collections of one or more Queues.
- Agent Select Skill Groups, which are collections of Queues that an Agent can selectively log on to.

Once these have been defined, the administrator assigns Users to these Queues, although Users can also be assigned to simple individual Queues (refer to chapter 13.4, Assigning Queues and Skill Sets for details).

13.3 Creating Queues and Skill Sets

This chapter contains the following topics:

- Creating a Queue
- Creating an Agent Select Skill Group
- Creating an Aggregate Queue Group

13.3.1 Creating a Queue

For information on creating a Queue, refer to chapter 3.3.1, Assigning Queues and Skill Sets Creating a Queue.

For information on assigning Users to an individual Queue, refer to chapter 13.4.1, Assigning Users to Individual Queues.

13.3.2 Creating an Agent Select Skill Group

Agent Select Skill Groups are used to provide optional groupings of Queues to form Skill Sets that Agents can use to log on.

An Agent can log on to a different Skill Set to provide a different set of services. Each Queue in the Skill Set can be assigned a User Priority

Queues and User Profiles can belong to more than one Agent Select Skill Group.

To create an Agent Select Skill Group and assign its Agent Skill Group Queues, do the following, proceed as follows:

- 1 In the Management Portal navigation pane, select **Queue Management** → **Agent Select Skill Groups**.
- 2 Click **New** in the ribbon.

The New Agent Select Skill Group dialog is displayed.

- 3 In the Name field, enter the name of the new Agent Select Skill Group. When specifying a name, do not enter the apostrophe character (').

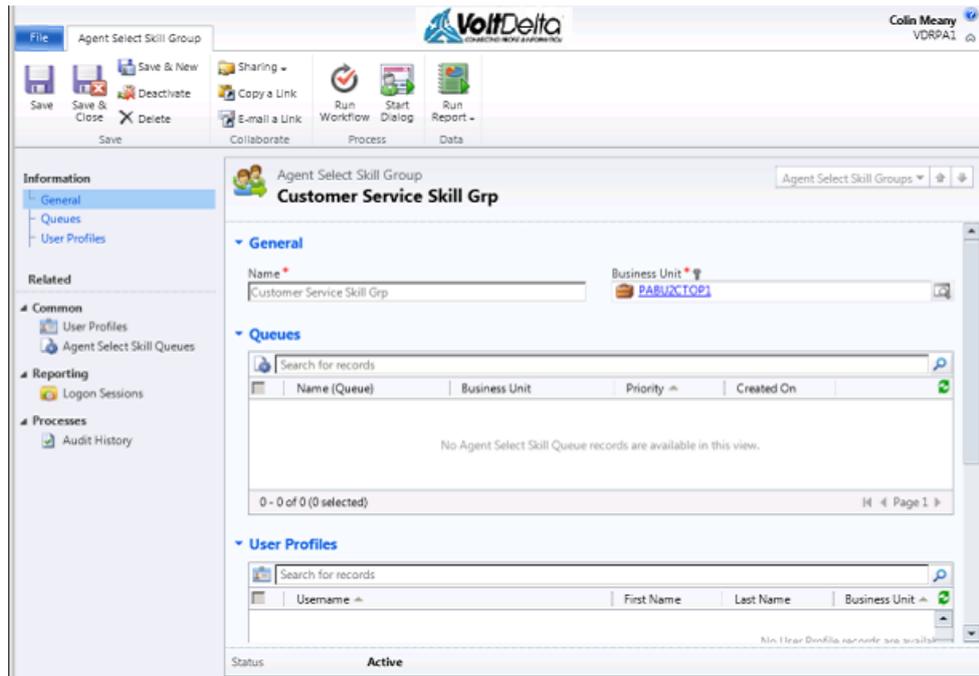


The maximum allowed name length is 26 characters.

- 4 In the Business Unit field, select the Business Unit for the new Agent Select Skill Group

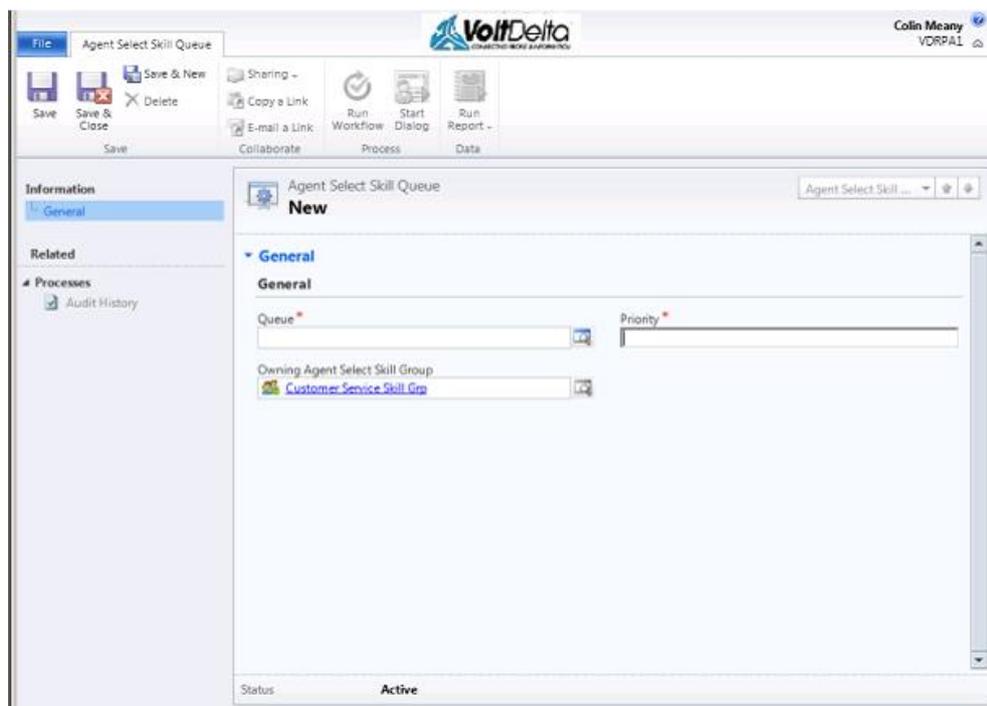
5 Click **Save** in the ribbon

The Queue and User Profiles tables are displayed



6 Click the Queues table, and then click **Add New Agent Select Skill Queue** in the ribbon.

The New Agent Select Skill Queue dialog is displayed



- 7 In the Queue field, select the desired Queue
- 8 In the Priority field, set the Priority value to the relative priority of the selected Queue for the user. When calls are available in multiple Queues, the Priority parameter determines which call is presented to the Agent. Values are -99 to 99, with 99 being the highest priority
- 9 Click **Save & Close**
The Agent Select Skill Group dialog is re-displayed
- 10 Repeat steps 6 through 9 for all the Agent Select Skill Queues required for the Agent Select Skill Group.
- 11 Click elsewhere inside the Agent Select Skill Group dialog to activate the Save & Close button in the ribbon, then click **Save & Close**



For information on assigning Users to Agent Select Skill Groups, refer to chapter 13.4.3, Assigning Users to Agent Select Skill Groups.

13.3.3 Creating an Aggregate Queue Group



Note the following about Aggregate Queues:

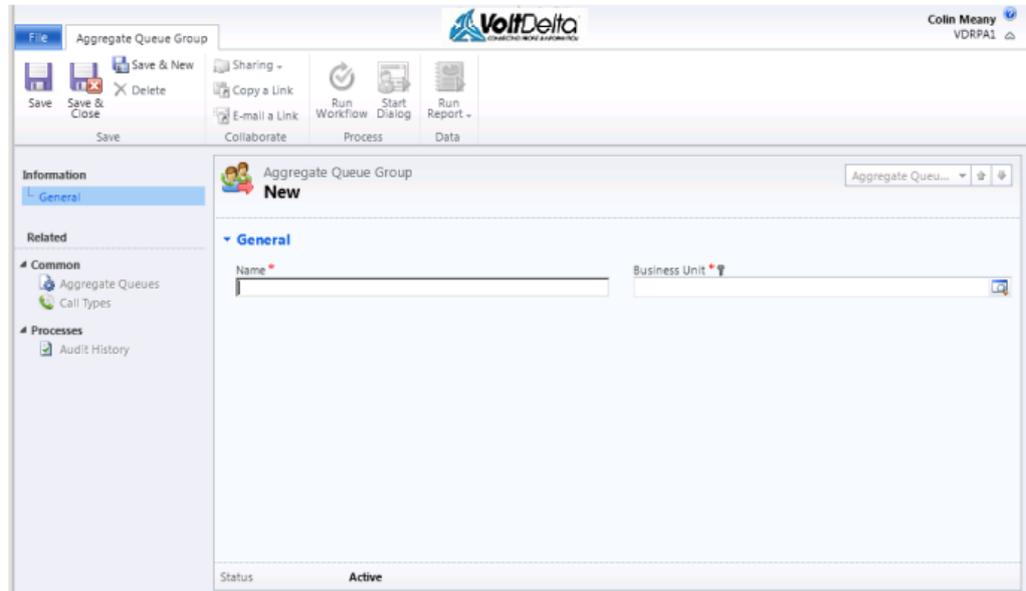
- Aggregate Queue Groups are used for aggregating several Queues into a single Queue view
- Queues can belong to only one Aggregate Queue Group. User Profiles can belong to more than one Aggregate Queue Group

To create an Aggregate Queue Group and assign its Aggregate Queues, proceed as follows:

- 1 In the Management Portal navigation pane, select **Queue Management → Aggregate Queue Groups**.

2 Click **New** in the ribbon.

The Create Aggregate Queue Group dialog is displayed



The screenshot shows the 'Aggregate Queue Group' dialog box in the VoltDelta software. The dialog is titled 'Aggregate Queue Group' and has a 'New' button. The 'General' tab is selected, showing a 'Name' field and a 'Business Unit' dropdown menu. The status is 'Active'.

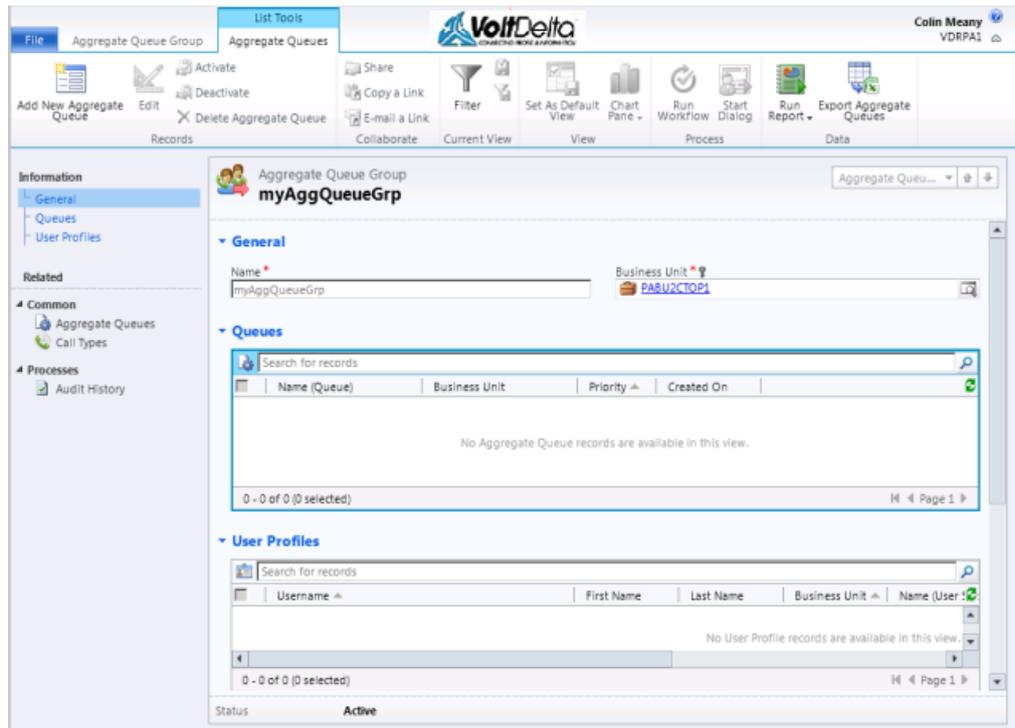
3 In the Name field, enter the name of the new Aggregate Queue Group. When specifying a name, do not enter the apostrophe character (').



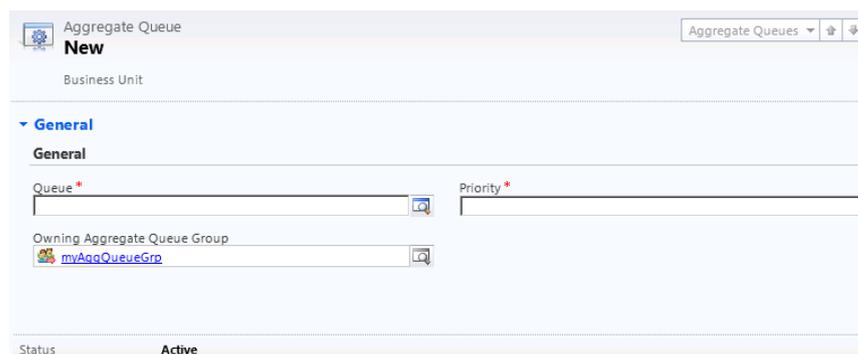
The maximum allowed name length is 26 characters.

4 In the Business Unit field, select the Business Unit for the new Aggregate Queue Group.

- 5 Click **Save** in the ribbon, then click elsewhere in the dialog
The Queues and User Profiles tables appear in the dialog.



- 6 Click the Queues table, and then click **Add New Aggregate Queue** in the ribbon
The New Aggregate Queue dialog is displayed.



- 7 In the Queue field, select the Queue
- 8 In the Priority field, set the Priority value to the relative priority of the selected Queue for the user



When calls are available in multiple Queues, the Priority parameter determines which call is presented to the Agent. Allowed values are -99 to 99, with 99 being the highest priority.

9 Click Save & Close

10 Repeat steps 6 through 9 for all the Aggregate Queues required for the Aggregate Queue Group

The Aggregate Queues appear in the Queues table

Name (Queue)	Business Unit	Priority	Created On
chevy sales	PABU2CTOP1	10	6/27/2014 11:37...
dodge sales	PABU2CTOP1	11	6/27/2014 11:38...
jeep sales	PABU2CTOP1	13	6/27/2014 11:39...

11 Click outside the Queues table to restore the ribbon, and then click Save & Close



For information on assigning Users to an Aggregate Queue Group, refer to chapter 13.4.2, Assigning Users to Aggregate Queue Groups.

13.4 Assigning Queues and Skill Sets

Three schemes are available for assigning the Queues that an Agent will service.



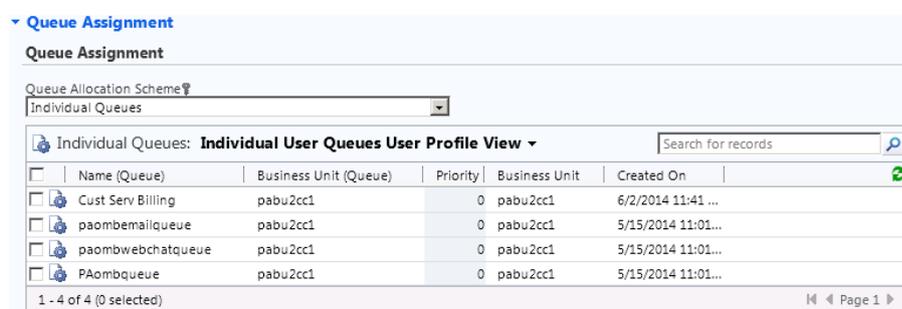
Agents can also service their own personal Agent Queues as described in Chapter 14, Personal Agent Queues.

The Table below describes the available methods for assigning queues to Agents.

Queue Allocation Scheme	Description
Individual Queues	One or more individual Queues are chosen for the User to service. For the procedure, refer to chapter 13.4.1, Assigning Users to Individual Queues.

Queue Allocation Scheme	Description
Aggregate Queues	<p>An Aggregate Queue is a group of one or more Queues. An Aggregate Queue can be assigned to one or more Users. This is useful where a group of Users will all service the same set of Queues. Multiple Aggregate Queue groups can be assigned to a User.</p> <p>For the procedure, refer to chapter 13.4.2, Assigning Users to Aggregate Queue Groups.</p>
Agent Select Skill Group	<p>An Agent Select Skill Group is similar to an Aggregate Queue. However, more than one Agent Select Skill Group can be assigned to a User, and Users are prompted to select the required Skill Group when they log on to their call handling application (e.g. SmartStation or Media Bar).</p> <p>For the procedure, refer to chapter 13.4.3, Assigning Users to Agent Select Skill Groups.</p>

The Queue Allocation Scheme (method) is selected in the Queue Assignment area of the User Profile dialog, shown in the figure below:



The following chapters describe how to configure each of the schemes.

13.4.1 Assigning Users to Individual Queues

You can assign one or more Users to one or more individual Queues by doing either of the following:

- Assigning via the User Profile
- Assigning via the Queue Profile

13.4.1.1 Assigning via the User Profile

To use the User Profile to add one or more individual Queues for one or more Users, proceed as follows:

- 1 In the Management Portal navigation pane, choose **User Management → User Profiles**.
- 2 Select one or more User Profiles you wish for Queue Assignments.

The screenshot displays the 'Assign Queues to Users' window in the VoltDelta Management Portal. The interface features a navigation pane on the left, a toolbar at the top, and a main table of user profiles. The 'User Profiles' section in the navigation pane is expanded, showing options like 'User Reporting Groups', 'User Security Groups', and 'User Extended Permissions'. The main table lists various user profiles, with four selected (agent1@pabu2cc1, agent2@pabu2cc1, agent3@pabu2cc1, and agent4@pabu2cc1). The table columns include First Name, Last Name, Business Unit, Name (User Security Group), and Is Temporarily Disabled.

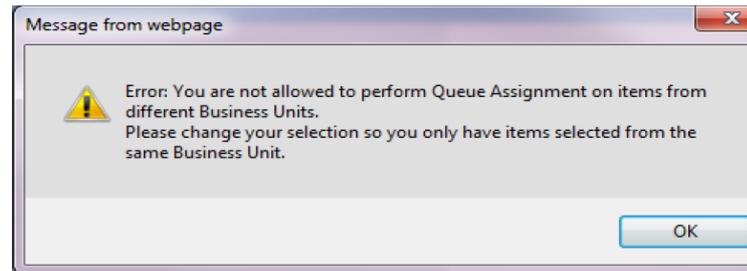
	First Name	Last Name	Business Unit	Name (User Security Group)	Is Temporarily Disabled
<input type="checkbox"/>	admin	pabu2ctop1	PABU2CTOP1	admin	No
<input type="checkbox"/>	adnan	aisamari	pabu2cc1	adnan@PABU2CTOP1	No
<input type="checkbox"/>	adnan	aisamari	PABU2CTOP1	admin	No
<input type="checkbox"/>	agent test	Quigley	PABU2CTOP1	admin	No
<input checked="" type="checkbox"/>	agent	1	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	2	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	3	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	4	pabu2cc1	agents	No
<input type="checkbox"/>	agent	template	pabu2cc1		Yes
<input type="checkbox"/>	bill	agent1	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent2	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent3	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent4	pabu2cc1	agents	No
<input type="checkbox"/>	bill	super1	pabu2cc1	agents	No
<input type="checkbox"/>	bob	template	pabu2cc1	agents	Yes
<input type="checkbox"/>	Carol	Kerner	PABU2CTOP1		No
<input type="checkbox"/>	cis	test1	pabu2cc1		No
<input type="checkbox"/>	cis	test2	pabu2cc1		No
<input type="checkbox"/>	colin	user profile	colin_business_ur		No
<input type="checkbox"/>	colin	agent1	pabu2cc1	agents	No

3 Click **Assign Queues** in the ribbon.

The Queue Assignment dialog is displayed



If you are adding more than one User Profile, ensure the selected records belong to the same Business Unit. If the selected records belong to multiple Business Units, the following error message is displayed:



4 From the Queue Allocation Scheme drop-down menu, choose **Individual Queues**.

The screenshot shows the 'Queue Assignment' dialog box. The 'Queue Allocation Scheme' dropdown menu is set to 'Individual Queues'. Below it, the 'Update Queue Allocation Scheme in User Profiles?' checkbox is checked. The 'Priority' is set to 3. A table below shows 'Queues assigned to current Queue Assignment: Active Queues Non-Template' with columns for Name, Business Unit, Saved Version, Published Version, Created On, and Modified On. The table is currently empty, showing 'No Call Type records are available in this view.'

5 To override the existing Queue Allocation Scheme for all the selected User Profiles, set “Update Queue Allocation Scheme in User Profiles?” to **Yes**

- 6 To replace the Priority for existing Individual User Queues, set “Update Priority for Existing Records?” field to **Yes**.



The priority field is used to populate Priority for each of the new Individual User Queues to be created.

- 7 In the Priority field, set the Priority value to the relative priority of the selected Queue for the user(s)

When calls are available in multiple Queues, the Priority parameter determines which call is presented to the Agent.



Allowed values are -99 to 99, with 99 being the highest priority.

- 8 Click the **Queues assigned to current Queue Assignment** table and then click **Add Existing Call Type** in the ribbon

The Look Up Records dialog is displayed with a list of available Queues

- 9 Select the Queues required and click **OK**

The selected Queues appear in the Queues assigned to current Queues Assignment table

The screenshot shows the VoltDelta Queue Assignment configuration page. The 'Queue Assignment' ribbon is active, with the 'Add Existing Call Type' button highlighted. The 'Information' section is expanded to 'General', showing the 'Queue Allocation Scheme' set to 'Individual Queues' and 'Update Queue Allocation Scheme in User Profiles?' set to 'Yes'. The 'Priority' field is set to '5'. Below, the 'Queues assigned to current Queue Assignment' table is visible, showing two selected queues: 'Cust Serv' and 'Cust Serv Lobby'.

Name	Business Unit	Saved Version	Published Version	Created On	Modified On
Cust Serv	pabu2cc1	16	16	9/19/2013 2:40 ...	4/15/2014 9:34 ...
Cust Serv Lobby	pabu2cc1	8	8	9/30/2013 10:03...	4/30/2014 12:14...

- 10 Click elsewhere in the Queue Assignment dialog to bring the Queue Assignment tab into focus in the ribbon, then click **Assign Queue(s)**

 in the ribbon.



Although appearing to be assigned, the actual Queue Assignment occurs only after the Assign Queues button is clicked.

- 11 Optionally, to unassign one or more selected Queue assignments, click **UnAssign Queue(s)**  in the ribbon

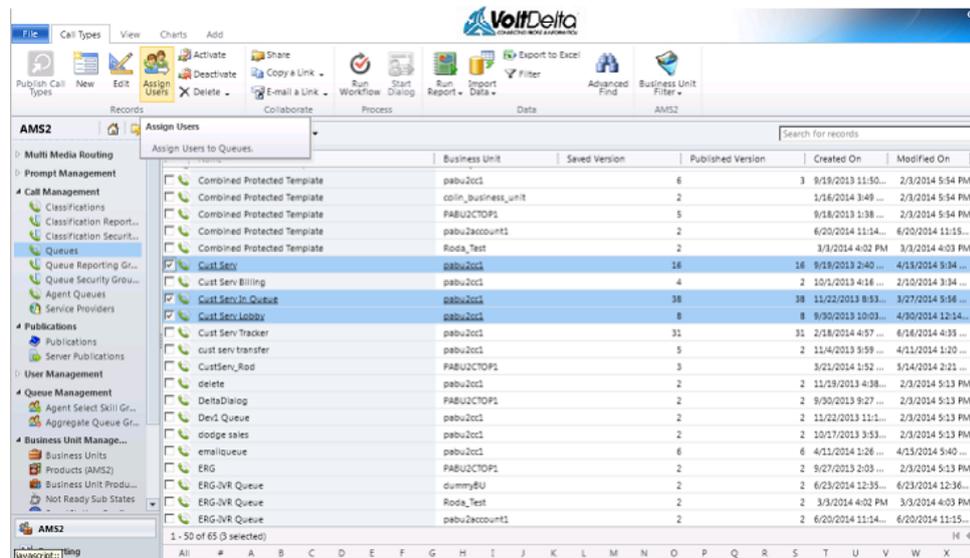


The fields “Update Queue Allocation Scheme in User Profiles?” and “Update Priority For Existing Records?” are ignored in an UnAssign operation.

13.4.1.2 Assigning via the Queue Profile

To use the Queue Profile to add one or more individual Queues for one or more Users, proceed as follows:

- 1 In the Management Portal navigation pane, choose **User Management → Queues**.
- 2 Select one or more Queues you wish for Queue Assignments.

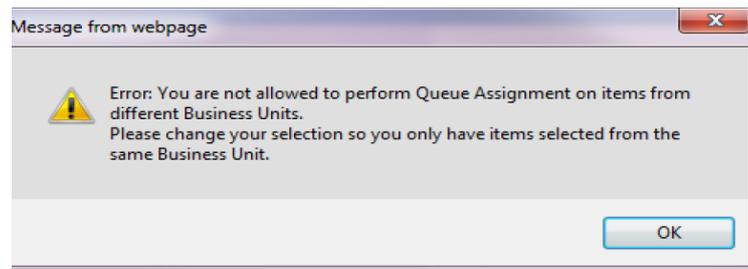


Queue Name	Business Unit	Saved Version	Published Version	Created On	Modified On
Combined Protected Template	pebu2ec1	6	3	9/19/2013 11:50...	2/3/2014 5:54 PM
Combined Protected Template	ccbu_business_unit	2		1/16/2014 3:49 ...	2/3/2014 5:54 PM
Combined Protected Template	PABU2CTOP1	5		9/18/2013 1:38 ...	2/3/2014 5:54 PM
Combined Protected Template	pebu2account1	2		6/20/2014 11:14...	6/20/2014 11:15...
Combined Protected Template	Roda_Test	2		3/3/2014 4:02 PM	3/3/2014 4:03 PM
Cust Serv	pebu2ec1	16	16	9/19/2013 2:49 ...	4/15/2014 9:34 ...
Cust Serv Billing	pebu2ec1	4	2	10/1/2013 4:16 ...	2/10/2014 9:34 ...
Cust Serv In Queue	pebu2ec1	38	38	11/22/2013 8:53 ...	3/27/2014 9:56 ...
Cust Serv Lobby	pebu2ec1	8	8	9/30/2013 10:03 ...	4/30/2014 12:14 ...
Cust Serv Tracker	pebu2ec1	31	31	2/18/2014 4:57 ...	6/16/2014 4:35 ...
cust serv transfer	pebu2ec1	5	2	11/4/2013 9:59 ...	4/11/2014 1:20 ...
CustServ_Rod	PABU2CTOP1	3		3/21/2014 1:52 ...	5/14/2014 2:21 ...
delete	pebu2ec1	2	2	11/19/2013 4:38 ...	2/3/2014 5:13 PM
DeltaDialog	PABU2CTOP1	2	2	9/30/2013 9:27 ...	2/3/2014 5:13 PM
DevQ Queue	pebu2ec1	2	2	11/22/2013 11:1...	2/3/2014 5:13 PM
codge sales	pebu2ec1	2	2	10/17/2013 3:53...	2/3/2014 5:13 PM
emailqueue	pebu2ec1	6	6	4/11/2014 1:26 ...	4/15/2014 9:40 ...
ERG	PABU2CTOP1	2	2	9/27/2013 2:03 ...	2/3/2014 5:13 PM
ERG InR Queue	dummyBU	2	2	6/23/2014 12:35...	6/23/2014 12:36...
ERG InR Queue	Roda_Test	2	2	3/3/2014 4:02 PM	3/3/2014 4:03 PM
ERG InR Queue	pebu2account1	2	2	6/20/2014 11:14...	6/20/2014 11:15...

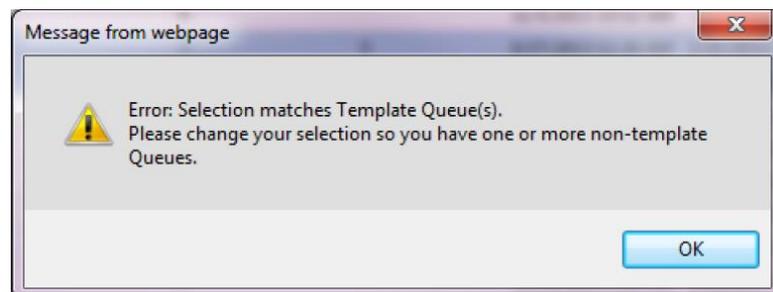
3 Click **Assign Users** in the ribbon.



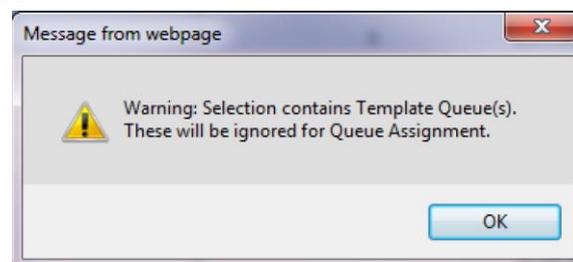
If you are adding more than one Queue, ensure the selected records belong to the same Business Unit. If the selected records belong to multiple Business Units, the following error message is displayed:



If the selection contains only template records, the following error message is displayed since Template Queues are not supported:



If the selection contains one more template records, the Queue Assignment proceeds but a warning message is displayed, as follows. Template Queues will be ignored in the Queue Assignment process as template Queues are not supported:



The Queue Assignment dialog is displayed.

- 4 To override the existing Queue Allocation Scheme for all the selected Queues, set “Update Queue Allocation Scheme in User Profiles?” to **Yes**
- 5 To replace Priority for existing Individual User Queues, set “Update Priority for Existing Records?” to **Yes**. The priority field is used to assign the Priority for each of the new Individual User Queues to be created
- 6 In the Priority field, set the Priority value to the relative priority of the selected Queue for the user(s)



When calls are available in multiple Queues, the Priority parameter determines which call is presented to the Agent. Allowed values are -99 to 99, with 99 being the highest priority.

- 7 Click the **Users to assign to current Queue Assignment** table and then click **Add Existing User Profile** in the ribbon

The Look Up Records dialog is displayed with a list of User Profiles.

- 8 Select the Users required and click **Ok**

The selected Users appear in the Users to assign to current Queue Assignment table.

- 9 Click elsewhere in the Queue Assignment dialog to bring the Queue Assignment tab into focus in the ribbon, then click **Assign Queue(s)**  in the ribbon

 Although appearing to be assigned, the actual Queue Assignment occurs only after this button is clicked.

- 10 Optionally, to unassign one or more selected Queue assignments, click **UnAssign Queue(s)**  in the ribbon

 The fields “Update Queue Allocation Scheme in User Profiles?” and “Update Priority For Existing Records?” are ignored in an UnAssign operation.

13.4.2 Assigning Users to Aggregate Queue Groups

You can assign one or more users to one or more Aggregate Queue Groups by doing either of the following:

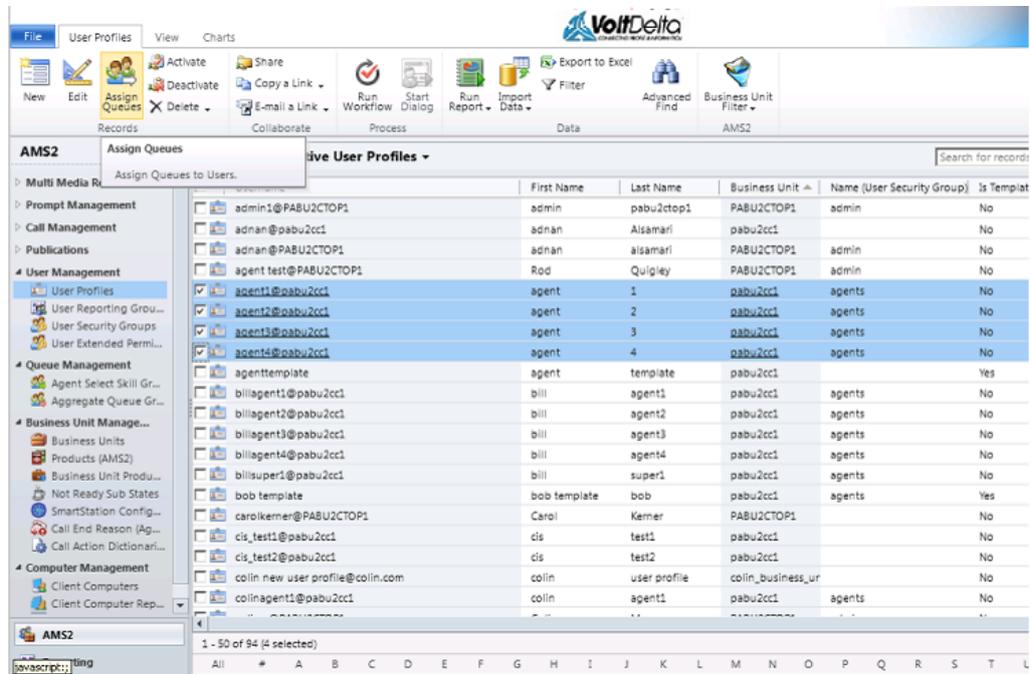
- Assigning via the User Profile
- Assigning via the Aggregate Queue Groups profile

13.4.2.1 Assigning via the User Profile

To use the User Profile to add one or more users to one or more Aggregate Queue Groups, proceed as follows:

- 1 In the Management Portal navigation pane, choose **User Management → User Profiles**

- 2 Select one or more User Profiles you wish for Queue Assignments, then click **Assign Queues** in the ribbon.

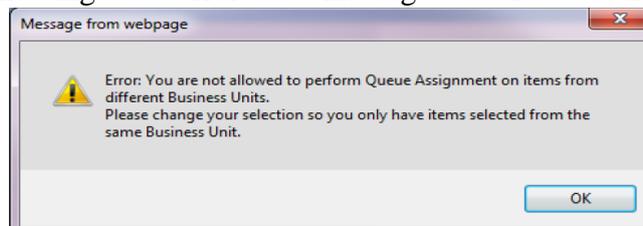


The screenshot shows the VoIPDelta AMS2 software interface. The 'Assign Queues' ribbon is active, and the 'Live User Profiles' table is displayed. The table contains the following data:

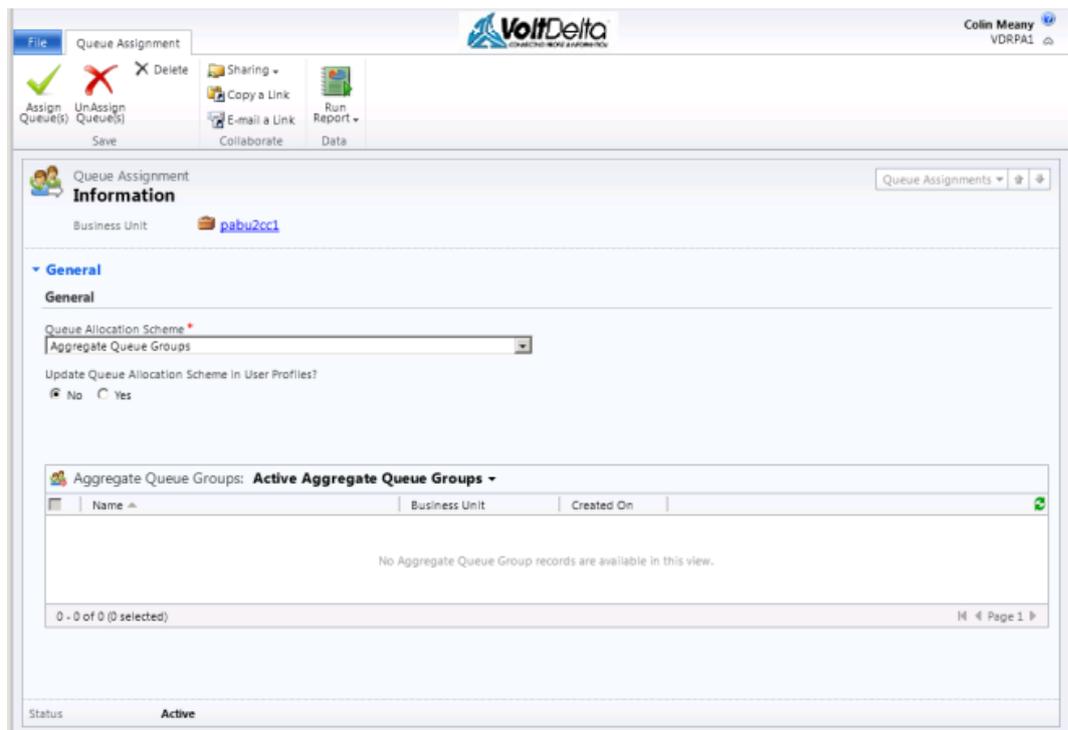
	First Name	Last Name	Business Unit	Name (User Security Group)	Is Templat
<input type="checkbox"/>	admin	pabu2ctop1	PABU2CTOP1	admin	No
<input type="checkbox"/>	adnan	Alsamari	pabu2cc1		No
<input type="checkbox"/>	adnan	alsamari	PABU2CTOP1	admin	No
<input type="checkbox"/>	Rod	Quigley	PABU2CTOP1	admin	No
<input checked="" type="checkbox"/>	agent	1	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	2	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	3	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	4	pabu2cc1	agents	No
<input type="checkbox"/>	agent	template	pabu2cc1		Yes
<input type="checkbox"/>	bill	agent1	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent2	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent3	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent4	pabu2cc1	agents	No
<input type="checkbox"/>	bill	super1	pabu2cc1	agents	No
<input type="checkbox"/>	bob	template	pabu2cc1	agents	Yes
<input type="checkbox"/>	Carol	Kerner	PABU2CTOP1		No
<input type="checkbox"/>	cis	test1	pabu2cc1		No
<input type="checkbox"/>	cis	test2	pabu2cc1		No
<input type="checkbox"/>	colin	user profile	colin_business_ur		No
<input type="checkbox"/>	colin	agent1	pabu2cc1	agents	No



If you are adding more than one User Profile, ensure the selected records belong to the same Business Unit. If the selected records belong to multiple Business Units, the following error message is displayed:



The Queue Assignment dialog is displayed



- 3 From the Queue Allocation Scheme drop-down menu, choose **Aggregate Queue Groups**.
- 4 To override the Queue Allocation Scheme for all the selected User Profiles, set the field “Update Queue Allocation Scheme in User Profiles?” to **Yes**
- 5 Click the **Aggregate Queue Groups** table, then click **Add Existing Aggregate Queue Group** in the ribbon
The Look Up Records dialog is displayed with a list of groups.
- 6 Select the groups required and click **OK**
The selected groups appear in the Aggregate Queue Groups table.
- 7 Click elsewhere in the Queue Assignment dialog to bring the Queue Assignment tab into focus in the ribbon, then click **Assign Queue(s)** () in the ribbon



Although appearing to be assigned, the actual Queue Assignment occurs only after this button is clicked.

- 8 Optionally, to unassign one or more selected Queue assignments, click **UnAssign Queue(s)** () in the ribbon



The field “Update Queue Allocation Scheme in User Profiles?” is ignored in an UnAssign operation.

13.4.2.2 Assigning via the Aggregate Queue Groups profile

To use the Aggregate Queue Profile to add one or more Users for one or more Aggregate Queue Groups, proceed as follows:

- 1 In the Management Portal navigation pane, choose **Queue Management → Aggregate Queue Groups**
- 2 In the left-hand window pane, under Queue Management, click **Select one or more groups you wish for Queue Assignments**, then click **Assign Users** in the ribbon.

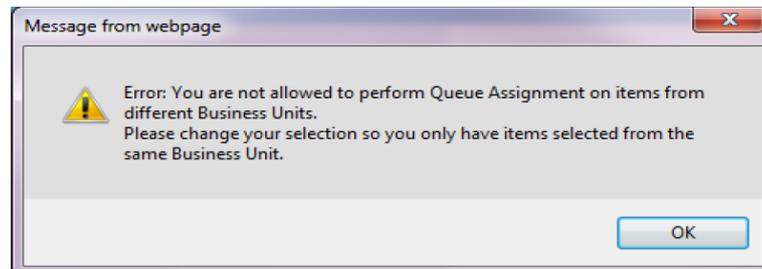
The screenshot shows the VoIPDelta AMS2 interface. The ribbon is set to 'Assign Users' with the 'Assign Users to Aggregate Queue' option selected. The main area displays a table of 'Active Aggregate Queue Groups' with the following data:

Aggregate Queue Group	Business Unit	Created On
colin agg queue grp	colin_business_unit	3/27/2014 6:00 ...
colin agg queue grp	colin_business_unit	3/27/2014 3:35 ...
myAppQueueGrp	PABU2CTOP1	6/27/2014 11:28...
PA Queue1	pabu2cc1	2/20/2014 11:45...
test Aggregate Queue Grp	pabu2cc1	2/19/2014 4:37 ...
test_AQG	PABU2CTOP1	3/3/2014 3:50 PM

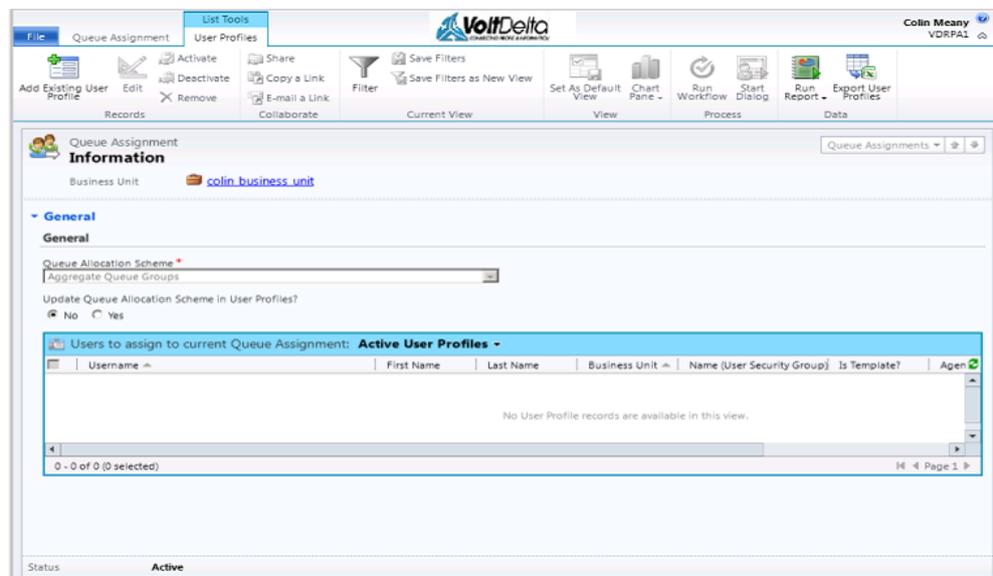
The interface also shows a navigation pane on the left with 'Queue Management' expanded to 'Aggregate Queue Groups'. The status bar at the bottom indicates '1 - 6 of 6 (2 selected)'.



If you are adding multiple records, ensure the selected records belong to the same Business Unit. If the selected records belong to multiple Business Units, the following error message is displayed:



The Queue Assignment dialog is displayed.



- 3 To override the Queue Allocation Scheme for all the selected Queues, set “Update Queue Allocation Scheme in User Profiles?” to **Yes**.
- 4 Click the **Users to assign to current Queue Assignment** table, then click **Add Existing User Profile** in the ribbon”.
The Look Up Records dialog is displayed with a list of User Profiles.
- 5 Select the Users required and click **OK**
The selected Users appear in the Users to assign to current Queue Assignment table.

- 6 Click elsewhere in the Queue Assignment dialog to bring the Queue Assignment tab into focus in the ribbon, then click **Assign Queue(s)**

 in the ribbon.



Although appearing to be assigned, the actual Queue Assignment occurs only after this button is clicked.

- 7 Optionally, to un-assign one or more selected Queue assignments, click **UnAssign Queue(s)**  in the ribbon



The field “Update Queue Allocation Scheme in User Profiles?” is ignored in an UnAssign operation.

- 8 The Queue Assignment form also provides a “**UnAssign Queue(s)**” button which can be used to unassign selected existing

13.4.3 Assigning Users to Agent Select Skill Groups

You can assign one or more Users to one or more Agent Select Skill Groups by doing either of the following:

- Assigning via the User Profile
- Assigning via the Agent Select Skill Groups profile

13.4.3.1 Assigning via the User Profile

To use the User Profile dialog to assign one or more Users to one or more Agent Select Skill Groups, proceed as follows:

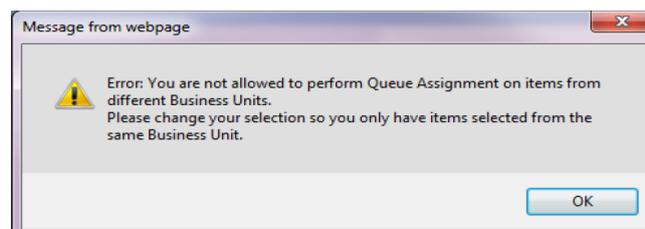
- 1 In the Management Portal navigation pane, choose **User Management → User Profiles**

- 2 Select one or more User Profiles you wish for Queue Assignments, then click **Assign Queues** in the ribbon.

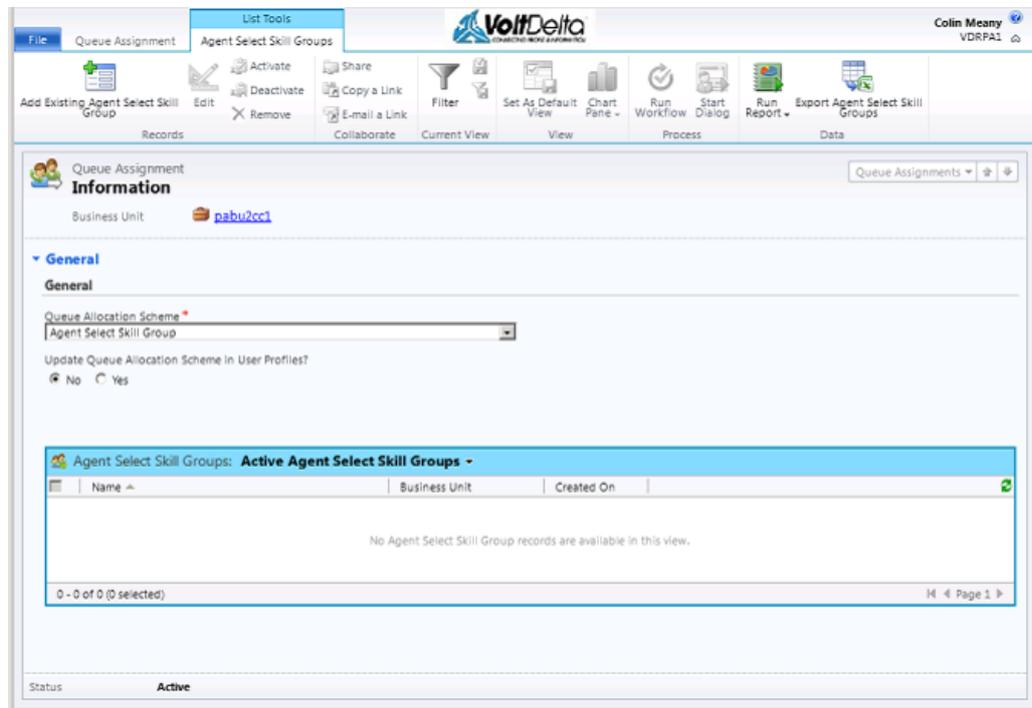
	First Name	Last Name	Business Unit	Name (User Security Group)	Is Tem
<input type="checkbox"/>	admin	pabu2ctop1	PABU2CTOP1	admin	No
<input type="checkbox"/>	adnan	Alsamari	pabu2cc1		No
<input type="checkbox"/>	adnan	alsamari	PABU2CTOP1	admin	No
<input type="checkbox"/>	agent test	Quigley	PABU2CTOP1	admin	No
<input checked="" type="checkbox"/>	agent	1	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	2	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	3	pabu2cc1	agents	No
<input checked="" type="checkbox"/>	agent	4	pabu2cc1	agents	No
<input type="checkbox"/>	agent	template	pabu2cc1		Yes
<input type="checkbox"/>	bill	agent1	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent2	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent3	pabu2cc1	agents	No
<input type="checkbox"/>	bill	agent4	pabu2cc1	agents	No
<input type="checkbox"/>	bill	super1	pabu2cc1	agents	No
<input type="checkbox"/>	bob	template	pabu2cc1	agents	Yes
<input type="checkbox"/>	Carol	Kerner	PABU2CTOP1		No
<input type="checkbox"/>	cis	test1	pabu2cc1		No
<input type="checkbox"/>	cis	test2	pabu2cc1		No
<input type="checkbox"/>	collin	user profile	collin_business_ur		No
<input type="checkbox"/>	collin	agent1	pabu2cc1	agents	No



If you are adding more than one record, ensure the selected records belong to the same Business Unit. If the selected records belong to multiple Business Units, the following error message is displayed:



The Queue Assignment dialog is displayed:



- 3 From the Queue Allocation Scheme drop-down menu, select **Agent Select Skill Group**.
- 4 To override the Queue Allocation Scheme for all the selected User Profiles, set “Update Queue Allocation Scheme in User Profiles?” to **Yes**.
- 5 Click the **Agent Select Skill Groups** table, and then click **Add Existing Agent Select Skill Group** in the ribbon
The Look Up Records window is displayed a list of groups.
- 6 Select the desired groups and click **OK**
The selected groups appear in the Agent Select Skill Groups table
- 7 Click elsewhere in the Queue Assignment dialog to bring the Queue Assignment tab into focus in the ribbon, then click **Assign Queue(s)** () in the ribbon.



Although appearing to be assigned, the actual Queue Assignment occurs only after this button is clicked.

- 8 Optionally, to unassign one or more selected Queue assignments, click **UnAssign Queue(s)** () in the ribbon

13.4.3.2 Assigning via the Agent Select Skill Groups profile

To assign one or more Users to one or more Agent Select Skill Groups, proceed as follows:

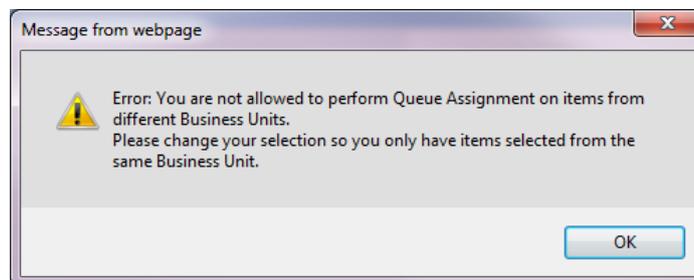
- 1 In the Management Portal navigation pane, choose **Queue Management → Agent Select Skill Groups**
- 2 Select one or more Agent Select Skill Groups you wish for Queue Assignments, then click **Assign Users** in the ribbon..

The screenshot shows the 'Assign Users' window in the VoIPDelta Management Portal. The ribbon includes buttons for 'Assign Users', 'Activate', 'Deactivate', 'Delete', 'Share', 'Copy a Link', 'E-mail a Link', 'Collaborate', 'Run Workflow', 'Start Dialog', 'Run Report', 'Import Data', 'Filter', 'Export to Excel', 'Advanced Find', and 'Business Unit Filter'. The main area displays a table of 'Active Agent Select Skill Groups' with columns for 'Business Unit' and 'Created On'. Three records are selected, all belonging to the 'colin_business_unit'.

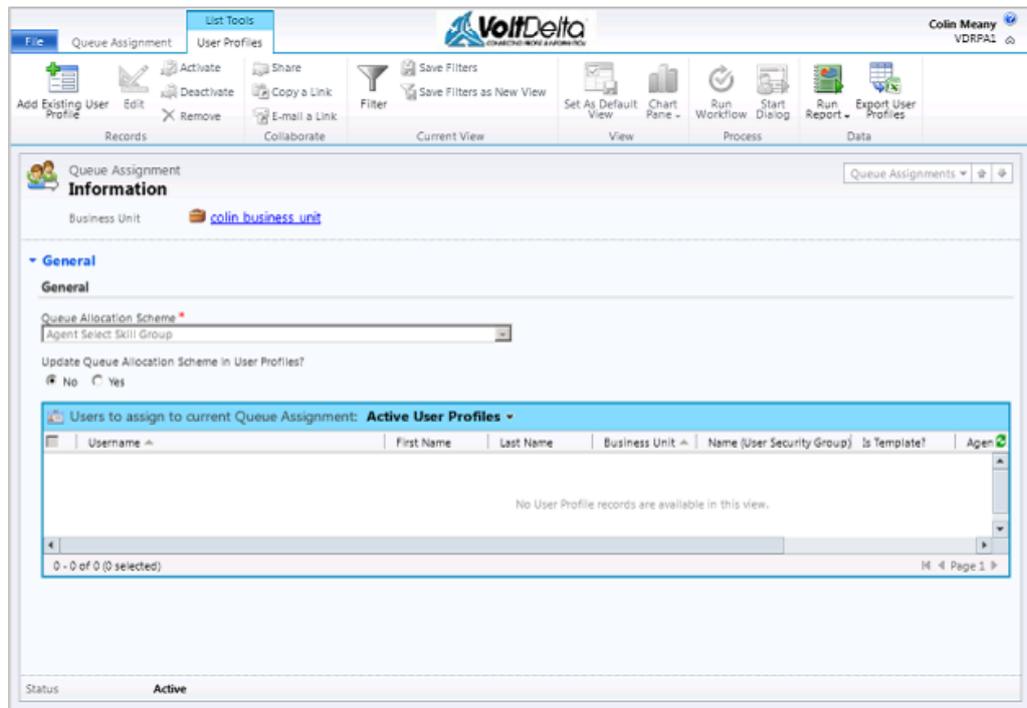
Business Unit	Created On
colin_business_unit	1/28/2014 8:36 ...
colin_business_unit	3/27/2014 3:33 ...
colin_business_unit	3/27/2014 6:40 ...
colin_business_unit	1/28/2014 4:49 ...
colin_business_unit	3/27/2014 6:51 ...
colin_business_unit	1/28/2014 8:10 ...
colin_business_unit	1/28/2014 5:50 ...
PABU2CTOP1	3/3/2014 3:49 PM
PABU2CTOP1	6/27/2014 12:22...
colin_business_unit	1/28/2014 8:28 ...



If you are adding more than one record, ensure the selected records belong to the same Business Unit. If the selected records belong to multiple Business Units, the following error message is displayed:



The Queue Assignment dialog is displayed.



- 3 To override the Queue Allocation Scheme for all the selected Queues, set “Update Queue Allocation Scheme in User Profiles?” to **Yes**

- 4 Click the **Users to assign to current Queue Assignment** table, then click **Add Existing User Profile** in the ribbon

The Look Up Records dialog is displayed with a list of User Profiles.

- 5 Select the desired Users and click **OK**.

The selected Users appear in the Users to assign to current Queue Assignment table.

- 6 Click elsewhere in the Queue Assignment dialog to bring the Queue Assignment tab into focus in the ribbon, then click **Assign Queue(s)**

() in the ribbon.



Although appearing to be assigned, the actual Queue Assignment occurs only after this button is clicked

- 7 Optionally, to unassign one or more selected Queue assignments, click **UnAssign Queue(s)** () in the ribbon.



The field, “Update Queue Allocation Scheme in User Profiles?” is ignored in an UnAssign operation

14 Personal Agent Queues

14.1 Overview

- This chapter includes the following chapters:
- About Personal Agent Queues
- Configuring a Routing Plan for an Agent Queue
- Implementing Voicemail
- Configuring a User's E-mail Address

14.2 About Personal Agent Queues

Agent Queues provide a means of “direct dialing” an Agent. An Agent is assigned a telephone number and/or e-mail address, through which the Agent can be reached. Like any other call, the call is received using the call handling application (for example, SmartStation or Media Bar). The Agent DDI Routing Step (chapter 7.5.1, Agent DDI Queue) can be used to route calls to the Agent Queue.

The Management Portal automatically creates a Personal Agent Queue for a user when the Telephone Number and Priority fields are populated in the “Agent Queue” area of the User Profile dialog for a user.

The figure and table below shows and describes the Agent Queue area of the User Profile dialog.

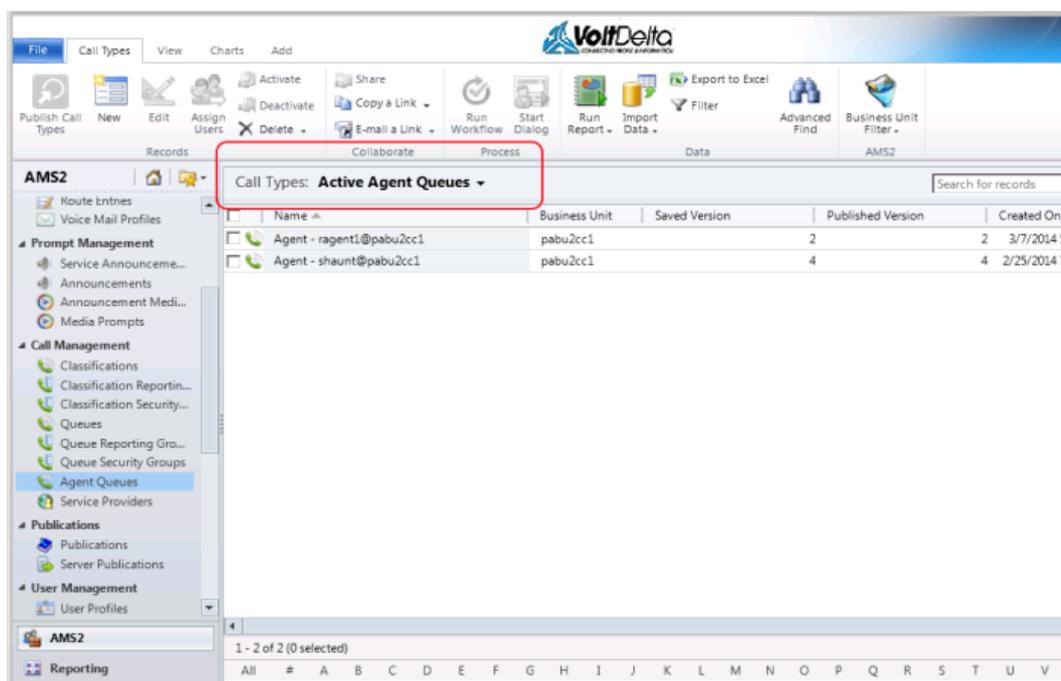
The screenshot shows a form titled "Agent Queue" with three input fields. The "Telephone Number" field contains the value "151". The "Priority" field contains the value "0". The "E-mail Address" field contains the value "151@ams2intb5v2.voltdelta.net".

Field	Description
Telephone Number	The Telephone Number entered in the User record is the exact number that must be received and used to identify the Routing Plan. If required, use the translation field in the Service Address (see chapter 6.5, Creating and Assigning a Service Address) to ensure an exact match. The Telephone Number can also be populated with a fully qualified number (e.g. 151 or 151@426@asipendpoint*).

Field	Description
<ul style="list-style-type: none"> ○ Priority 	<ul style="list-style-type: none"> ○ The priority used for calls assigned to the Agent Queue. Values are -99 to 99, with 99 being the highest priority.
<ul style="list-style-type: none"> ○ E-mail Address 	The e-mail address used for the Agent Queue. This value is used in conjunction with the Voice Mail routing step. For the Agent DDI Queue Routing Step, if this E-Mail Address field is populated, then it is used instead of the configured Voice Mail e-mail address

Once a personal Agent Queue has been created, the administrator will most likely need to edit its attributes.

To access the Personal Agent Queues, in the Management Portal navigation pane, select **Call Management** → **Agent Queues**. The Figure below shows the active Personal Agent Queues. You can change the Call Type view to display Personal Agent Queues that have not been activated.



Click the name of the Agent Queue that you want to view. The Agent Queue is displayed, as shown in the figure below:

Agent - ragent1@pabu2cc1

Business Unit: pabu2cc1 | Saved Version: 2 | Published Version: 2

General

Name: Agent - ragent1@pabu2cc1 | Created From: Default Agent Queue Template

Type: Queue | Description:

Is Template?: No Yes

Attributes

Tenant Hierarchy: RochesterPA\VDRPA1\VDRPA1\PABU2\PABU2CTOP1\pabu2cc1 | Tenant Hierarchy ID: HST\022\024\025

System Name: RochesterPA

Security Groups

Status: Active

14.3 Configuring a Routing Plan for an Agent Queue

A Routing Plan is required for the Agent Queue and must reside in the same Business Unit as the Agent. A single Routing Plan can accommodate multiple Agent Queues within the Call Centre..

To create a Routing Plan for an Agent Queue,, proceed as follows

- 1 Create a Routing Plan and assign a Service Address as described in chapter 6, Routing Plans.
- 2 To route to an Agent Queue, use the Agent DDI Queue Routing Step as shown in the following figure:

Mobile21-RouteToAgentDDI

Routing Plan: Mobile21AgentDDI-Agent | Saved Version: 1 | Updated: No

General

Name: Mobile21-RouteToAgentDDI | Business Unit: Mobile21

Type: Agent DDI Queue

Default Next

Default Next Step: Mobile21-RouteToAgentDDI

Events

Name	Follow On Routing Step	Created On
DDI No Agent-RTADQ		8/8/2013 3:19 PM

- 3 Add the Service Address to the Routing Plan. (This is the number that the caller will call.)



Multiple Service Addresses can be added if multiple Agents exist with numbers that cannot be matched by a single address lookup with wildcards. For additional information about Service Addresses, refer to Chapter 6.5, *Creating and Assigning a Service Address*.

14.4 Implementing Voicemail

Voicemail can be implemented by handling the following events on the Route To Agent Routing Step:

- Overflow (Last Agent Log Out)
- Overflow (Time Out)
- QFull (Entry Criteria)
- QFull (No Agents)

The Follow-on Routing Step must be a Voice Mail Routing Step.

If an e-mail address is configured on the User Profile in the Agent Queue section, the voicemail will be delivered to that e-mail address rather than the e-mail address on the Voice Mail Profile.

For more information about the Voice Mail Routing Step, refer to chapter 7.5.20, *Voice Mail*.

14.5 Configuring a User's E-mail Address

If desired, you can set up an e-mail address for a Personal Agent Queue to serve as a secondary means of contact for the user. When a call is directed to an Agent Personal Queue but cannot be delivered to the agent, the e-mail address enables a voicemail message to be recorded and then sent to the Agent.

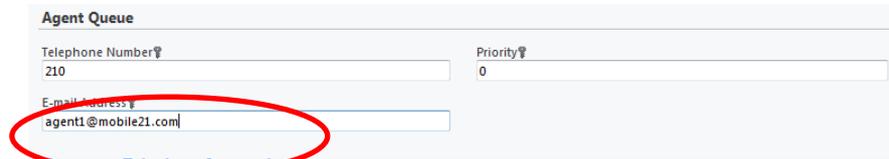


The e-mail address entry is case-sensitive.

To configure a user's e-mail address, proceed as follows

- 1 In the User Profile dialog under Information, click **Queue Assignment**.

-
- 2 In the Agent Queue area, complete the E-mail Address field as shown in the following figure:.



The screenshot shows a form titled "Agent Queue" with three input fields. The "Telephone Number" field contains "210", the "Priority" field contains "0", and the "E-mail Address" field contains "agent1@mobile21.com". The "E-mail Address" field is circled in red.

Telephone Number	Priority	E-mail Address
210	0	agent1@mobile21.com

-
-
- 3 Click **Save & Close** in the ribbon.

15 Computer Requirements and Workstation Configuration

15.1 Overview

This chapter includes the following chapters related to the Agent workstation (SmartStation or Media Bar):

- Computer Requirements and Installation
- Initial SmartStation ClickOnce Configuration
- Workstation Blacklists and External Contact Configuration

15.2 Computer Requirements and Installation

Computers that will be used as Agent workstations must meet certain minimum requirements, as detailed in the SmartStation User Guide (reference 2) or the OASIS (11.5) Media Bar User Guide (reference 3) . The guides also provide configuration instructions and procedures for Agents who will use the SmartStation or Media Bar to service calls.

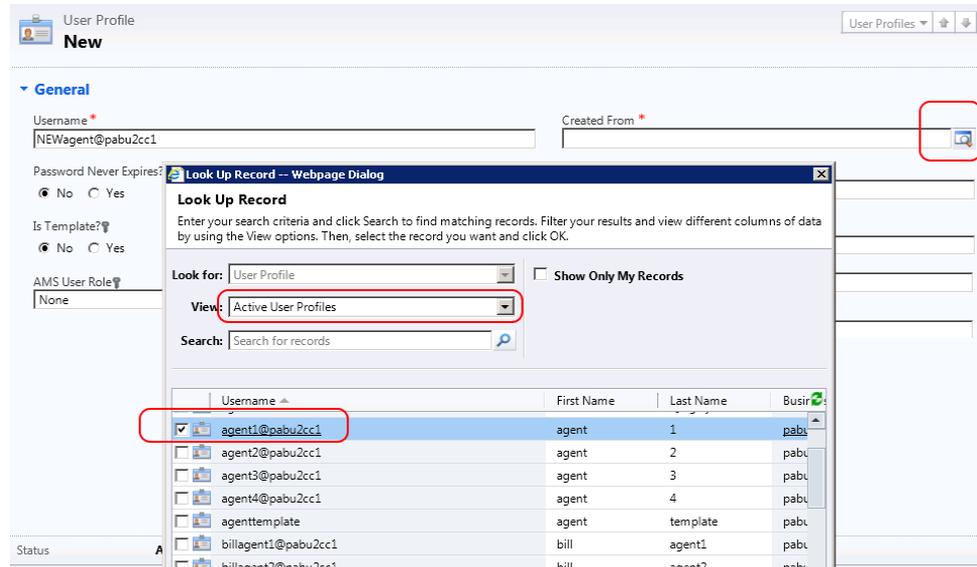
15.3 Initial SmartStation ClickOnce Configuration

ClickOnce is a Microsoft technology that enables VoltDelta to efficiently deploy software and software updates to client workstations within a Business Unit. OASIS Contact Centre applications such as the SmartStation are deployed using the ClickOnce framework.

This chapter provides details on basic configuration in the Management Portal to allow a user to log on to SmartStation ClickOnce and receive a call. For this processing to occur, appropriate Routing Plans must already be configured to route a call into a Queue. In the procedure that follows, that Queue will be assigned to a User (Agent).

This procedure must be performed for each user. However, to expedite the process, you can create the subsequent new user profiles from an existing one, inheriting the properties (including the Queues), by selecting the Created From field on the new User Profile dialog. The Figure below shows the Created From field and the resultant Look Up

Record dialog, where you can select the User whose properties you want to inherit.

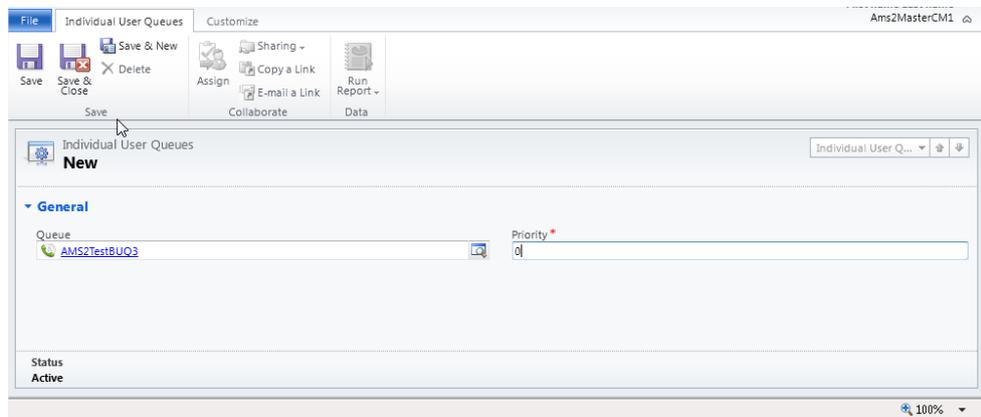


To configure SmartStation ClickOnce to present a call at an Agent workstation, proceed as follows

- 1 Log on to the Management Portal as the Tenant administrator of the Business Unit where the agent's User Profile is configured. Enter the name as *user@domain*
- 2 Edit the Agent's User Profile within the Business Unit the Agent belongs to, as follows:
 - a Click the User Profile to open the details dialog..
 - b Ensure User Location is set to **Remote**. User Location is located in the Computer Telephony Integration section, subsection Session Control.
 - c Set Headset Type to External Voice Device. This should be the default setting. Headset Type is located in the Computer Telephony Integration section, sub-section Voice Device.
 - d Set Voice Digit Identifier to **auto@SIPServer**, where **SIPServer** is the IP address or name of the SIPServer for your system. Voice Digit Identifier is located in the Computer Telephony Integration section, sub-section Voice Device.
 - e Assign the desired Queue to the User as follows:
 - i. Click **Queue Assignment** in the left-hand pane.

This opens the area in the User Profile for configuring Queues for the User.

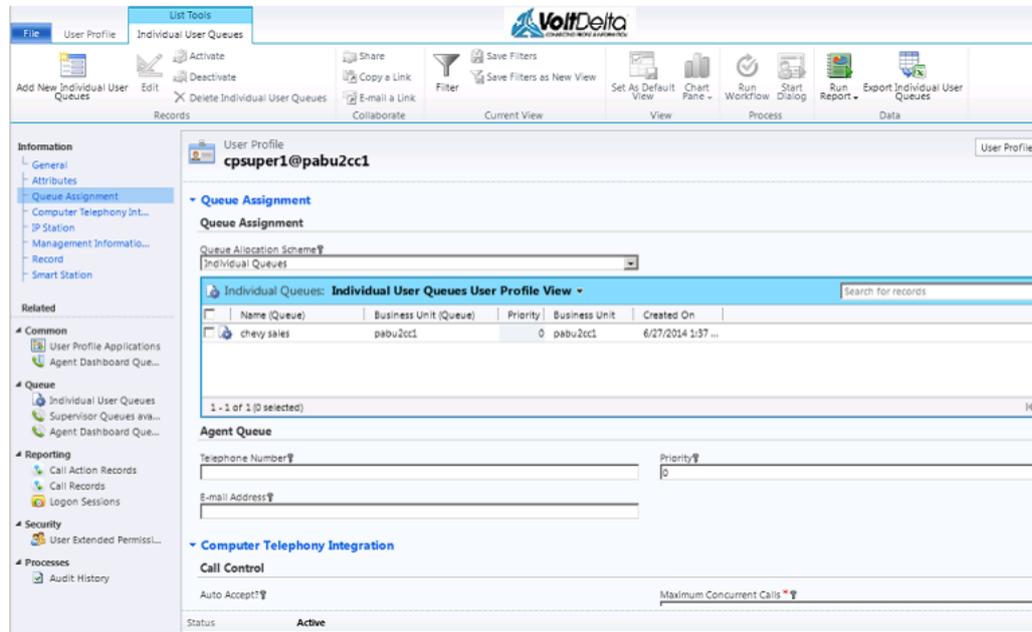
- ii. Ensure Queue Allocation Scheme is set to **Individual Queues**.
- iii. Click on the list box for **Individual Queues**.
- iv. Click **Add New Individual User Queues**.



- v. In the Queue field, enter (or search for) the Queue you added earlier.
- vi. In the Priority field, enter a value of **0**

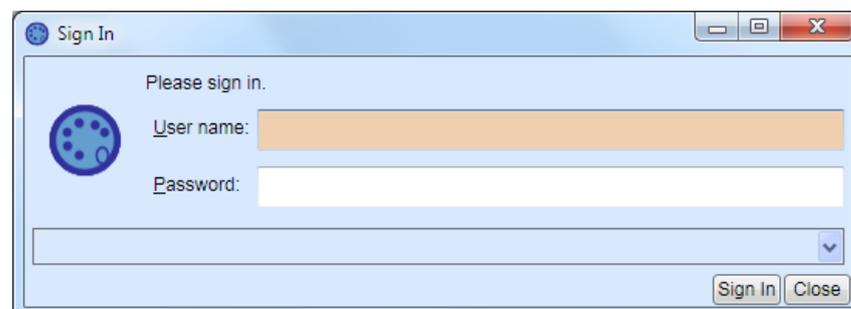
vii. Click **Save & Close**.

The screen should now appear similar to the following



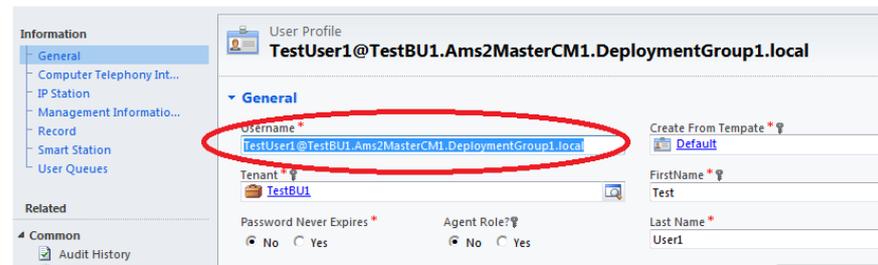
- 3 Launch SmartStation ClickOnce from Internet Explorer by navigating to the URL for your installation of SmartStation ClickOnce.

The Sign In screen is displayed:



- 4 In the SmartStation Username field, enter the full name for the user (as displayed in the User Profile details).

The following figure shows a user's full name in the User Profile dialog:



- 5 Enter the user's password, and then click **Sign In**.
- 6 After the user is successfully logged on, select **Ready** to allow calls to be serviced at the client position

15.4 Workstation Blacklists and External Contact Configuration

The Management Portal enables you to configure a set of Transfer Target numbers (External contacts) and Blacklist rules, which can be published for each Business Unit (tenant). The Business Unit usually is at the Contact Centre level.



Blacklist Rules are applicable to the SmartStation only, and do not apply to the Media Bar.

The Management Portal uses one file for the Transfer Target numbers and a second file for the Blacklist rules, both of which are published to the SmartStation. If no configuration has been created for a Business Unit, SmartStation uses default values for both lists. To correctly process a Business-Unit-specific configuration, both files must be published.

To ensure that both files are always published, the Management Portal provides a parent entity for the Transfer Target and Blacklist entities. This parent entity needs to be published and takes care of delivering both files, even if only one of the two sets has been configured..

15.4.1 Configuring the Parent Entity for SmartStation

A "SmartStation Configuration" is used for both SmartStation and Media Bar workstation types.



You can configure only one SmartStation Configuration with one set of external contacts and one blacklist per Business Unit.

To Create a SmartStation Configuration record, proceed as follows:

- 1 If desired, create generic Blacklist Rules as described in chapter 15.4.3.5, *Creating a Generic Blacklist Rule*.
- 2 In the Management Portal2 navigation pane, select **Business Unit Management** → **SmartStation Configuration**.

A list of active SmartStation Configuration records, if it exists

- 3 Create a new SmartStation Configuration record if it does not already exist

Blacklist	Saved Version	Published Version	Updated	No
External Contacts	Saved Version	Published Version	Updated	No

General

Name* Business Unit*

External Contact Configuration Blacklist Configuration

- 4 Enter a name for the configuration.
- 5 Select the business unit that owns the configuration. The business unit should be at Contact Centre level.
- 6 Click **Save** to store the configuration record.

Blacklist	Saved Version	1	Published Version	Updated	No
External Contacts	Saved Version	1	Published Version	Updated	No

General

Name* Business Unit

External Contact Configuration Blacklist Configuration



When the configuration record is saved, a default External Contact Configuration and a default Blacklist Configuration—both with empty values—are created. If an External Contact Configuration or Blacklist Configuration already exists in the Business Unit the existing configuration is assigned to the parent entity instead.

- 7 Set up the External Contact Configuration if desired, as follows.

- a Click on the value in of External Contact Configuration.



Note that only one External Contact Configuration per Business Unit is allowed.

- b Continue with chapter 15.4.2, Configuring External contacts.

- 8 Set-up the Blacklist Configuration if desired, as follows.

- a Click on the value in of Blacklist Configuration.



Note that only one Blacklist Configuration per Business Unit is allowed.

- b Continue with chapter 15.4.3, Configuring a Blacklist.

- 9 Click **Save** in the ribbon to save the Parent Entity SmartStation Configuration

- 10 Click **Publish** in the ribbon to publish the Parent Entity SmartStation Configuration:



Note: The following conditions must be met in the SmartStation Configuration dialog before the configuration can be published; otherwise the Publish button is dimmed (grayed).

- The Saved Version of either the Blacklist or the External Contacts must exceed the corresponding Published Version
- The Updated flag must be No. This flag should automatically be reset to Yes whenever changes to any of the configuration entities are saved. In case of doubt, press **F5** to refresh the display

The software generates the xml configuration files (which are attached to the configuration record) and publication records for the configuration files (thus scheduling the files to be pushed to the respective servers).

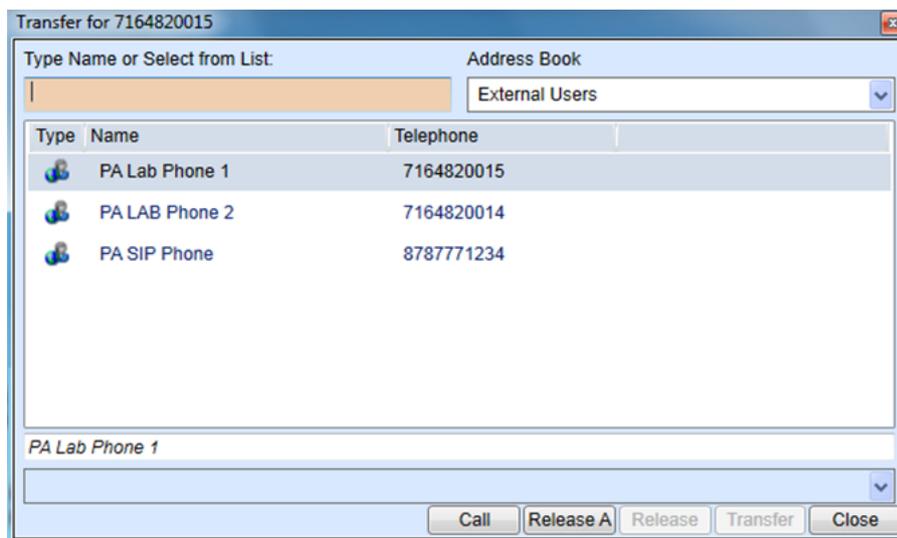
- 11 Close the form when you are finished.

15.4.2 Configuring External contacts

When a workstation Agent User transfers a call or performs a consultation, External Contacts are presented in the External Address Book of the Call Transfer dialog as a drop-down selection list. Each External Contact in this list consists of a telephone number paired with

descriptive text (such as a contact name). When the Agent selects a descriptive text, an external connection is initiated with the corresponding telephone number.

The Figure below shows an example External Address Book as it appears on the SmartStation (the Media Bar is similar).



You can create only one Contact Configuration for a Business Unit.

Before configuring external contacts, make sure that you have configured a Parent Entity, as described in Chapter 15.4.1 Configuring the Parent Entity for SmartStation.

To Configure the external contacts, proceed as follows (similar procedure for Media Bar):

- 1 Display the SmartStation Contact Configuration dialog if it is not already visible. To do so, display the SmartStation Configuration and then click the value in the External Contact Configuration field

- 2 In the Name field of the SmartStation Contact Configuration dialog, edit the name for the configuration.

The screenshot shows the 'SmartStation Configuration' dialog for 'YPI SST config CC-1'. It includes a table with columns for 'Blacklist', 'External Contacts', 'Saved Version', and 'Published Version'. Below the table, the 'General' section contains fields for 'Name' (YPI SST config CC-1), 'Business Unit' (YpiContactCentreA-in), 'External Contact Configuration' (Default External Contact Configuration), and 'Blacklist Configuration' (Default Blacklist).

- 3 Leave the business unit field value unchanged.
- 4 Click **Save** to store the configuration record.
- 5 If you wish to categorize contacts, create contact categories for your configuration record. The contact categories are displayed as address book groupings on the SmartStation display:
 - a Select the **Contact Categories** grid
 - b Select **Add New SmartStation Contact Category** from the ribbon.

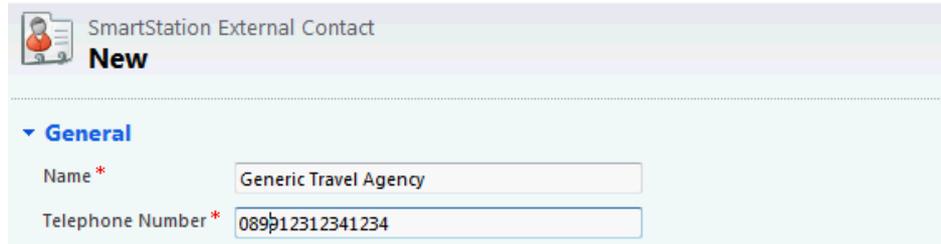
The New SmartStation Contact Category dialog is displayed

The screenshot shows the 'New SmartStation Contact Category' dialog. The 'General' section contains fields for 'Name' (TRAV), 'Display Name' (Travel Agencies), and 'Contact Configuration' (Sigrun's test contact configuration).

- c In the Name field, enter a short identifier for the category
 - d In the Display Name field, enter the name for the category as it will appear in the Call Transfer dialog. The Contact Configuration field will already be filled with the Configuration record to which you are adding the contact category.
 - e Click **Save & Close**.
- 6 Add external contacts to the configuration, as follows::
 - a Return to the configuration form (that is, the tab or window).
 - b Select the **External Contacts** grid.

c Select **Add New SmartStation External Contact** from the ribbon.

The New SmartStation External Contact dialog is displayed



SmartStation External Contact
New

▼ **General**

Name *

Telephone Number *

d Enter the Name and the Telephone Number of the external contact.

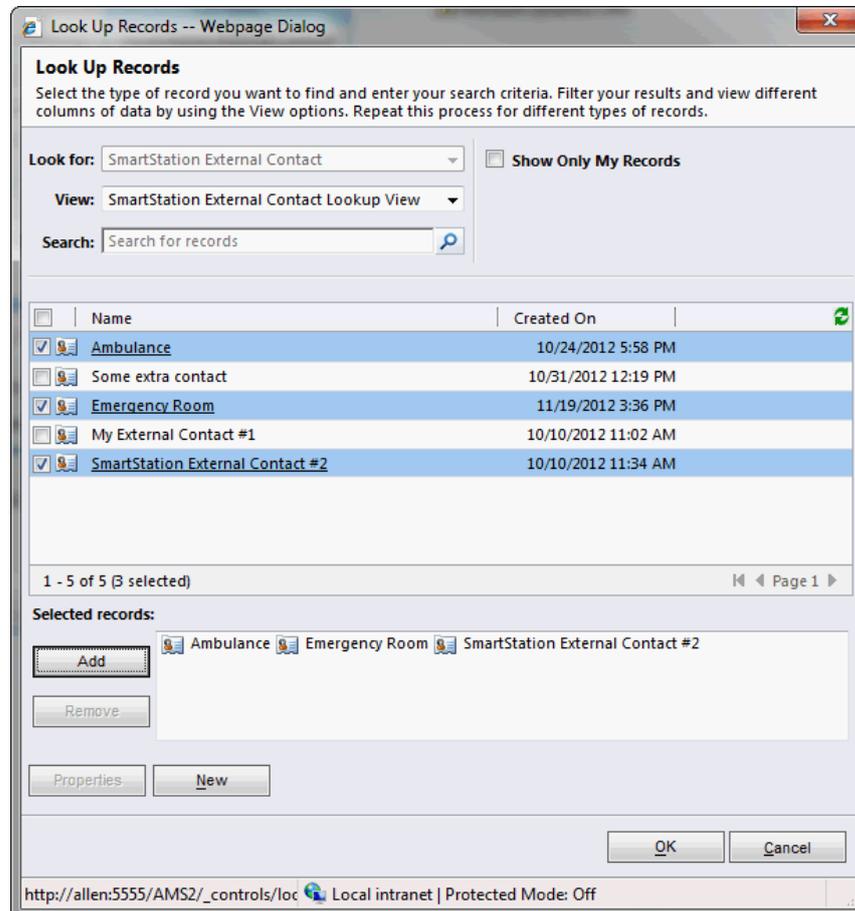
e Click **Save & Close** to save your changes.

7 Assign a contact to a Contact Category, as follows:

a Click the name of the **Contact Category** in the Contact Categories sub-grid of the Contact Configuration form to open a Contact Category record.

b Select the **External Contacts** grid.

- c Select **Add Existing SmartStation External Contact** from the ribbon



- d To add the desired contacts to this category, select the corresponding check box(es), then click **Add**
- e Click **OK** to confirm the addition of external contacts
- f Click **Save & Close** in the Contact Category form
- 8 Optionally, to assign a Contact Category to a contact (versus assigning a contact to a Contact Category), do the following:
- Click the name of the contact in the External Contacts grid.
 - In the properties dialog for the contact, click the Categories grid, and then click **Add Existing SmartStation Contact Category** in the ribbon.
 - In the Look Up Records dialog, select the check box next to the desired Contact Category
 - Click **OK**, then click **Save & Close**

- 9 Click **Save & Close** in the ribbon to close the External Contact Configuration.
- 10 Continue with step 8 in Chapter 15.4.1, Configuring the Parent Entity for SmartStation.

15.4.3 Configuring a Blacklist



Blacklists are lists with barred numbers for outbound calls. Note that VoltDelta recommends handling such numbers through **Multi Media Routing → Call Barring Lists** instead.

A Blacklist Configuration contains a list of telephone numbers that are blocked (“blacklisted”) from receiving certain Computer Telephony Integration (CTI) services. A separate list can be defined for each of the available CTI services.

To enable blacklist functionality, you must first create a *SmartStation Configuration* for your Business Unit. The SmartStation Configuration associates your Business Unit with a *Blacklist Configuration* (and an External Contact Configuration), which represents the overall blacklist plan for your Business Unit. Although you can create multiple Blacklist Configurations, only one can be selected for use at any given time.

A Blacklist Configuration contains all Services for which blacklists have been defined through the use of *Blacklist Rule Sets*, individual *Service Rules*, or a combination of both.

A *Blacklist Rule* is a generic entity that contains a specific number or a string for which special processing is to be applied. A Service Rule is built around a Blacklist Rule and contains additional logic for allowing or disallowing the Blacklist Rule, and the order in which to execute the Service Rule. One or more Service Rules can be organized into a Blacklist Rule Set, which enables the Service Rules to be conveniently reused when defining blacklists for various CTI services.



Blacklists are not applicable for Media Bar workstations.

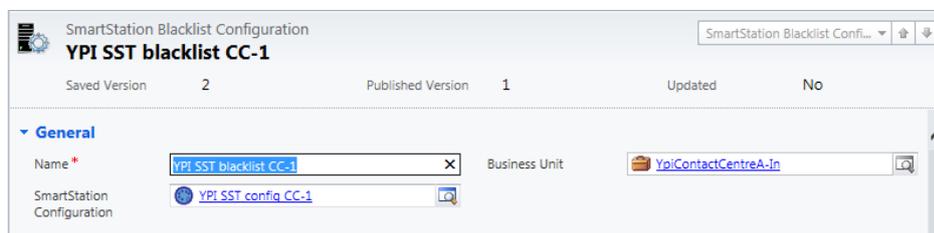
15.4.3.1 Creating the Blacklist Configuration Record

Before configuring blacklists, make sure that you have configured a Parent Entity, as described in Chapter 15.4.1, Configuring the Parent Entity for SmartStation.

A blacklist configuration record is used to group the relevant blacklist rules.

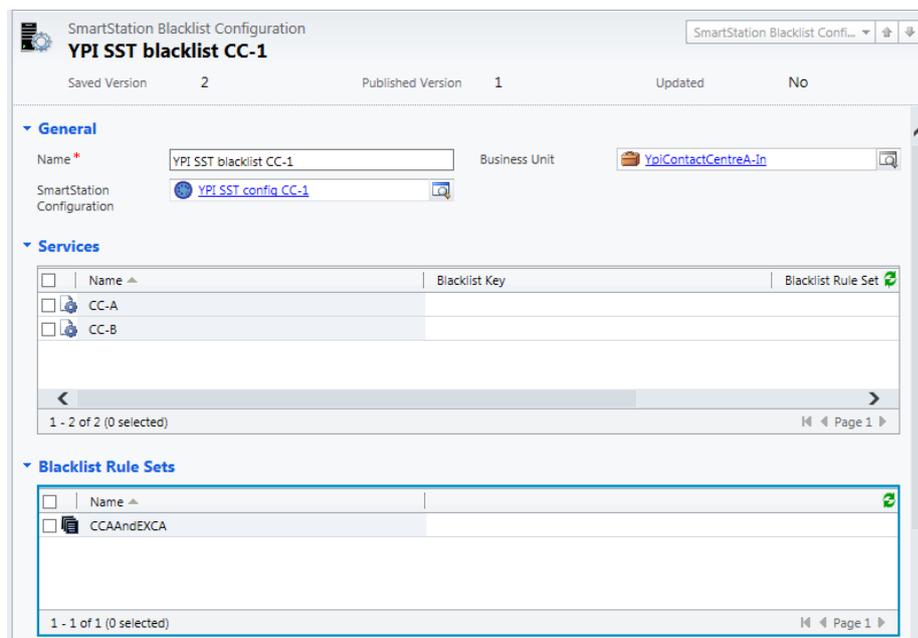
To Create the blacklist configuration record as follows, proceed as follows:

- 1 Display the SmartStation Blacklist Configuration dialog if it not already visible. To do so, open the SmartStation Configuration and then click the value in the Blacklist configuration field



- 2 In the Name field of the SmartStation Blacklist Configuration dialog, edit the name for the configuration.
- 3 Click **Save** in the ribbon to store the form.

You can now add Services and Blacklist Rule Sets to the blacklist configuration record, as described in the sections that follow.



15.4.3.2 Adding Services

The Services table in the form lists the CTI services that need blacklist rules. To add services. A separate list can be defined for the available CTI services:

The Table below defines these CTI services.

Service Name	Function
EXC-A	External consultation (set up destination party connection), depending on caller's number. Also applies to new calls initiated from within the SmartStation.
EXC-B	External consultation (set up destination party connection), depending on called destination number.

To add services to the SmartStation blacklist configuration, proceed as follows:

- 1 Display the desired SmartStation Blacklist Configuration dialog if it is not already displayed
- 2 In the SmartStation Blacklist Configuration dialog, select the Services grid and then click **Add New SmartStation Service** in the ribbon.

The New SmartStation Service dialog is displayed

SmartStation Service
New

▼ **General**

Name *

Blacklist Key

Blacklist Rule Set

▼ **Service Rules**

<input type="checkbox"/>	Rule Order	Name	Rule Type	SmartStation Blacklist Rule

- 3 In the Name field, enter the name of the CTI service (for example, EXC-A).



Allowed service names are listed in the Table above.

When specifying a name, do not enter the apostrophe character (').

4 Optionally, enter a desired Blacklist Key.

Multiple service elements can be defined for a single service. In that case, each element must be distinguished by adding a Blacklist Key. SmartStation evaluates the string configured in the OASIS call profiling property, "Black List Key," and selects the services whose Blacklist Key attributes match the "Black List Key" value.



A System Host Administrator must configure the "Black List Key" property.

5 Click **Save** to store the form.

6 You can choose either of the following strategies to associate rules with services:

- Define the set of rules for each service independently (refer to chapter 15.4.3.3, Adding Individual rules to a service).
- Define Blacklist Rule Sets which can be referenced by different SmartStation service records to define the blacklist rules for the services (refer to chapter 15.4.3.4, Creating Reusable Rule Sets).

15.4.3.3 Adding Individual rules to a service

To add individual rules to the service, proceed as follows:

1 Display the relevant SmartStation Service dialog if it is not already displayed.

- 2 In the SmartStation Service dialog, select the **Service Rules** grid and click **Add New SmartStation Service Rule** in the ribbon

The New SmartStation Service Rule dialog is displayed

The screenshot shows the 'SmartStation Service Rule' dialog box with the 'New' tab selected. The 'General' section is expanded, showing the following fields:

- Name ***: Deny International numbers
- Rule Order ***: 1
- Rule Type ***: Deny
- SmartStation Blacklist Rule ***: All international numbers
- SmartStation Service**: CC-A
- Blacklist Rule Set**: (empty)

- 3 In the Name field, enter a meaningful name for the rule.
- 4 In the Rule Order field, enter a unique Rule Order number (positive integer) to specify the relative priority of this rule.



The allowed values are 1 through 32768.

Lower numbers signify higher priority (for example, 1 is always the highest possible priority). Rules are parsed according to this Rule Order. The first matching rule is used

- 5 In the Rule Type field, select either **Allow** or **Deny**
- 6 Do one of the following:
 - Select an existing SmartStation Blacklist Rule by clicking the icon to the right of the field.
 - Create a new Blacklist Rule as described in chapter 15.4.3.5, Creating a Generic Blacklist Rule



The Blacklist Rule Set field must be left blank.

The SmartStation Service field should already be populated

- 7 Repeatedly click **Save & Close** until you have closed the Blacklist Configuration dialog
- 8 Continue with step 9 in chapter 15.4.1, Configuring the Parent Entity for SmartStation.

15.4.3.4 Creating Reusable Rule Sets

If a set of rules is needed more than once, you can create a reusable set of rules,, proceed as follows:

- 1 Open the desired SmartStation Blacklist Configuration dialog if it is not already displayed.
- 2 In the SmartStation Blacklist Configuration dialog, select the **SmartStation Blacklist Rule Set** grid and then click **Add New SmartStation Blacklist Rule Set** in the ribbon

The New SmartStation Blacklist Rule Set dialog is displayed

- 3 In the Name field, enter a meaningful name for the rule set.
- 4 Click **Save** to store the form.
- 5 Add rules to the rule set, as follows

- a Select the **Rules** grid and then click **Add New SmartStation Service Rule** in the ribbon.

The New SmartStation Service Rule dialog is displayed

- b In the Name field, enter a meaningful name for the rule.
- c Enter a Rule Order number (positive integer) to specify the relative priority of this rule. (Rules are parsed according to this Rule Order; the first matching rule is used)
- d Select the Rule Type (**Allow** or **Deny**)
- e Select the SmartStation Blacklist Rule to be used. (To define a new blacklist rule, refer to chapter 15.4.3.5, Creating a Generic Blacklist Rule)



The Blacklist Rule Set field must be left blank.

The SmartStation Service field should already be populated

- 6 Click **Save & Close** in the ribbon until the SmartStation Configuration dialog is redisplayed
- 7 Continue with step 9 in 15.4.1, Configuring the Parent Entity for SmartStation

15.4.3.5 Creating a Generic Blacklist Rule

While generic Blacklist Rules facilitate the Blacklist Configuration, they are *not* mandatory. Tenant-specific Blacklist Rules can also be configured by the System Host Administrator for the Tenant level.



Generic rules must be configured by an administrator of the Management Portal System Host. Parent Tenant or Tenant administrators cannot configure generic Blacklist Rules.

Furthermore, you must be familiar with Regular Expressions (pattern matching syntax) when configuring the Blacklist Rules

Typically, generic Blacklist Rules should be created before any Blacklist Configuration records are created.

A Creating Personal Views

A.1 Overview

This appendix describes how to create Personal Views for most situations where lists or tables are displayed in the Management Portal. A Personal View provides you with alternatives to the system default views of the Management Portal data:

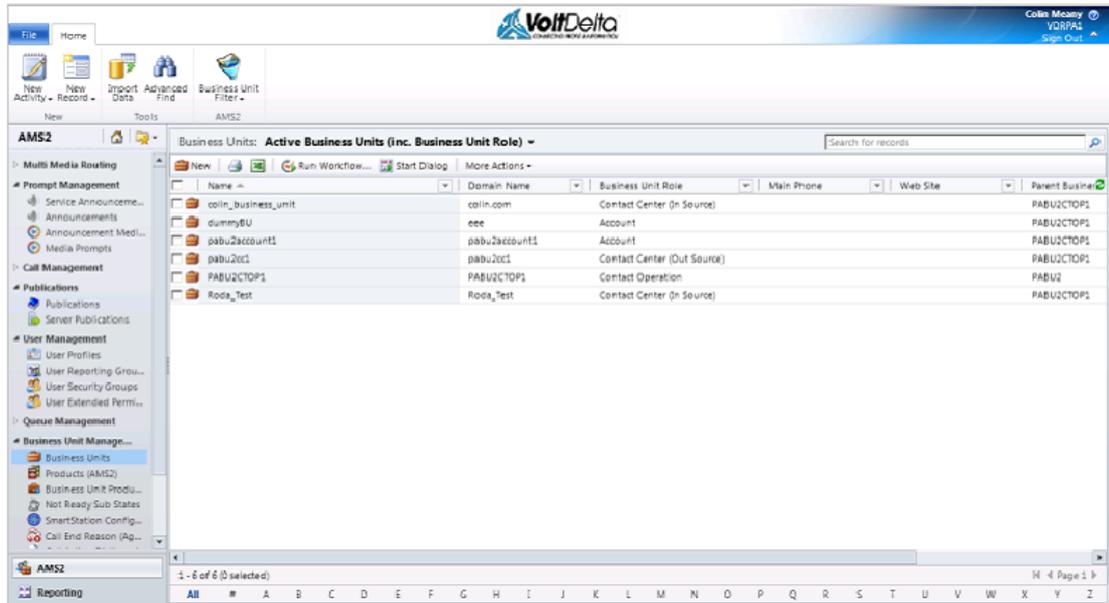
For example, when listing Business Units, the default view resembles the view shown in the Figure below:

Name	Domain Name	Main Phone	Web Site	Parent Business	Business Unit Role
copln_business_unit	copln.com			PABU2CTOP1	CERTA
dummyBU	etc			PABU2CTOP1	ACCU
pabu2account	pabu2account			PABU2CTOP1	ACCU
pabu2tel	pabu2tel			PABU2CTOP1	CERTA
pabu2ctoP1	PABU2CTOP1			PABU2	CERTA
pabu2tel	Pabu_Tel			PABU2CTOP1	CERTA

This view shows the Active Business Units and displays a list of Business Units with the columns Name, Main Phone, Web Site, and so on.

However, if desired, you could include the Business Unit Role in this list of Business Units and their properties. To do so, you need to create a Personal

View that includes a new column. The Figure below shows an example of such a view:



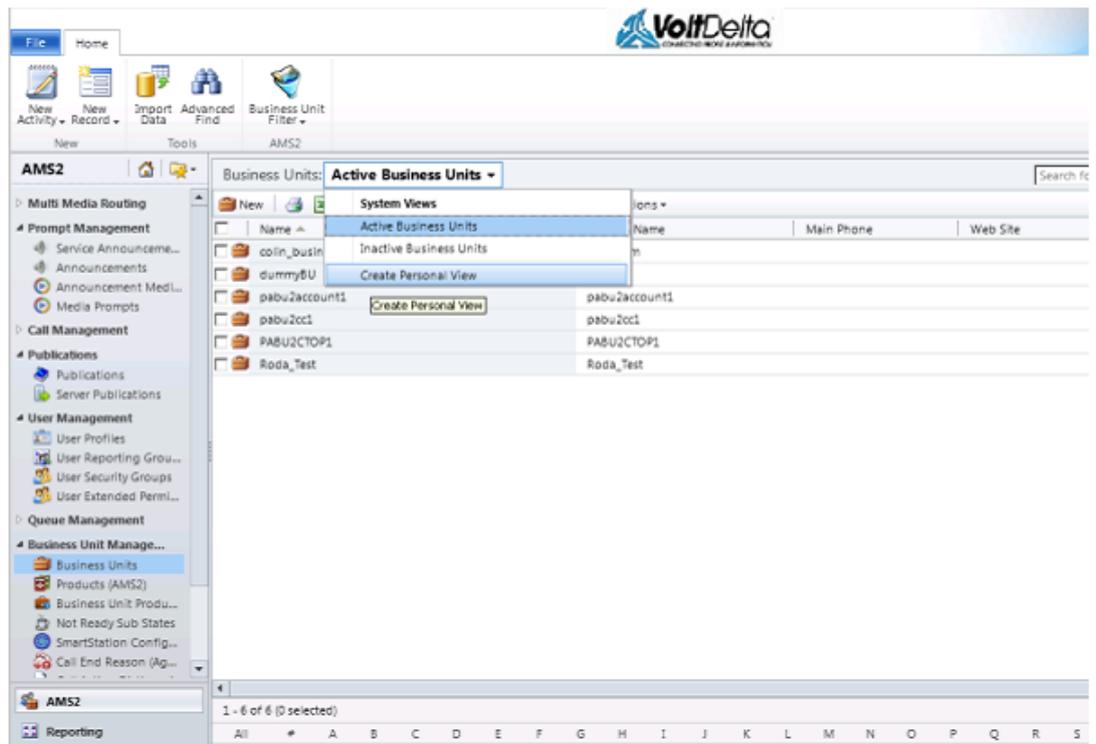
A.2 Example Procedure

As an example, the following procedure describes how to include the Business Unit Role type in the Business Units display:

- 1 In the Management Portal navigation pane, select **Business Unit Management** → **Business Units**.

The default list of active Business Units is displayed

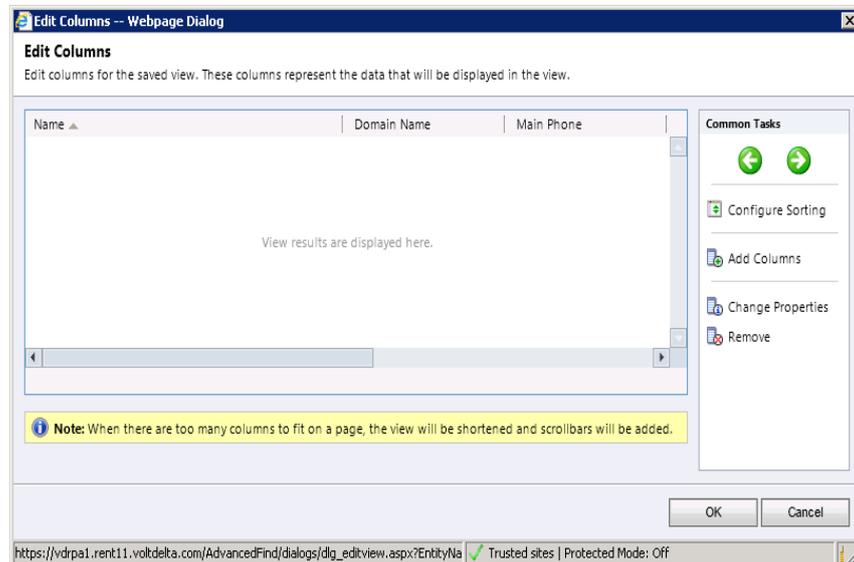
- 2 Click **Active Business Units** and select **Create Personal View**, as shown in the following figure::



The Advanced Find dialog is displayed. This dialog lets you change the way the view filters the data to be displayed

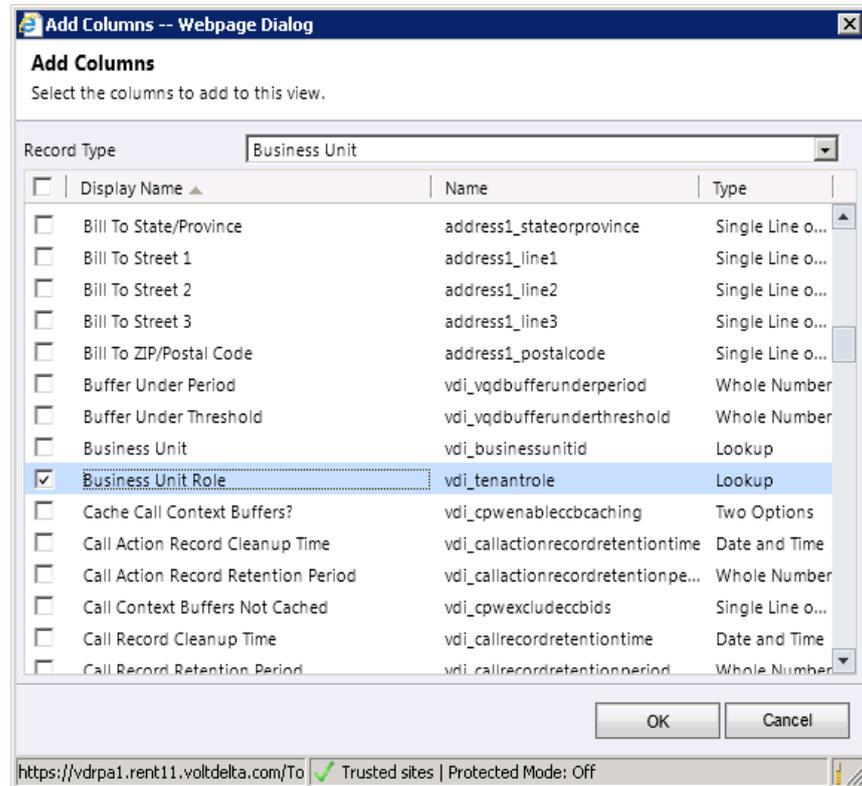


- 3 Click **Edit Columns** to select the desired columns to display in the list.
The Edit Columns dialog is displayed



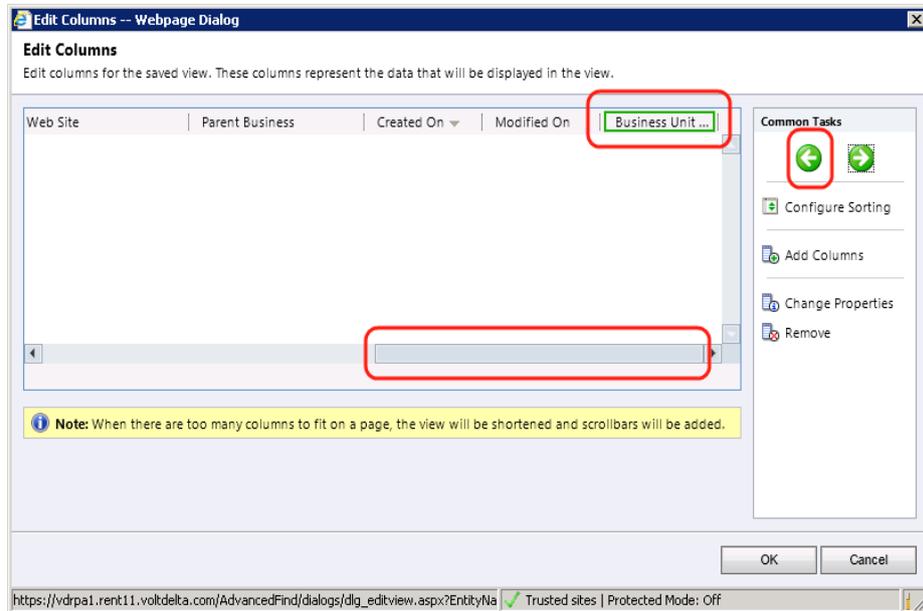
- 4 In the Common Tasks pane, click **Add Columns**.

The Add Columns dialog is displayed:



- 5 Scroll down through the list and select the row with the Display Name **Business Unit Role**.
- 6 Click **OK** to confirm your selection and return to the Edit Columns dialog.

- 7 Use the horizontal scroll bar to scroll the list of columns to the far right, since the new column is added as the right-most column in the list. Click the left/right arrow buttons to position the column as desired in the display

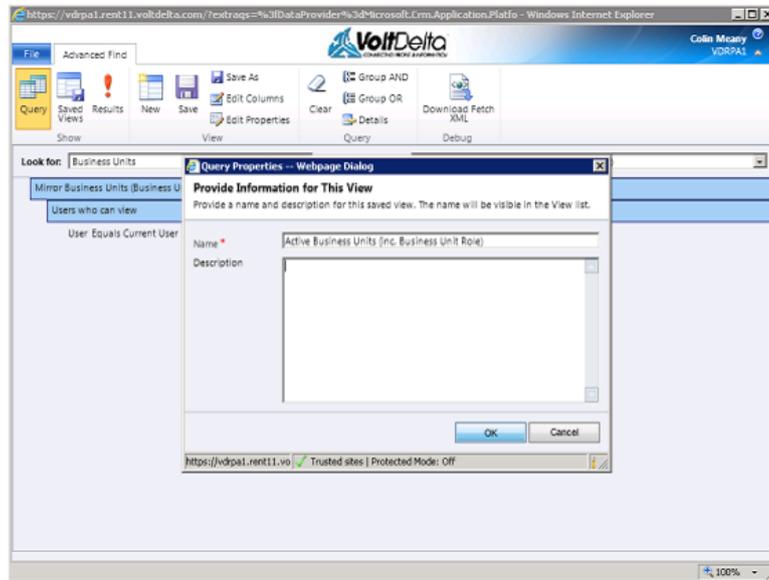


- 8 Click **OK** to confirm the adjustment and return to the Advanced Find dialog.

- 9 Click **Save As**, and then enter a meaningful name for the Personal View, for example, Active Business Units (inc. Business Unit Role).



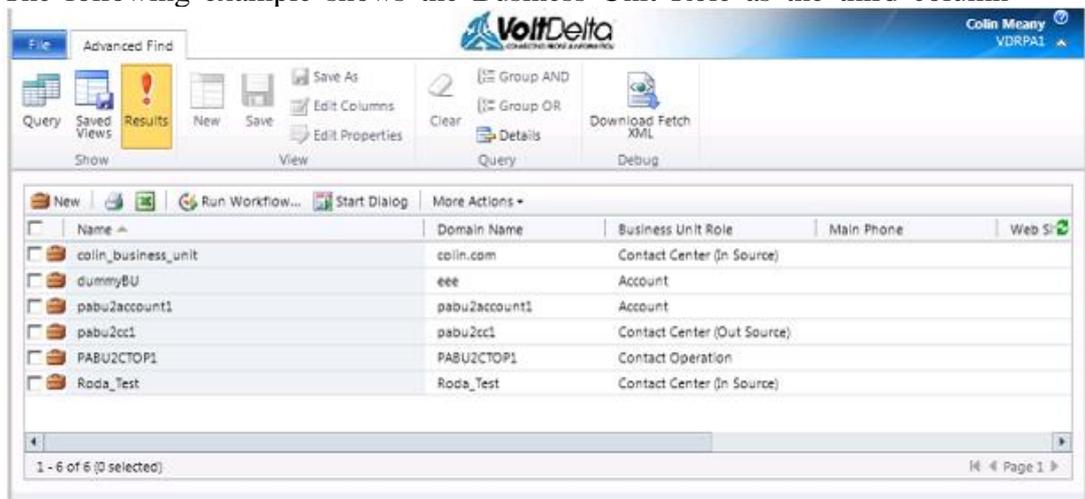
When specifying a name, do not enter the apostrophe character (').



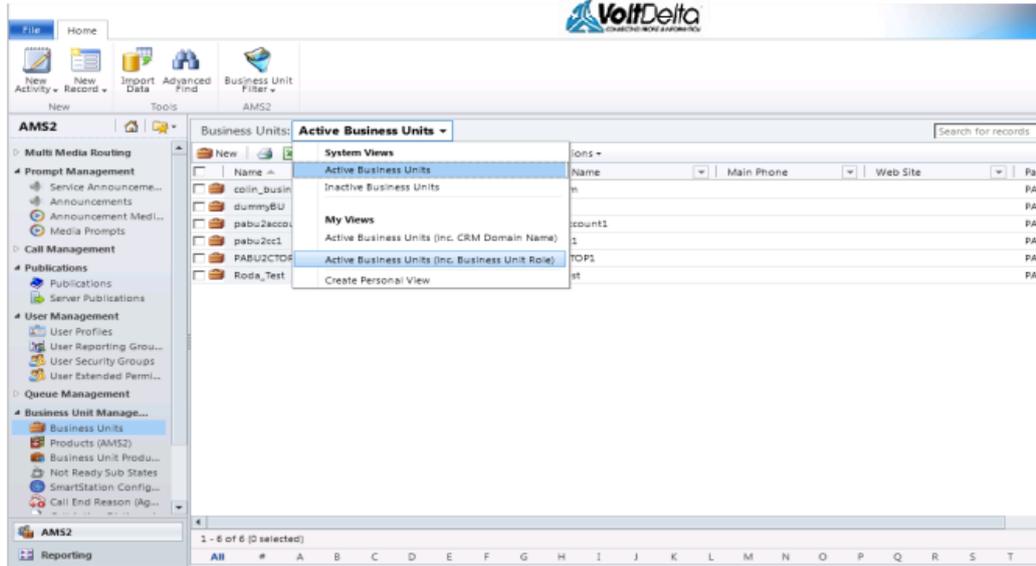
- 10 Click **OK**.

- 11 Click **Results** in the ribbon to see how your list is now displayed.

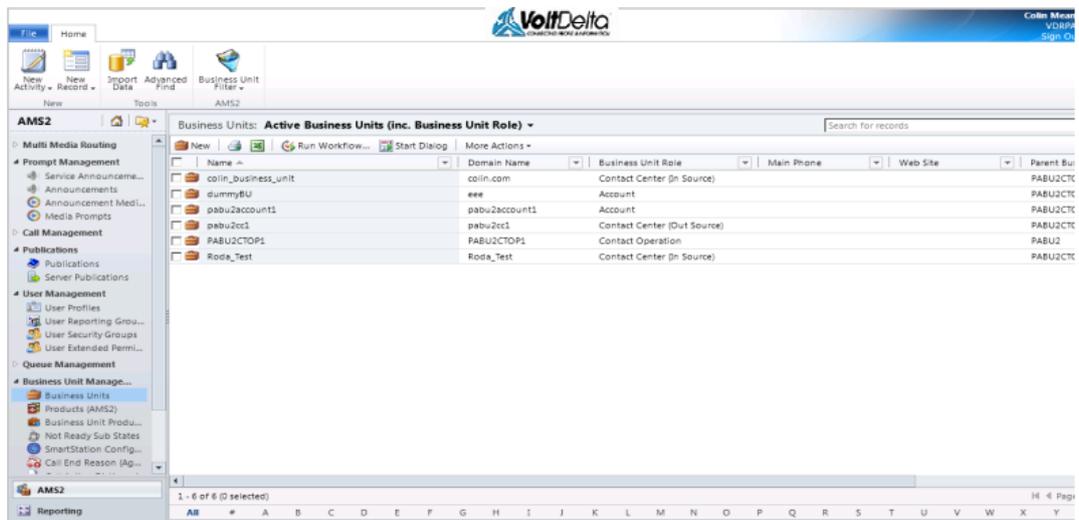
The following example shows the Business Unit Role as the third column



12 Close the Advanced Find dialog, and then select your new view from the list of views, as shown in the following figure:



The new view is displayed, showing the Business Unit Role information for each Business Unit in the third column:



B Managing Client Computers and Service Providers

B.1 Overview

This appendix contains the following chapters:

- Managing Client Computers
- Managing Service Providers

B.2 Managing Client Computers

To function correctly, the Management Portal reporting subsystem requires placeholder values to be established for Client Computers and Client Computer Reporting Groups. Once these entities are created and shared, no further user involvement with Client Computers is typically required.

This chapter includes the following topics:

- Client Computer Overview
- Creating Client Computer Record
- Creating a Client Computer Reporting Group



Once the Management Portal has been set up for your Business Unit, you typically will not need to perform any tasks with Client Computers; these topics are included for completeness of information only.

B.2.1 Client Computer Overview

For computers that are located in a Call Centre, specific configuration tasks are involved that do not apply to remote computers. For each computer at a Call Centre, you must create a Client Computer record for the Management Portal. Client Computer records can be grouped into Client Computer Reporting Groups to represent actual computer groups in use at the call Centre. To enable reporting and analysis, properties for these Client Computer Reporting Groups can be shared with other Client Computer Reporting Groups whose members are responsible for generating reports

B.2.1.1 Client Computer Records

A Client Computer record is required only if the User Location setting of a User Profile is set to “Call Centre,” as shown in the Figure below. Client

Computers are not required if the User Location setting is configured as **Remote**:



B.2.1.2 Creating Client Computer Groups

Client Computer Reporting Groups contain one or more Client Computer records to facilitate reporting functionality.

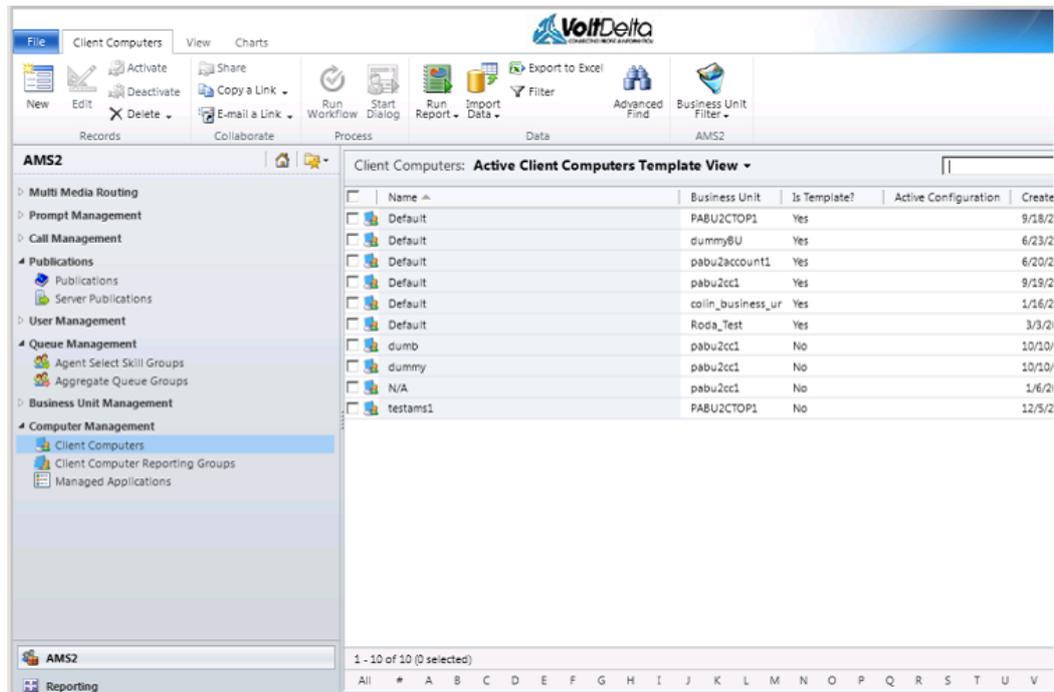
Note the following about Client computer Reporting Groups:

- Client Computer Groups are used to aggregate Client Computers for reporting purposes (Dynamic or Historic).
- Client Computers can belong to more than one Client Computer Reporting Group.
- A Client Computer Reporting Group can contain only Client Computers from the same Business Unit to which the group belongs.

B.2.2 Creating Client Computer Record

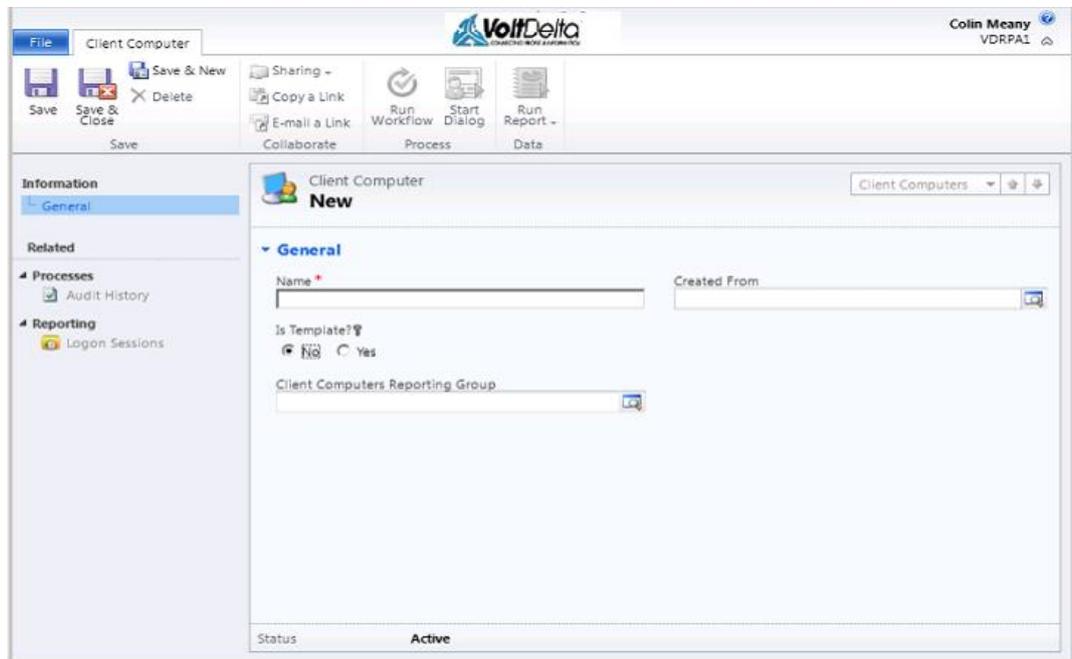
To create a Client Computer record, proceed as follows.

- 1 In the Management Portal navigation pane, select Computer Management → Client Computers



2 Click **New** in the ribbon

The dialog to create a Client Computer is displayed



The screenshot shows the 'Client Computer' dialog box in the VoIPDelta application. The 'File' ribbon is active, showing options like 'Save', 'Save & Close', 'Delete', 'Share', 'Copy a Link', 'E-mail a Link', 'Run Workflow', 'Start Dialog', and 'Run Report'. The 'Information' pane on the left shows 'General' selected. The main area is titled 'Client Computer New' and contains the following fields:

- Name ***: A text input field.
- Created From**: A dropdown menu.
- Is Template?**: Radio buttons for 'No' (selected) and 'Yes'.
- Client Computers Reporting Group**: A dropdown menu.

At the bottom, the status is shown as 'Active'.

- 3** In the Name field, enter the name of the computer that will access the Management Portal. When specifying a name, do not enter the apostrophe character (').

- Click the button next to the Created From field to choose a template



- Client Computer records must always be created from a template for the required Business Unit.
- If templates from multiple Business Units appear (depending on your user permissions), click the Business Units column header to sort the list according to Business Unit name. This will make it easier to find the required template

The Look Up Record dialog is displayed

Name	Business Unit	Is Template?	Active
Default	PABU2CTOP1	Yes	Yes
Default	dummyBU	Yes	Yes
Default	pabu2account1	Yes	Yes
Default	pabu2cc1	Yes	Yes
Default	colin_business_ur	Yes	Yes
Default	Roda_Test	Yes	Yes
dumb	pabu2cc1	No	Yes
dummy	pabu2cc1	No	Yes
N/A	pabu2cc1	No	Yes
testams1	PABU2CTOP1	No	Yes

- Select the Default for your required Business Unit, and then click **OK**
You are returned to the Client Computer dialog
- Click **Save**.
All the properties for the Client Computer appear in the dialog
- Click **Save & Close** to close the dialog with all the Client Computer properties set to default values

B.2.3 Creating a Client Computer Reporting Group

To create a Client Computer Reporting Group, proceed as follows:

1 In the Management Portal navigation pane, select **Computer Management** → **Client Computer Reporting Groups**.

2 Click **New** in the ribbon

The Create Client Computer Reporting Group dialog is displayed.

The screenshot shows the 'Client Computer Reporting Group' dialog box. The ribbon includes 'File', 'Save & New', 'Sharing', 'Collaborate', 'Process', and 'Data'. The 'General' tab is active, showing fields for 'Name', 'Business Unit', and 'Parent Client Computer Reporting Group'. Below these are two empty tables with columns for 'Name', 'Business Unit', and 'Created On'. The status is 'Active'.

3 In the Name field, enter the name of the new Client Computer Reporting Group.



The maximum allowed length is 28 characters. When specifying a name, do not enter the apostrophe character (')..

4 In the Business Unit field, select the Business Unit for the new Client Computer Reporting Group.

5 Optionally, select the Parent Client Computer Reporting Group (subset group).

6 Click **Save & Close** in the ribbon to save the new Client Computer Reporting Group and close the dialog.

7 After you have created the Client Computer Reporting Group, share the group as necessary with the required Users or Business Units. Refer to Chapter 4, [Sharing Entities](#) for details.

B.3 Managing Service Providers

This chapter contains the following topics:

- Creating a Service Provider
- Publishing a Service Provider

B.3.1 Creating a Service Provider

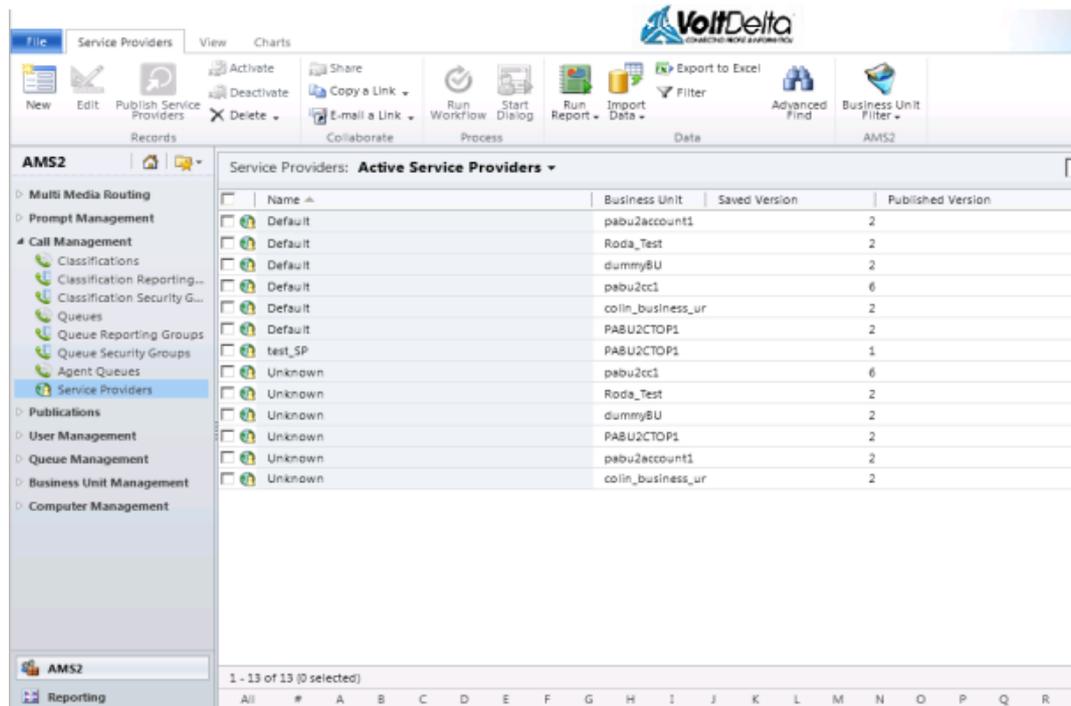
When a Business Unit is created, two Service Providers are automatically created and published: Default and Unknown.

For a simple configuration, the Default Service Provider will normally be used so it may not be necessary to create further Service Providers.

If additional Service Providers are required, proceed as follows:

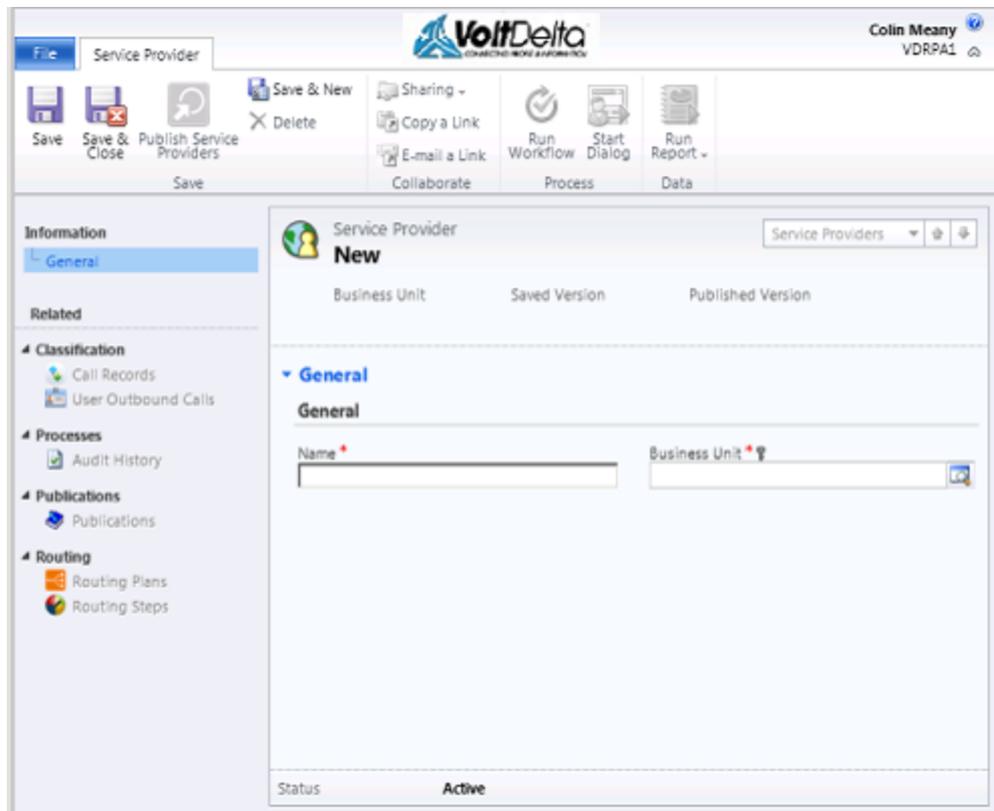
- 1 In the Management Portal navigation pane, select **Call Management → Service Providers**.

The New Service Provider dialog is displayed



- 2 Click **New** in the ribbon.

The New Service Provider dialog is displayed.



- 3 In the Name field, enter a name for the new Service Provider.

- 4 Click the button next to the Business Unit field.

The Look Up Record dialog is displayed for you to select the Business Unit.

Name	Domain Name	Business Unit Role	
<input type="checkbox"/> colin_business_unit	colin.com	Contact Center (In Sou	PA
<input type="checkbox"/> dummyBU	eee	Account	PA
<input type="checkbox"/> pabu2account1	pabu2account1	Account	PA
<input type="checkbox"/> pabu2cc1	pabu2cc1	Contact Center (Out Sc	PA
<input checked="" type="checkbox"/> PABU2CTOP1	PABU2CTOP1	Contact Operation	PA
<input type="checkbox"/> Roda_Test	Roda_Test	Contact Center (In Sou	PA



Enter the first few letters of the Business Unit name in the Search field and click the **Search** button to find your Business Unit.

- 5 Select the Business Unit and click **OK**.
You are returned to the Service Provider dialog.
- 6 Click **Save & Close** to close the dialog and save the new Service Provider.



There are currently no properties to set for a Service Provider

- 7 Continue on with chapter B.3.2, [Publishing a Service Provider](#)

B.3.2 Publishing a Service Provider

When a Business Unit is created, two Service Providers are automatically created: Default and Unknown. These Service Providers are published automatically.

C Quota Routing

C.1 Overview

Quota Routing is a feature that allows calls to be pushed to Agents while they are processing other calls. This is particularly useful for non-voice calls (Chat, Email, SMS, etc) where Agents can deal with a number of these calls at a time due to the nature of their interactions with the caller.

Agents can be assigned a quota of calls for each type of call (Voice, Chat, Email, SMS, etc) to allow the calls to be loaded to each agent up to their allocated quotas.

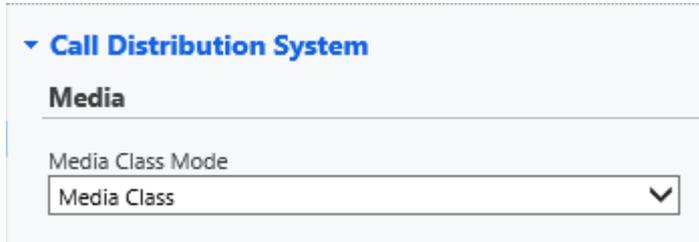
Quota Routing revolves around the media type of the call (Voice, Chat, Email, SMS, etc), and the system allows you to configure Quota Routing based on the Media Type or the Media Class. The Media Class is a group of Media Types allowing you to use a logical collection of Media Types, and simplifying the overall configurations you deal with. The following Media Classes are provided.

Media Class	Media Type(s)
Near Real Time	Chat
Non Real Time	Email Facebook SMS Social Twitter
Real Time	Security Dialler V18 Voice

The following sections take you through the configurations available in the system for Quota Routing, ending up showing you how to configure Agents for this feature.

C.2 Setting Media Class Mode (Business Unit Setting)

In each Business Unit there is a setting *Media Class Mode*.



This is the first setting you should review and configure the way you prefer. It has two values:

1. **Media Class:** Quota Routing configuration will be based on collections of media types. This will allow you to configure Quota Routing for agents based on these collections, which will be shown in the User Profile for the Agent under **Media Channel Quotas**.

Media Channel Quotas: Active Agent Media Channel Quota						
<input type="checkbox"/>	Sequence Number	Media Class	Business Unit	Call Quota	Created On	Modified On
<input type="checkbox"/>	1	Real Time	DemoContactOper	1	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	2	Near Real Time	DemoContactOper	3	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	3	Non Real Time	DemoContactOper	2	08/09/2014 23:43	08/09/2014 23:43

2. **Media Type:** Quota Routing configuration will be based on each media type. This will allow you to configure Quota Routing for agents based on each individual type of media, which will be shown in the User Profile for the Agent under **Media Channel Quotas**.

Media Channel Quotas: Active Agent Media Channel Quota						
<input type="checkbox"/>	Sequence Number	Media Class	Business Unit	Call Quota	Created On	Modified On
<input type="checkbox"/>	1	Voice	DemoContactCentr	1	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	2	SMS	DemoContactCentr	2	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	3	V18 Text	DemoContactCentr	1	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	4	Email	DemoContactCentr	2	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	5	Security Dialler	DemoContactCentr	1	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	6	Chat	DemoContactCentr	3	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	7	Twitter	DemoContactCentr	2	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	8	Facebook	DemoContactCentr	2	08/09/2014 23:43	08/09/2014 23:43
<input type="checkbox"/>	9	Social	DemoContactCentr	2	08/09/2014 23:43	08/09/2014 23:43

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Which *Media Class Mode* you use really comes down to do you wish to configure different quotas for Agents for each individual media type, or by the logical collections of media types.

C.3 Classification Settings

C.3.1 Media Type

The Classification setting *Media Type* determines the type of media allocated to a Classification, and therefore a call.

Note the (display only) Classification setting *Media Class* will be displayed depending on the Business Unit setting *Media Class Mode*. If *Media Class Mode* is set to **Media Class**, then the Media Class is displayed. For example:

The screenshot shows a 'Media' configuration panel. It contains two dropdown menus. The first, labeled 'Media Type', has 'Email' selected. The second, labeled 'Media Class', has 'Non Real Time' selected. There are search icons to the right of each dropdown.

If *Media Class Mode* is set to **Media Type**, then the Media Type is displayed. For example:

The screenshot shows a 'Media' configuration panel. It contains two dropdown menus. The first, labeled 'Media Type', has 'Email' selected. The second, labeled 'Media Class', has 'Email' selected. There are search icons to the right of each dropdown.

C.3.2 Quota Interruption Mode

Determines the Quota Interruption Mode for the Classification, and has these possible values:

Value	Description
Normal	Agents can be presented calls whilst handling a call of this Classification as the Active Call when all other Quota Routing conditions are met. This is the default for Media Class Non Real Time .
Exclusive	Agents cannot be presented calls whilst handling a call of this Classification as the Active Call. When a call of this type is parked, then this mode has no effect. This is the default for Media Class Real Time .
Same or Higher Priority Media Class	Agents can be presented calls of the same or higher priority Media Class

Value	Description
	whilst handling a call of this Classification as the Active Call.
Higher Priority Media Class	Agents can be presented calls of higher priority Media Class whilst handling a call of this Classification as the Active Call.
Same or Lower Priority Media Class	Agents can be presented calls of the same or lower priority Media Class whilst handling a call of this Classification as the Active Call. This is the default for Media Class Near Real Time .
Lower Priority Media Class Only	Agents can be presented calls of lower priority Media Class whilst handling a call of this Classification as the Active Call.

The relative priority of Media Classes is defined by the Agent's Media Class Order of Precedence.

C.3.3 Quota Routing Guard Time

The Classification setting *Quota Routing Guard Time* is a time period that prevents Agents being presented calls without a reasonable elapsed time since the last interruption, or call.

This value is in seconds and 0 to 3600 is permitted.

0 disables the timer.

C.4 Configuring Agents for Quota Routing

C.4.1 Quota Routing Mode

Agents are enabled for Quota Routing by configuring the User Profile setting *Quota Routing Mode* to **Standard**. If this setting is **None**, the Quota Routing feature is disabled for the Agent.



Quota Routing Mode ▼
Standard ▼

C.4.2 Quota Routing Decline?

Set this to **Yes** if Agents are to be allowed to decline a presented Quota Routing call.

C.4.3 Quota Routing Call Accept Timeout Mode

Determines how a call presented by Quota Routing is to be treated if the agent does not respond within the accept time, and has these possible values:.

Value	Description
Activate	The new (Quota Routing) Call is made the active Call and the existing Call is parked.
Re-queue	The new (Quota Routing) Call is re-queued and the existing Call remains Active



NOTE: Only applicable if Media Class is not Real Time.

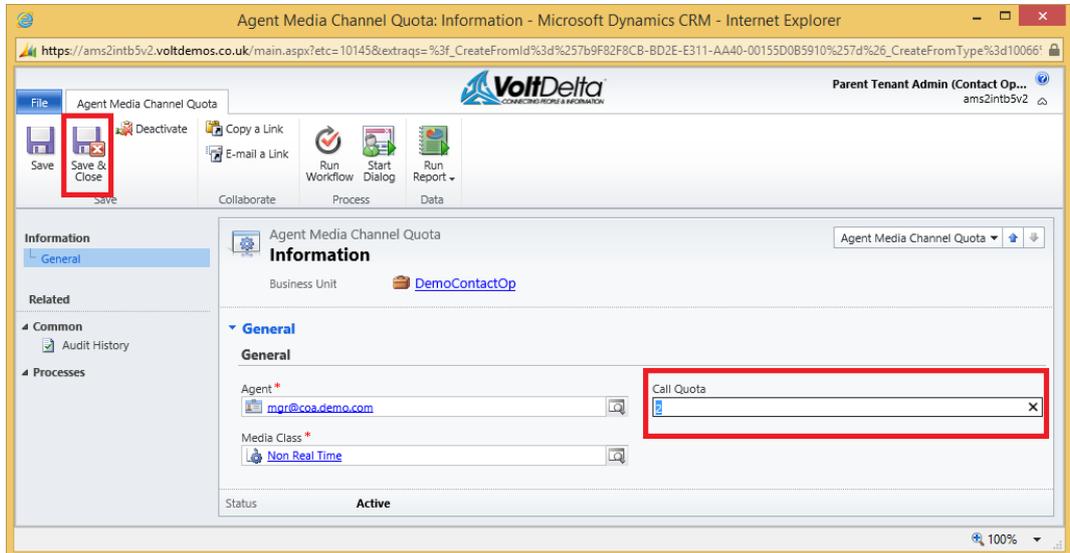
C.4.4 Call Quotas

This defines the Call Quotas for each Media Class or Media Type (depending on the Business Unit setting *Media Class Mode*).

Each Media Class (or Media Type) is listed, and a Call Quota and Order of Precedence can be configured.

To configure the Call Quota for a Media Class (or Media Type), click on the *Media Channel Quotas* grid, and then double-click on the required Media

Class (or Media Type). The following dialog will be displayed. Change the **Call Quota** (maximum value is 10), and then click **Save & Close**.



To configure the Order of Precedence for a Media Class (or Media Type), click on the Media Channel Quotas grid, and then click on the required Media Class (or Media Type). Use the **Move Down** and **Move Up** buttons on the ribbon bar to change the Order of Precedence.

