Lucent Technologies
Bell Labs Innovations

HOME AGENT® APPLICATION
Installation and Operations

Notice

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Your Responsibility for Your System's Security

Toll fraud is the unauthorized use of your telecommunications system by an unauthorized party, for example, persons other than your company's employees, agents, subcontractors, or persons working on your company's behalf. Note that there may be a risk of toll fraud associated with your telecommunications system and, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

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

Part 68: Answer-Supervision Signaling. Allowing this equipment to be operated in a manner that does not provide proper answer-supervision signaling is in violation of Part 68 rules. This equipment returns answer-supervision signals to the public switched network when:

- Answered by the called station
- Answered by the attendant
- Routed to a recorded announcement that can be administered by the CPE user

This equipment returns answer-supervision signals on all DID calls forwarded back to the public switched telephone network. Permissible exceptions are:

- A call is unanswered
- A busy tone is received
- A reorder tone is received

Trademarks

See "Trademark" section in "About This Guide."

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Contents

Contents

About This Guide

⇒ NOTE:
> The information in this section, *About this Guide*, supersedes that in the guide, *HOME AGENT Application Home Agent's Instructions*, 555-035-705.

This guide contains information for installing and administering the Automatic Call Distribution (ACD) HOME AGENT® application with the following communications systems (switches):

- DEFINITY® Communications System Generic 1.1 and later releases, referred to as G1 systems or switches in this guide.

- DEFINITY Communications System Generic 3, Version 1 and later releases, referred to as G3 systems or switches in this guide.

- DEFINITY Enterprise Communications Server (ECS), referred to as DEFINITY ECS systems or switches in this guide.

Although installation and administration of HOME AGENT is very similar for DEFINITY G1, G3, and ECS switches, when there is a difference, it is so noted.

> ⚠ **CAUTION:**
> *LUCENT TECHNOLOGIES ASSUMES NO RESPONSIBILITY FOR UNAUTHORIZED CALLS PLACED WHILE THE HOME AGENT APPLICATION IS IN USE. The HOME AGENT application was designed to provide agents working from their homes (home agents) the same capabilities as agents working on premises. Therefore, home agents logged into the application can place outbound, long-distance calls if your on-premises agents can. The HOME AGENT feature, Place Call, gives home agents access to the public network. To restrict an agent's outgoing calls, use the following switch features:*
>
> *For DEFINITY G1, G3, and ECS switches: Class of Restrictions*

Prerequisite Skills and Knowledge

This guide is written with the assumption that you are already well informed about and practiced in working with the following:

- UNIX® operating system
- CONVERSANT® system, Release 1 Versions 3.1, 4.0, or 6.0
- Whichever system you are working with:
    — DEFINITY Communications System G1 or G3 system
    — DEFINITY ECS
- ACD
- Expert Agent Selection (EAS), if it is enabled on your switch

Related Resources

INTUITY CONVERSANT System Version 6.0 New System Installation, 585-310-198, Issue 1

INTUITY CONVERSANT System Version 6.0 Upgrade, 585-310-183, Issue 1

Technical Help

If you have questions about UNIX, CONVERSANT, the switch, or ACD, consult the appropriate documentation. If you cannot find answers to your questions in the documentation, call the Lucent Technologies National Customer Care Center, 1-800-344-9670.

Conventions

➡ **NOTE:**
> The terms *switch*, *system*, and *PBX* are all used in this guide to refer to DEFINITY G1, G3, and ECS systems. The term used depends on the most common usage in the particular context.

The following typographic conventions are used in this guide:

- Keyboard keys are shown in capital letters, and are enclosed in boxes with round corners, like this:

    Press (ENTER).

- Function keys, which indicate the function keys (F1 through F8) on your keyboard, are shown in capital letters, followed by the function key number enclosed in boxes with round corners, like this:

    Press INSERT (F2).

- Keys on your telephone keypad are enclosed in boxes with square corners, like this:

  Press ⁎.

- Words that appear on your monitor's screen are shown in typewriter-style, like this:

  ```
  Restore is finished.
  ```

- Words that you type and the names of commands are in bold letters, like this:

  Type **home-agent**.

  After you enter the **recall** command...

Trademarks

CONVERSANT is a registered trademark of Lucent Technologies.

DEFINITY is a registered trademark of Lucent Technologies in the United States and throughout the world.

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Overview

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Figure 1-1 shows the various elements related to the HOME AGENT
application. Please refer to the figure as you read the description that
follows it.
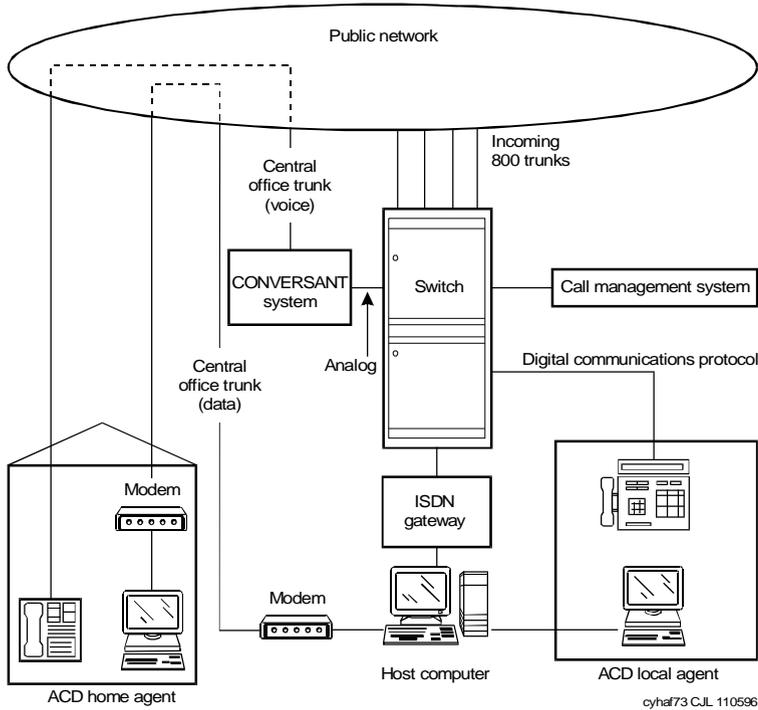
Figure 1-1. **A Typical HOME AGENT Configuration**

HOME AGENT allows Automatic Call Distribution (ACD) agents to work from their homes or from satellite business locations. Using any standard analog touch-tone telephone, home agents dial the regular 7- or 10-digit public-network number that connects them to the CONVERSANT system, which is connected to the switch. Via touch tones, home agents log into the CONVERSANT system and enter various commands. The CONVERSANT system translates these commands and sends the converted signals to the switch. The switch cannot distinguish between home and local agents. Thus, home agents

are, in fact, extensions of the in-office call center. Home agents are logged into the switch and have 2-way voice paths. Supervisors can monitor the performance of home agents via the Call Management System (CMS) as though they were local agents. Home agents may be members of any split or skill group, and incoming ACD calls are routed to them just as they are to local agents. In short, home agents can provide customers with exactly the same services as local agents.

Installation Task List

Depending upon the agreement between your organization and Lucent Technologies, part or all of the installation process for the HOME AGENT application may be done by Lucent Technologies. You should check with your telecommunications administrator to see what has and has not been done by Lucent Technologies.

These are the tasks related to installing the HOME AGENT software:

Task 1 — Administering the switch

Task 2 — Verifying switch connectivity

Task 3 — Removing HOME AGENT software

Task 4 — Loading HOME AGENT software

Task 5 — Configuring the number of agents and associated ports

Task 6 — Editing appropriate tables

Task 7 — Verifying that HOME AGENT is working properly

Task 8 — Backing up your system

These tasks are described in the next chapter.

Tasks

2

The following are the tasks related to installing the HOME AGENT software.

Task 1 — Administering the Switch

To facilitate the operation of the HOME AGENT application, the only switch administration you need to do is to set up an Automatic Call Distribution (ACD) hunt group or, if Expert Agent Selection (EAS) is enabled on your switch, an EAS hunt group. This task does not give precise steps to follow because we assume that you already have some experience in administering your switch. (If you have questions about switch administration, consult the appropriate switch-administration documentation.) The information presented here is intended to explain how the hunt group is related to subsequent installation tasks. Illustrations are included to explain the hardware.

While administering the switch, note the following information, which you will need to complete later tasks:

- The numbers the home agent will dial to reach the CONVERSANT system

- The CONVERSANT system channel numbers where the analog ACD extensions come into the CONVERSANT from the switch (not needed with EAS)

- The number to dial to reach the ACD or skill-hunt group

- The extension numbers of ACD ports on the switch (not needed with EAS)

- ACD login identification length (not needed with EAS)

- Call Management System (CMS) login identification (not needed with EAS)

- The ACD feature-access codes used by the switch for login, logout, auto-in, manual-in, AUX, after-call work, supervisor assist, add-agent-skill, and remove-agent-skill (EAS switches only)

- If DEFINITY ECS and EAS, note the reason code value on the System-Parameters Customer form and the AUX work reason code type and logout reason code type on the System-Parameters Features form.

Each home agent requires two channels on the CONVERSANT system.

- One channel, connected to the switch, allows communication between the home agent and the switch. This first channel must be administered on the switch as an analog ACD agent port.

- The other channel receives calls from home agents dialing through the public network to access the system.

On your switch, set up a hunt group that your customers will reach either directly or via a routing mechanism (typically vectoring). The hunt group should be large enough to accommodate peak traffic coming to both in-office and home agents.

If a home agent has an INTUITY™ voice messaging mailbox attached to their HOME AGENT login ID, their attempt at logging into HOME AGENT could fail when they have a new message waiting in their mailbox. If this happens, administer the mailbox as follows. On the INTUITY AUDIX administration system, enter **change subscriber extn** (where **extn** is the extension number of the AUDIX mailbox associated with the agent login ID). After this command is processed, you will be in the Change Subscriber screen for this mailbox. Change the value in the "Switch Number" field to **0** (zero) and submit the change. This prevents the INTUITY AUDIX system from notifying the switch when there is a new message waiting for this mailbox. The agent should now

be able to log in successfully to the HOME AGENT system when there is a new message waiting in their mailbox.

Your system has either an all tip/ring (T/R) configuration or a T/R with a T1 interface (T/R with T1) configuration. A maximum of 24 agents is supported with an all T/R configuration, and a maximum of 48 agents is supported with a T/R with T1 interface.

Figure 2-1 shows a hypothetical 6-agent system with an all T/R configuration. (To reach the hunt groups shown in the figure, the customer dials 1-800-xxx-4000, the member split extensions being 4001 through 4006.)
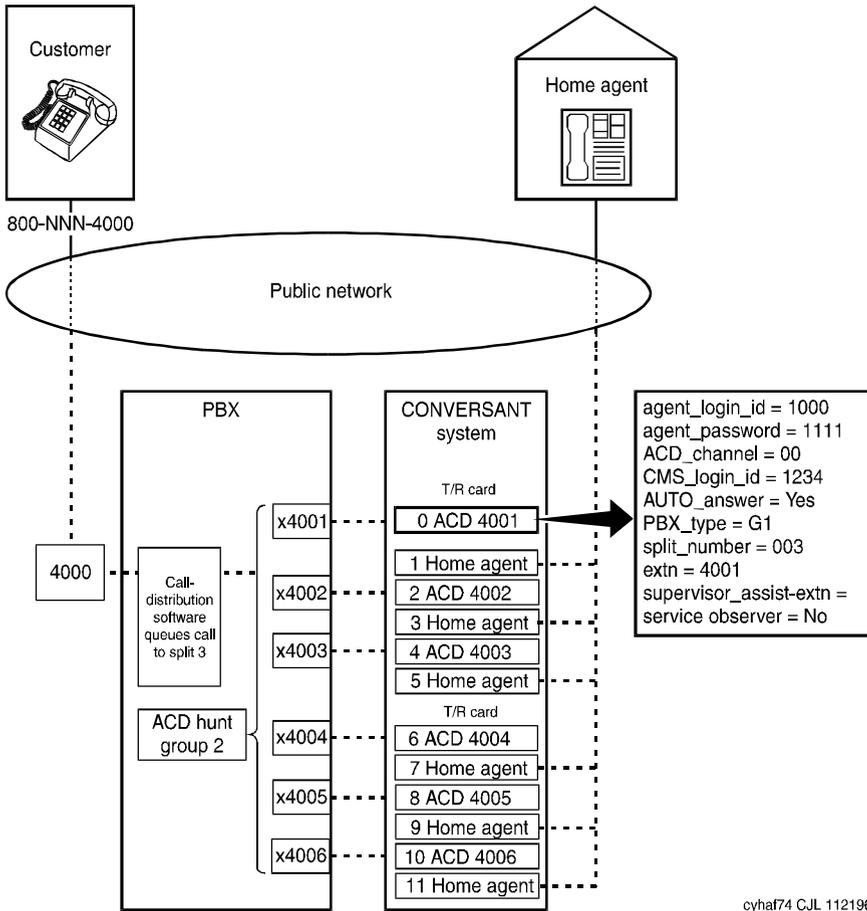
Figure 2-1.   An All T/R Configuration (Hypothetical 6-Agent System)

In an all T/R environment, as shown in Figure 2-1, the HOME AGENT application automatically assigns ACD and home_agent scripts to alternate consecutive channels so that, if a problem occurs with a T/R board, fewer agents — three rather than six — are affected.
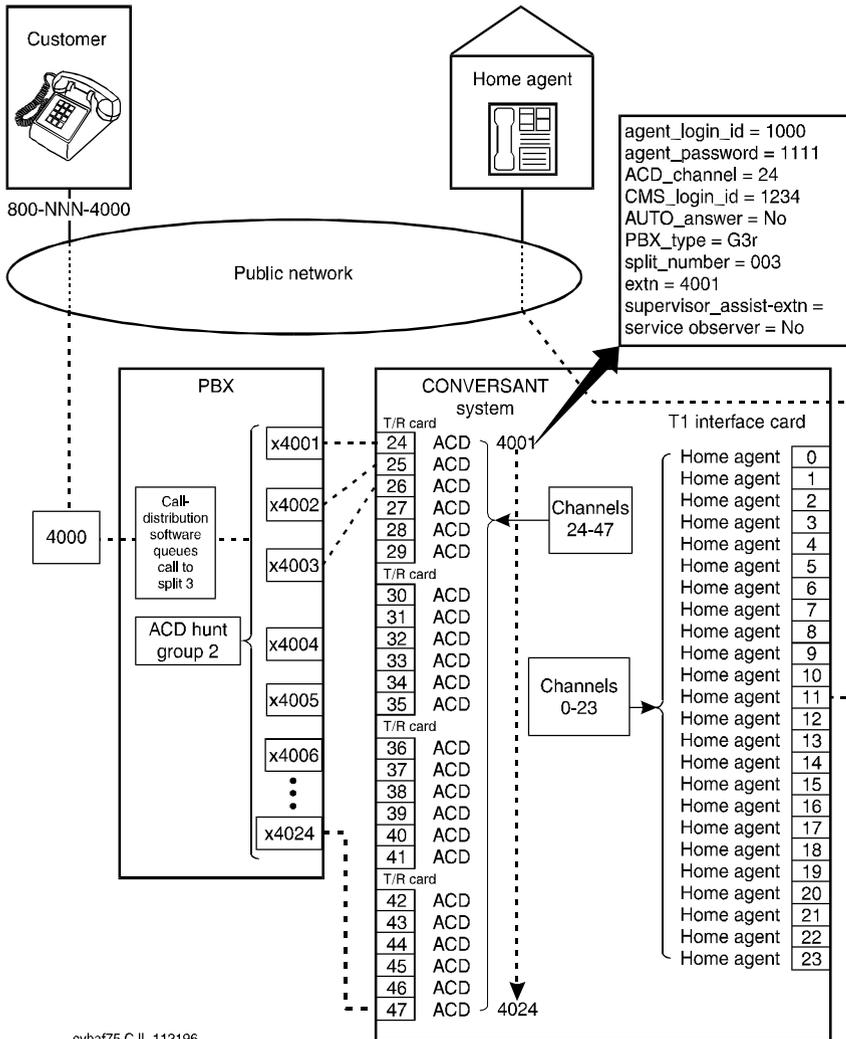
Figure 2-2 shows a T/R with T1 configuration.

Figure 2-2.   A T/R with T1 Configuration (24-Agent Capacity)

In the T/R with T1 configuration, as shown in Figure 2-2, the HOME AGENT application automatically assigns home_agent scripts to the T1 channels (because home agents dial into the T1 to access the system), and it automatically assigns the ACD scripts to the T/R channels. Typically, the lower-numbered channels (0 to 23 in the 24-agent system shown in the previous figure) are T1 channels and the higher-numbered channels (24 through 47 in the figure) are T/R channels. In the T/R with T1 configuration, if a problem occurs with a T/R board, six agents are temporarily disabled. If a problem occurs with the T1 interface, more channels are affected.

Task 2 — Verifying Switch Connectivity

Information about the physical connections to the voice channels is in *INTUITY CONVERSANT System Version 6.0 New System Installation*, 585-310-198, Issue 1 and *INTUITY CONVERSANT System 6.0 Upgrade*, 585-310-183, Issue 1. This section is intended as a supplement to these documents.

If your system configuration requires more than four T/R boards, it is highly recommended that you use a T/R distribution panel. Installation of that panel is described in sufficient detail in the CONVERSANT documentation; however, the following application-specific information is extremely important.

First, in systems configured with T1 hardware, you must place the T1 boards in the first available slots in the expansion cabinet and then install the T/R hardware into the remaining slots. Each T/R board handles six channels; therefore, from two to eight T/R boards are required in a T1 arrangement. All of the T/R channels that are used by HOME AGENT are automatically assigned the ACD script. As the name of the script implies, all of these channels must be directly wired to the PBX's analog ACD lines intended for use by the HOME AGENT application.

It is important to note that, although each T/R board handles six channels, each board has only two modular plugs. Therefore, the cables coming in from the PBX and/or the central-office (CO)-provided connecting block must be wired

carefully so that the correct pairs in the 25-pair, high-density cables (USOC RJ21X) going into the distribution panel end up in the correct place.

Smaller systems may be configured with only T/R hardware. In all T/R systems, half of the T/R channels must be used as the dial-up lines for the home agents. With a maximum capacity of eight T/R boards, up to 24 agents can be handled in an all T/R arrangement. Within the range of CONVERSANT system channels that will be used by the HOME AGENT application, the lowest-numbered channel will be assigned the ACD script. Therefore, the ACD analog pairs from the switch must be wired into every other channel. The remaining channels should have CO (or PBX) pairs coming into them. These channels will be assigned the HOME AGENT script after installation is complete.

Verifying Switch Connectivity for CONVERSANT Systems 3.1 and 4.0

1. From the UNIX prompt, enter **cvis_menu** to display the Voice System Administration window.

2. Highlight `Configuration Management` and press (ENTER) to display the Configuration Management window.

3. Highlight `Voice Equipment` and press (ENTER) to display the Voice Equipment window.

4. Press CHG-KEYS (F8) to change the function key choices.

5. Press ASSIGN (F3) to display the Assign window.

6. Highlight `Services to Channels` and press (ENTER) to display the Assign Service to Voice Channels window.

7. In the blank space after `Service`, enter **chantst** (for channel test).

8. In the blank space after `Channels`, enter the number of each channel (separating one channel number from another with a space) to which you wish to assign the channel-test script so you can test the channel. If you wish to assign the channel-test script to all channels, enter **all**.

9. Press SAVE (F3) to display the Command Output window that will show that the changes have been saved.

10. Press CANCEL ⒡⒢ to close the Command Output window.

11. Press CANCEL ⒡⒢ to close the Voice Equipment window.

12. Press CANCEL ⒡⒢ to close the Configuration Management window and return to the Voice System Administration window.

13. Highlight `System Monitor` and press ⒠⒩⒯⒠⒭ to display the System Monitor – Voice Channels window.

14. Observe the System Monitor – Voice Channels window while you dial into each of the channels you selected in Step 8 to verify that:

    ■ You can call each of the channels.

    ■ Each channel answers.

    ■ You can hear the voice prompts.

    ■ The script can hear your touch-tone signals.

15. When you finish making these verifications, press CANCEL ⒡⒢ to close the System Monitor–Voice Channels window.

16. Press CANCEL ⒡⒢ to close the Voice System Administration window and return to the UNIX prompt.

Verifying Switch Connectivity for CONVERSANT System 6.0

1. From the UNIX prompt, enter **cvis_menu** to display the Voice System Administration window.

2. Highlight `Configuration Management` and press ⒠⒩⒯⒠⒭ to display the Configuration Management window.

3. Highlight `Voice Equipment` and press ⒠⒩⒯⒠⒭ to display the Voice Equipment window.

4. Highlight `Voice Services` and press ⒠⒩⒯⒠⒭ to display the Voice Services window.

5. Highlight `Channel Services` and press ⒠⒩⒯⒠⒭ to display the Channel Services window.

6. Highlight `Assign Service` and press (ENTER) to display the Assign Channel Service window.

7. In the blank space after `Channels`, enter the number of each channel (separating one channel number from another with a space) to which you wish to assign the channel-test script so you can test the channel. If you wish to assign the channel-test script to all channels, enter **all**.

8. In the blank space after `Service`, enter **chantst** (for channel test).

9. Press SAVE (F3) to display a window that will show that the changes have been saved.

10. Press ACKNOWLG MESSAGE (F1) to return to the Assign Channel Service window.

11. Press CANCEL (F6) to close the Assign Channel Service window.

12. Press CANCEL (F6) to close the Channel Services window.

13. Press CANCEL (F6) to close the Voice Services window.

14. Press CANCEL (F6) to close the Voice Equipment window.

15. Press CANCEL (F6) to close the Configuration Management window.

16. Highlight `System Monitor` and press (ENTER) to display the System Monitor – Voice Channels window.

17. Observe the System Monitor – Voice Channels window while you dial into each of the channels you selected in Step 6 to verify that:

    ■ You can call each of the channels.

    ■ Each channel answers.

    ■ You can hear the voice prompts.

    ■ The script can hear your touch-tone signals.

18. When you finish making these verifications, press CANCEL (F6) to close the System Monitor – Voice Channels window.

19. Press CANCEL (F6) to close the Voice System Administration window and return to the UNIX prompt.

Task 3 — Removing HOME AGENT Software

> ➡ **NOTE:**
> In the following remove procedures, when "Lucent Technologies" is shown as text on the screen, it may also be shown as "AT&T" if the software was installed before the existence of Lucent Technologies.

If HOME AGENT is already installed on your CONVERSANT system, it is necessary to remove that software before installing another version of HOME AGENT.

Removing Home Agent Software on CONVERSANT Systems 3.1 and 4.0

1. Log into the UNIX system as **root**.

2. Enter **removepkg**.

   A list of all packages is displayed and you see the following:

   ```
   Select a number from this list to remove:
   ```

3. If you see the following on the list, HOME AGENT is installed on your machine:

   ```
    Lucent Technologies HOME AGENT/Telecommuting Gateway Release X.X
   ```

   > ➡ **NOTE:**
   > If you do not see the above message on the list, HOME AGENT is not installed on your machine. You need to press ⌈DELETE⌋ to exit from the **removepkg** procedure, and you should proceed to Task 4.

   If HOME AGENT is installed on your machine, enter the number associated with this package (located on the screen to the left of the package name).

Once the **remove** procedure begins, you see the following:

```
        LUCENT TECHNOLOGIES HOME AGENT SYSTEM

Lucent Technologies HOME AGENT/Telecommuting Gateway
Copyright (c) 1991 Lucent Technologies Bell Laboratories
All Rights Reserved

REMOVE PROCEDURE
```

■ If the voice system is not running, you see the following:

```
The Voice System must be running to remove this package.
Start it via 'start_vs' and retry the remove command.
```

You exit from the **removepkg** procedure and return to the UNIX prompt.

■ If the voice system is running, you see the following:

```
SPEECH FILES
_____

Removing Home Agent SPEECH files. . .
******************************************************
* This command will remove the listfile and all the  *
* speech data associated with it.                     *
******************************************************

Do you want to continue (y/n)?
```

4. Enter **y** to remove existing HOME AGENT speech talkfiles.

You see the following:

```
L U C E N T   T E C H N O L O G I E S   H O M E   A G E N T   S Y S T E M

SPEECH FILES REMOVE PROCEDURE :

_____

W A R N I N G
This procedure will make the home agent system inoperable. Though
scripts may run, there will be no speech to play back.
```

```
NOTE: To re-install the speech files later you will need to use the
HA software diskette labeled SPEECH, and run the command:

        /usr/add-on/home_agent/sp_install_ha
```

_____

Then you see the following:

DATABASE TABLES

_____

```
******************************************************************
* The HOME AGENT database tables contain logins and PBX feature-*
* access-codes data.                                            *
*                                                               *
* W A R N I N G                                                 *
* Do NOT remove these tables if you will be upgrading your HOME *
* AGENT software or you will have to reenter the data.          *
******************************************************************

Do you want to remove HOME AGENT database tables? [y/n]
```

➡ NOTE:

Different releases of HOME AGENT are not compatible with each other; therefore, it may not be possible to preserve your data. If you are unsure about this, contact your Lucent Technologies TSC support personnel.

Depending on your answer to the above question, you see the following messages.

If you enter **y**, you see the following:

```
Removing HOME AGENT database tables. . .
```

or

If you enter **n**, you see the following:

```
HOME AGENT database tables left unchanged.
```

Then, you see the following:

_____

```
The Conversant Voice System must NOW be stopped to continue with
this removepkg procedure. This will drop all active voice calls and
disable any running applications. The voice system will restart
automatically after the removal completes.

Is it okay to STOP the voice system? [y/n]
```

5. Enter **n** to stop the **remove** procedure.

   You see the following:

```
Remove Procedure Aborted.

Use command 'stop_vs" to stop the Voice system, and then
use the removepkg command again later to clean-up removal
of remaining system files.
```

   or

   Enter **y** to continue the **remove** procedure.

   The **remove** procedure continues and you receive the following
   confirmation message:

```
SYSTEM FILES
```

_____

```
Removing Home Agent SYSTEM and TOOLS files. . .
```

   After all the software is removed, the voice system is restarted and you
   see:

```
VOICE SYSTEM NOW RE-STARTED
```

_____

   The **remove** procedure is now complete.

Removing Home Agent Software
on CONVERSANT System 6.0

1. Log into the UNIX system as **root**.

2. Enter **pkgrm**.

3. If you see the following on the list, HOME AGENT is installed on your machine:

```
HMAGNT    Lucent Technologies HOME AGENT/Telecommuting Gateway Release 6.0
          (386) 6.0

          Do you want to remove this package [y, n, ?, q]
```

> ⇒ **NOTE:**
> If the voice system is not running, you are prompted to enter **y** to start the voice system or **n** to not start the voice system. If you enter **n**, the removal procedure is stopped.

4. Enter **y** to remove the package.

   You see the following:

```
## Removing installed package instance <HMAGNT>
## Verifying package dependencies.
## Processing package information.
## Executing preremove script.
The HOME AGENT 'agents' database contains agent login records.

You may NOT want to remove these records if you will be upgrading
your HOME AGENT software.

Is it ok to remove the HOME AGENT 'agents' database table? (default: y)
```

> ⇒ **NOTE:**
> If you enter **n** next, you see a message stating that the **agents** database table is left unchanged.

5. Enter **y** to remove the **agents** database table.

   You see the following:

   ```
   Removing HOME AGENT 'agents' database table. . .
   agents
   ```

   ```
   The HOME AGENT 'facs' database contains PBX feature access code
   records.
   ```

   ```
   You may NOT want to remove these records if you will be upgrading
   your HOME AGENT software.
   ```

   ```
   Is it ok to remove the HOME AGENT 'facs' database table? (default: y)
   ```

   ➡ **NOTE:**
   If you enter **n** next, you see a message stating that the **facs**
   database table is left unchanged.

6. Enter **y** to remove the **facs** database.

   You see the following:

   ```
   Removing HOME AGENT 'facs' database table . . .
   facs
   ```

   ```
   The Voice System must NOW be stopped to continue with this pkgrm
   procedure. This will drop all currently active voice connections.
   The Voice System will be restarted after the remove completes.
   ```

   ```
   Is it ok to STOP the Voice System? (default: y)
   ```

   ➡ **NOTE:**
   If you enter **n** to stop the voice system or the attempt to stop the
   voice system fails, the removal procedure is stopped.

7. Enter **y** to stop the voice system.

   You see the following:

   ```
   Stopping Voice System. . .
   ```

   ```
   The Voice System is now stopping
   ```

   ```
   Initiating request to clear all calls in the next 180 seconds.
   ```

   ```
   Orderly idling of system succeeded
   ```

```
After the Voice System has completely stopped, use the
'Start Voice System' choice from the System Control menu
to start the Voice System.

The Voice System has stopped

## Removing pathnames in <cron> class
## Removing pathnames in <none> class
/vs/trans/home_agent.T
/vs/trans/home_agent.D

....

## Executing postremove script.

The voice system will now be restarted.

Inittab changed.  Re-building the inittab
Inittab successfully rebuilt
running bitmapmgr . . .
bitmapmgr completed.
ORACLE RDBMS is already started

The Voice System is starting

The Voice System is initializing cards

Startup of the Voice System is complete

## Updating system information.

Removal of <HMAGNT> was successful.
```

The **pkgrm** procedure is now complete.

Task 4 — Loading HOME AGENT Software

➭ **NOTE:**
In the following loading procedures, when "Lucent Technologies" is shown as text on the screen, it may also be shown as "AT&T" if the software was installed before the existence of Lucent Technologies.

Loading HOME AGENT Software on CONVERSANT Systems 3.1 and 4.0

To install HOME AGENT, you must have these software packages on your CONVERSANT system:

- CONVERSANT VIS Application

- Base ORACLE DBMS

- CONVERSANT VIS Script Builder

- CONVERSANT VIS SP Board Driver

- Application Software Update 5a or later version for CONVERSANT VIS 4.0

To load the two HOME AGENT software diskettes on the CONVERSANT system via the install package, follow this procedure.

1. Log into the UNIX system as **root**.

2. From the UNIX prompt, enter **installpkg**.

3. Indicate that the installation medium is "Floppy Diskette" and insert the floppy diskette.

   You see the following:

   ```
   L U C E N T   T E C H N O L O G I E S   H O M E   A G E N T   S Y S T E M

   Lucent Technologies HOME AGENT/Telecommuting Gateway
   Copyright (c) 1993 Lucent Technologies Bell Laboratories.
   All Rights Reserved.
   ```

You must have the following applications already installed on your system. If any of these is not present, you will see the corresponding message. If the message is an error, you are exited from the **installation** procedure.

Uninstalled Application	Corresponding Message
CONVERSANT System Software	+ERROR: The CONVERSANT VIS system is NOT yet installed. Install CONVERSANT Application Software (Version 3.1 or 4.0 is mandatory) before HOME AGENT install. Installation Aborted.
Obsolete CONVERSANT Software (before Version 3.1)	This version of HOME AGENT is not compatible with Version 3.0. Installation Aborted.
Base ORACLE DBMS	+ERROR: The ORACLE DBMS package is NOT yet installed. Install the ORACLE Database system Version 3.0 or later (base package minimum) before HOME AGENT install. Installation Aborted.
CONVERSANT System SP Board Driver	+ERROR. The SP Board driver package is missing. This driver must be present to operate the required SP board hardware. Install before HOME AGENT install. Installation Aborted.
CONVERSANT System Script Builder	+ERROR. The Script Builder software package is missing. This package is needed to administer agent login and PBX FAC database tables in HOME AGENT. Install Script Builder before HOME AGENT install. Installation Aborted.
Application Software Update 5a or later version CONVERSANT System 4.0	+WARNING. The Application Software Update 5a or later package is missing. It is recommended that this package be installed for optimal HOME AGENT performance.

4. Assuming that all required software packages are installed, at the prompt, press (ENTER).

The voice system must have been stopped before beginning the install procedure. If it was not, you see the following:

```
Voice system is currently running.
To continue this installation procedure, it must be stopped,
dropping all currently active voice connections.
Is it ok to STOP the voice system at this time? [y/n]
```

5. Enter **n** to stop the install procedure and return to the UNIX prompt.

   or

   Enter **y** to stop the voice system.

   The **installation** procedure continues (**/vs/bin/stop_vs** is executed), and you see the following:

```
INSTALL HOME AGENT SYSTEM
_____
Installing HOME AGENT System and Tools files.
```

If the process of copying files fails, you receive the following error message:

```
+ERROR:  An error occurred while copying files.
Try installing this package again, but if it continues to fail,
then please check with your Lucent Technologies Service
Representative.

Installation Aborted.
```

If the process of copying files succeeds, you see the following:

```
The ha_dip process is compatible with CVIS V4.0
```

(or whatever CONVERSANT release you have.)

Next, error tracker messages are created for the HOME AGENT application. You are prompted:

```
Do you want to overwrite etStub.rules?
```

6. Enter **y** to have the error tracker report errors about HOME AGENT.

   You see the following:

   ```
   VOICE SYSTEM WILL NOW BE RE-STARTED
   ```

   _____

   The command **/vs/bin/start_vs** will now be executed.

   Next, you are prompted to create HOME AGENT databases:

   ```
   HOME AGENT DATABASE TABLES
   ```

   _____

   ```
   The default HOME AGENT database records contain sample agent logins
   and PBX feature access codes. These records MUST be installed if
   this is a FIRST-TIME installation so that table definitions are
   set. The records need NOT be installed if you are upgrading from a
   prior HOME AGENT software release.

   NOTE: These records will not install if someone is currently
   accessing the agents or facs databases via Script Builder.

   Is it ok to install default HOME AGENT database records? [y/n]
   ```

7. Enter **n** if you were able to preserve your database tables during the
   remove procedure.

   or

   Enter **y**.

   You see the following:

   ```
   Working...
   ```

   If an error occurred while installing default records into the databases,
   you see the following:

   ```
   +WARNING: An error occurred while installing DATABASE tables. Try
   installing this package again, but if it continues to fail, then
   please check with the Lucent Technologies Service Representative.

   Press return to continue...
   ```

Then, you see the following:

```
If HOME AGENT is being installed for the first time (i.e. not
upgrading from an earlier version of the software) and you did NOT
accept the default databases, be aware that you may need to
construct the databases from scratch. For some guidance in creating
tables with the correct field names, field sizes, and field types,
consult your HOME AGENT Application Installation and Operations
Manual.

Press return to continue...
```

8. Press ENTER.

   The installation converts the HOME AGENT to the existing Script Builder release and you see the following:

   ```
   Converting application: sb_conv home_agent Version_4.0....
   ```

   (or whatever Script Builder release you have.)

   You are then prompted to install the speech files:

   _____

   ```
   SPEECH FILES MUST NOW BE INSTALLED

   Please remove the HOME AGENT SYSTEM DISKETTE.

   Press ENTER to continue.
   ```

9. Remove the HOME AGENT diskette and press ENTER.

   You see the following:

   ```
   L U C E N T   T E C H N O L O G I E S   H O M E   A G E N T   S Y S T E M

   SPEECH FILES INSTALLATION PROCEDURE :
   ```

   _____

   ```
   HA speech files installation is performed with the HA software
   diskette labeled SPEECH. Please follow the steps listed below:

   1. Ignore the phrase renumbering warning message below.
   2. Answer "y" to prompt "Do you want to continue (y/n)?"
   3. Insert the SPEECH diskette when you see the prompt: "Insert
      floppy disk 1."
   4. Verify that the speech installation reports successfully.
   ```

   _____

The installation procedure is now complete.

If HOME AGENT was installed at the factory, default database records were installed. If you are installing the HOME AGENT software, we highly recommend that you accept the default HOME AGENT database records. (Later you will edit the accepted records so that they match the values you entered when you administered the switch.) If you do not wish to install the default HOME AGENT database records, make sure that the fields for the two HOME AGENT database tables (the agent table named **agents** in Script Builder and the feature-access-codes table named **facs** in Script Builder) agree with specifications given in the following figure, and that the table names are exactly **agents** and **facs**. The figure specifies fields for the agent table on the left and for the feature-access-codes table on the right, listing field names, field types (where *char* means alphanumeric and *num* means numeric), and field sizes.

.

Agent Table (agents)			Feature-Access-Codes Table (facs)		
Field Name	**Field Type**	**Field Size**	**Field Name**	**Field Type**	**Field Size**
agent_login_id	char	9	facs_type	char	3
agent_password	char	9	fac_login	char	4
ACD_channel	num	2	fac_auto_in	char	4
CMS_login_id	char	10	fac_manual_in	char	4
auto_answer	char	3	fac_acw	char	4
PBX_type	char	3	fac_aux	char	4
split_number	char	4	fac_logout	char	4
extn	char	5	fac_assist	char	4
supervisor_ assist_extn	char	5	fac_malicious_ call_trace	char	4
service_observer	char	3	EASe	char	4
			monitor_warning_ tone	char	3
			fac_add_skill	char	4
			fac_remove_skill	char	4
			reason_aux_work	char	9
			reason_logout	char	9

> ⚠️ **CAUTION:**
>
> *Do not change table names, field types, or field sizes.* **The system will fail** *if any of these values are different from those shown.*

Loading HOME AGENT Software on CONVERSANT System 6.0

To install HOME AGENT, you must have these software packages on your CONVERSANT system:

- INTUITY CONVERSANT VIS V6.0 Set

- INTUITY Base ORACLE RDBMS 7.0.12

- INTUITY ORACLE 7 Integration Package

- INTUITY ASP Driver Package

- INTUITY Script Builder

If any of the above packages are not loaded on the CONVERSANT 6.0 system, the installation will fail.

To load the two HOME AGENT software diskettes on the CONVERSANT system, follow this procedure:

1. Log into the UNIX system as **root**.

2. From the UNIX prompt, enter **pkgadd -d diskette**.

   You see the following:

   ```
   Insert diskette into Floppy Drive 1.
   Type [go] when ready,
     or [q] to quit: (default: go)
   ```

3. Insert floppy diskette 1 into Floppy Drive 1 and enter **go**.

   ➡ **NOTE:**
   If you enter **q** after inserting the floppy diskette, the **pkgadd**
   procedure is stopped.

   You see the following:

   ```
   Installation in progress.  Do not remove the diskette.

   The following packages are available:
   HMAGNT    Lucent Technologies HOME AGENT/Telecommuting Gateway Release 6.0
             (386) 6.0

   Select package(s) you wish to process (or 'all' to process
   all packages). (default: all) [?,??,q]:
   ```

4. Enter **all** or select the packages you wish to process or press ENTER.

   You see the following:

   ```
   PROCESSING:
   Package: Lucent Technologies HOME AGENT/Telecommuting Gateway Release
   6.0 (HMAGNT) from <diskette1>.

   Lucent Technologies HOME AGENT/Telecommuting Gateway Release 6.0
   (386) 6.0

   Using </> as the package base directory.
           Copyright (c) 1993 Lucent Technologies Bell Laboratories.
           All Rights Reserved.
   ```

   If the voice system is running, you see the following:

   ```
   Voice system is currently running.
   It must be stopped for HOME AGENT installation,
   dropping all currently active voice connections.

   Is it ok to STOP the voice system for this installation? (default: y)
   ```

   ➡ **NOTE:**
   If you enter **n** to stop the voice system or the attempt to stop the
   voice system fails, the removal procedure is stopped.

5. Enter **y** to stop the voice system.

   You see the following:

   ```
   The default HOME AGENT 'agents' database contains sample agent login
   records. These records MUST be installed if this is a FIRST-TIME
   installation.

   NOTE: These records will not install if someone is currently accessing
         the 'agents' database via Script Builder.

   Is it ok to install default 'agents' database records? (default: y)
   ```

6. Enter **y** to install the **agents** database records.

   You see the following:

   ```
   The default HOME AGENT 'facs' database contains sample PBX feature access code
   records.  These records MUST be installed if this is a FIRST-TIME  installation.

   NOTE: These records will not install if someone is currently accessing
         the 'facs' database via Script Builder.

    Is it ok to install default 'facs' database records? (default: y)
   ```

7. Enter **y** to install the **facs** database records.

   You see the following:

   ```
   Installing speech files in directory /voice1/vfs/talkfiles. Is this ok?
   (default: y)
   ```

   ### ⇒ NOTE:
   The directory into which speech is placed is dictated by the
   SPEECHDIR variable in the file **/vs/data/irAPI.rc**. If SPEECHDIR is
   not set in this file, you see the following and the installation
   procedure is stopped:

   ```
   No default speech directory specified in /vs/data/irAPI.rc
   See "INTUITY CONVERSANT System Version 6.0 Speech Development,
   Processing, and Recognition" for further information.

   Installation Aborted.
   ```

8. Enter **y** to acknowledge speech directory.

   You see the following:

   ```
   ## Processing package information.
   ## Processing system information.
   ## Verifying package dependencies.
   ## Verifying disk space requirements.
   ```

```
Installing Lucent Technologies HOME AGENT/Telecommuting Gateway Release 6.0
as <HMAGNT>

## Executing preinstall script.
Stopping Voice System...

The Voice system is now stopping

Initiating request to clear all calls in the next 180 seconds.

Orderly idling of system succeeded

After the Voice System has completely stopped, use the
"Start Voice System" choice from the System Control menu
to restart the Voice System

The Voice System has stopped
## Installing part 1 of 2.
/voice1/vfs/talkfiles/44/100
/voice1/vfs/talkfiles/44/1002
.........
/att/trans/sb/home_agent/symbols
## Installing part 2 of 2.

Insert diskette 2 of 2 for <HMAGNT> package into Floppy Drive 1.
Type [go] when ready,
or [q] to quit: (default: go)
```

9. Insert floppy diskette 2 into Floppy Drive 1 and enter **go**.

    ⇒ **NOTE:**
    If you enter **q** after inserting the floppy diskette, the add procedure
    is stopped.

    You see the following:

```
/etc/conf/init.d/init_HA
/voice1/vfs/talkfiles/44/1000
..........
/vs/switches/analog/default/HA.pattern
[ verifying class <none> ]
[ verifying class <cron> ]
 ## Executing postinstall script.

The voice system will now be restarted.
```

```
Inittab changed.  Re-building the inittab
Inittab successfully rebuilt
running bitmapmgr ...
bitmapmgr completed.
ORACLE RDBMS is already started

The Voice System is starting

The Voice System is initializing cards

Startup of the Voice System is complete

Installing default 'agents' database records.
```

> **NOTE:**
> If unable to install the default agents database record, you see the
> following and you must press ENTER to continue:

```
+WARNING: An error occurred while installing 'agents' DATABASE table.
Try installing this package again, but if it continues to fail,
then please check with your Lucent Technologies Service Representative.

Press return to continue...

Installing default 'facs' database records.
```

> **NOTE:**
> If unable to install the default **facs** database record, you see the
> following and you must press ENTER to continue:

```
+WARNING:  An error occurred while installing 'facs' DATABASE table.
Try installing this package again, but if it continues to fail,
then please check with your Lucent Technologies Service Representative.

Press return to continue...
```

> **NOTE:**
> If it was indicated to not install either the default agents database
> or the default facs database, you see the following and you must
> press ENTER to continue:

```
If HOME AGENT is being installed for the first time and you did
NOT accept the default databases, be aware that you may need
to construct the databases from scratch.
```

```
        For some guidance in creating tables with the correct file name,
        field sizes and field types, consult your HOME AGENT Application
        Installation and Operations manual, Issue 4 or later.

        Press return to continue...
Converting application: sb_conv home_agent Version_6.0....
converting application home_agent
conversion completed

Installation of Lucent Technologies HOME AGENT/Telecommuting Gateway
Release 6.0 (HMAGNT) was successful.

Insert diskette into Floppy Drive 1.
Type [go] when ready,
  or [q] to quit: (default: go)
```

The installation procedure is complete.

10. Enter **q** to quit the **pkgadd** procedure.

If HOME AGENT was installed at the factory, default database records were installed. If you are installing the HOME AGENT software, we highly recommend that you accept the default HOME AGENT database records. (Later you will edit the accepted records so that they match the values you entered when you administered the switch.) If you do not wish to install the default HOME AGENT database records, make sure that the fields for the two HOME AGENT database tables (the agent table named **agents** in Script Builder and the feature-access-codes table named **facs** in Script Builder) agree with specifications given in the following figure, and that the table names are exactly **agents** and **facs**. The figure specifies fields for the agent table on the left and for the feature-access-codes table on the right, listing field names, field types (where *char* means alphanumeric and *num* means numeric), and field sizes.

Agent Table (agents)			Feature-Access-Codes Table (facs)		
Field Name	Field Type	Field Size	Field Name	Field Type	Field Size
agent_login_id	char	9	facs_type	char	3
agent_password	char	9	fac_login	char	4
ACD_channel	num	2	fac_auto_in	char	4
CMS_login_id	char	10	fac_manual_in	char	4
auto_answer	char	3	fac_acw	char	4

Agent Table (agents)			Feature-Access-Codes Table (facs)		
Field Name	**Field Type**	**Field Size**	**Field Name**	**Field Type**	**Field Size**
PBX_type	char	3	fac_aux	char	4
split_number	char	4	fac_logout	char	4
extn	char	5	fac_assist	char	4
supervisor_ assist_extn	char	5	fac_malicious_ call_trace	char	4
service_observer	char	3	EASe	char	4
			monitor_warning_ tone	char	3
			fac_add_skill	char	4
			fac_remove_skill	char	4
			reason_aux_work	char	9
			reason_logout	char	9

⚠ **CAUTION:**

> *Do not change table names, field types, or field sizes.* **The system will fail** *if any of these values are different from those shown.*

Task 5 — Configuring the Number of Agents and Associated Ports

To display current configuration information (the maximum number of agents currently allowed to log in through HOME AGENT and the CONVERSANT system channels set aside for use by HOME AGENT), go to the home_agent directory (**cd /usr/add-on/home_agent**) and enter **ha_admin -D**.

You may enter **ha_admin -a** if you wish to see only the number of agents, or **ha_admin -c** to see only the channel numbers.

If you wish to change the channels that are to be used by HOME AGENT, enter **ha_admin -C**, and address the prompts, which will ask you for the number of

agents to activate, the lowest numbered T1 channel used by HOME AGENT (if any), and the lowest-numbered T/R channel. The system will automatically assign the appropriate number of ports, according to the maximum number of agents configured.

*HOME AGENT will not use new values until you stop and restart the voice system via the **stop_vs** and **start_vs** commands.* Stopping the voice system will drop existing calls; therefore, you should not stop and start the voice system when there are active calls or when calls could be coming in. If calls come in at all times, you may want to temporarily route calls to an attendant for the few minutes it will take to stop and start the voice system.

Whenever you change configuration values, be sure to change the **agents** table (as described in the next section, *Task 6 — Editing Tables*) to reflect the changes.

Task 6 — Editing Tables

Editing Tables for CONVERSANT Systems 3.1, 4.0, and 6.0

This task consists of editing a feature-access-codes table, named **facs**, and an agent table, named **agents**. The **facs** record must be changed to reflect the correct values of the switch. One record must be made in the **agents** table for each home agent. The following steps guide you through the process of editing these tables.

1. From the UNIX prompt, enter **cvis_menu** to display the Voice System Administration window.

2. Highlight Script Builder Applications and press (ENTER) to display the Script Builder Applications window.

3. Highlight home_agent.

4. Press CHG-KEYS (F8) to change the function key choices.

5. Press DEFINE (F1) to display the Define Application window.

6. Highlight `Database Tables` and press (ENTER) to display the Table Name - Database Access ID window.

7. Highlight `agents` and press EDIT (F6) to display the Edit Table <agents> window.

   At this point, you can press ADD (F1) to add a record, CHANGE (F4) to change a record, or REMOVE (F2) to remove a record. The following steps indicate the ADD procedure.

8. Press ADD (F1) to add a new record.

   You receive the following:

```
AT&T CONVERSANT Script Builder                    Version 4.0   home_agent

    Edit Table <agents>
    Add Record to Table <agents>

    agent_login_id    ██████████
    agent_password    ██████████
    ACD_channel       ██
    CMS_login_id      ██████████
    auto_answer       ████
    PBX_type          ██████
    split_number      █████
    extn              ██████
    supervisor_assist_extn  ████████
    service observer  ████


Enter a record.  Press SAVE when record is complete.
 HELP              SAVE   REDRAW      LIST    CANCEL    EXIT
```
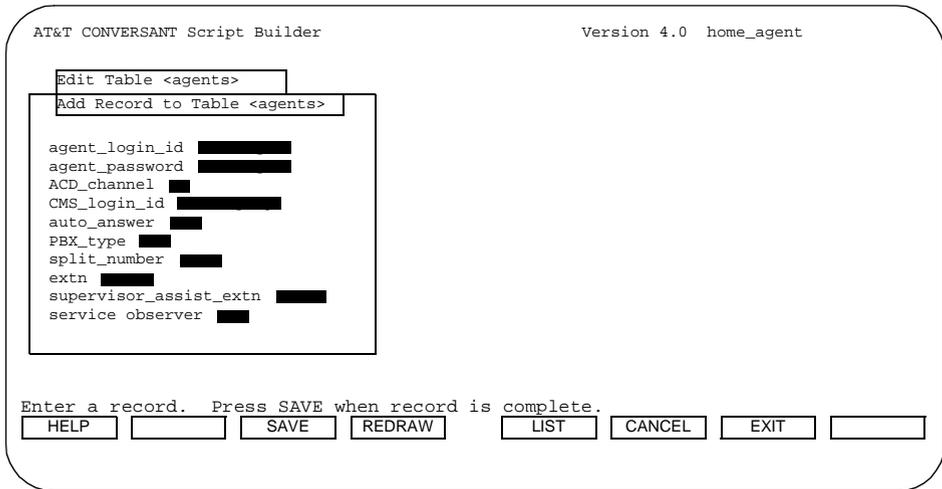
9. Add the values in the displayed fields as appropriate. Each record in the agent table represents the profile of one agent. When the field values for a record are as you want them, press SAVE (F3).

You receive the message "Save has been done." The following table gives a brief explanation of each field and the appropriate values to enter.

Field	Description	Appropriate Value
agent_login_id	This home agent's login ID	A 1- through 9-digit number
agent_password	The home agent's password (for EAS, this must match the expert agent's password administered on the switch)	A 1- through 9-digit number
ACD_channel	The CONVERSANT channel number used for the port-side connection to the PBX	A 2-digit number, 0 through 95 (not used with EAS)
CMS_login_id	The CMS ID (required for a G3r switch unless EAS is enabled). The number of characters in this field must match the value specified in the ACD Login Identification Length field on page 4 of the System-Parameters Features form on the system access terminal (SAT). If this value is 0, leave the field blank.	For a G1 switch, a 0- through 9-digit number. For a G3 or DEFINITY ECS switch, a 1- through 9-digit number (not used with EAS)
auto_answer	Specifies whether the agent will receive a single zip tone and be automatically connected to an incoming call or will receive continuous zip tones until they press the pound key (#) to be connected to an incoming call	"Yes" for single tone and automatic connection; "no" for continuous tones until key is pressed. (The default is "no.")
PBX_type	The switch that is being used	G1, G3i, or G3r

Field	Description	Appropriate Value
split_number	The split to which the home agent is assigned	For G1 and G3i switches, type the 2-digit split number (01 through 99) to which the home agent is assigned; for a G3r, a 3-digit split number (not used with EAS).
extn	The extension number of the ACD port to which the home agent is assigned	A 3- through 5-digit number (not used with EAS)
supervisor_ assist_extn	Field is no longer used.	Leave blank.
service observer	Field is no longer used.	Leave blank.

10. Press CANCEL (F6) to close the Add a Record to Table <agents> window.

11. Press CHG-KEYS (F8) to change the function key choices.

12. Press CANCEL to close the Edit Table <agents> window and go to the Table Name - Database Access ID window.

13. Highlight facs (for feature-access-codes table).

14. Press CHG-KEYS (F6) to change the function key choices.

15. Press EDIT F6 to go to the Edit Table (facs) window, shown next.

```
AT&T CONVERSANT Script Builder                    Version 4.0   home_agent

      Edit Table <facs>

    facs_type ███
    fac_login ███
    fac_auto_in ████
    fac_acw ████
    fac_manual_in ████   .
    fac_aux████ ███
    fac_logout ██████
    fac_assist████ ███
    EASe ████
    monitor_warning_tone ███
    fac_add_skill ████
    fac_remove_skill ████
    reason_aux_work █████████
    reason_logout ███████████

Press the appropriate function key.
  ADD      REMOVE              CHANGE        SEARCH    NEXT              CHG-KEYS
```
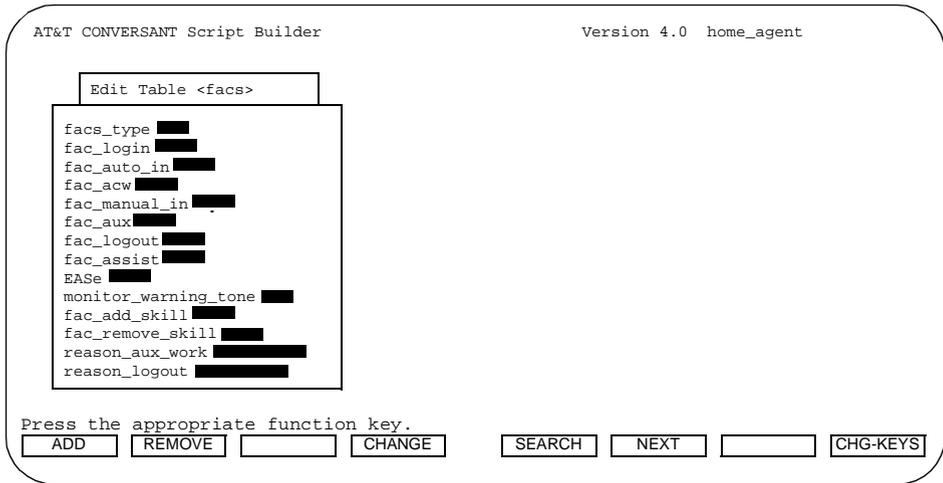
16. Press CHANGE F4 to go into the change mode.

17. Edit the feature-access-codes table according to the switch to which your HOME AGENT is connected, as follows:

- If your HOME AGENT is connected to a G1, G3, or DEFINITY ECS switch:

  — For the `facs_type` field, enter **G1**, **G3i**, or **G3r** as appropriate.

  — For the `monitor_warning_tone` field, enter **Yes** for an intermittent warning beep during service observing or **No** for no beep.

— For the EASe field, enter **Yes** if EAS is enabled on your switch.

— For each of the remaining fields, enter the appropriate feature-access codes, as administered on the switch.

➡ **NOTE:**

Do not create more than one feature-access-codes table (record). If you do, HOME AGENT will use only the first one created.

■ If your HOME AGENT is connected to DEFINITY ECS and EAS is enabled, and reason codes are enabled on the System-Parameters Customer form on the system access terminal (SAT):

— Enter **none**, **requested**, or **forced** for reason_ aux_work, as administered on your switch (default is **none**.)

— Enter **none**, **requested**, or **forced** for reason_ logout, as administered on your switch (default is **none**.)

18. Press SAVE F3.

19. Press CHG-KEYS F8 to change the function key choices.

20. Press CANCEL F6 to close the Edit Table (facs) window.

21. Press CANCEL F6 to close the Table Name - Database Access ID window.

22. Press CANCEL F6 to close the Define Applications window.

23. Press CANCEL F6 to close the Script Builder Applications window.

24. Press CANCEL F6 to close the Voice System Administration window and return to the UNIX prompt.

Task 7 — Verifying That HOME AGENT Is Working Properly

1. From the UNIX prompt, enter **cvis_menu** to display the Voice System Administration window.

2. Highlight `System Monitor` and press (ENTER).

3. Press CHG-KEYS (F8) to change the function key choices.

4. Press CHG-RATE (F1) to display the Change Refresh Rate window.

5. Enter **1** to change the refresh rate to 1.

6. Press SAVE (F3).

7. Keeping an eye on the System Monitor window, call into a HOME AGENT channel as though you were an agent. When prompted, enter a valid ID and password. After you do this, ACD will briefly appear on the System Monitor screen on the ACD channel as the CONVERSANT system logs you into the switch. You may see the feature-access code and the other tones required to log an agent into a hunt group on your switch. After hearing confirmation that you are logged in, enter the **auto-in** command [⍟ 2 (⍟ A)] to make yourself available, and then place some trial calls by dialing the vector directory number (VDN) or other hunt group extension, whichever is appropriate, to verify that you hear the zip tone as calls come and that pressing # establishes a 2-way talk path. If administered as an auto-answer agent, pressing # is not required for 2-way talk path.

Task 8 — Backing Up Your System

Be sure to back up your system so that all current data (agent table, feature-access-codes table, and maximum agent capacity) are safe. You should not rely on the HOME AGENT software as a backup because it has default values in the database tables.

⚠ **CAUTION:**
If you have a problem that results in lost data and you have failed to back up your system, you will have to redo all of your configuration administration manually.

Ongoing Administration

3

Ongoing administration is simply a matter of maintaining the feature-access-codes table and the agent table.

After initial administration of these two tables, you may never need to change the feature-access-codes table, and you will need to change the agent table only when you add a new agent, remove an agent, or change the parameters associated with an agent. Remember to back up your system after you make any changes.

If a home agent accidentally interrupts the login procedure, the Automatic Call Distribution (ACD) port may be tied up until you manually take it out of service (MANOOS) and then restore it to an inservice state (INSERV) via a CVIS Configuration Management screen.

The following describes use of the **ha_admin** command, which allows you to display and change HOME AGENT system configuration parameters. Because you must stop and restart the voice system to put parameter changes into effect, we recommend that you do administration during off-peak hours.

You must be in the /usr/add-on/home_agent directory to execute the **ha_ admin** command. The following command-line options are recognized by the **ha_admin** process.

- The **-D** option allows you to display the current values for the maximum number of agents allowed on the system and the CONVERSANT system channels used by HOME AGENT.

- The **-a** option, a subset of the **-D** option, allows you to display information about the maximum number of agents.

- The **-c** option, a subset of the **-D** option, allows you to display information on the number of activated agents and the channels used by HOME AGENT.

- The **-C** option allows you to designate CONVERSANT system channels for HOME AGENT use. The system prompts for the number of agents to be activated and which T1 and T/R channels will be used by the HOME AGENT scripts. (After you change the channels and restart the voice system, the table that associates scripts with CONVERSANT system ports is updated automatically. The table that contains agent information, however, must be updated manually to reflect the new valid HOME AGENT channels.)

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