

Lucent Technologies
Bell Labs Innovations



HOME AGENT

Application Trainer's/Supervisor's Guide 2

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- 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

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This document was prepared by the Product Documentation Development group, Lucent Technologies, Denver, CO.



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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.

Who Should Use This Guide?

This guide contains information for the person responsible for training and supervising home agents using the Automatic Call Distribution (ACD) HOME AGENT® application with any of 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.
- DEFINITY Communications System Generic 2.2, referred to as G2 systems or switches in this guide.

This guide assumes that the training of home agents will be done by their supervisor. If someone other than the home agent's supervisor does the training (perhaps a telecommunications administrator), both supervisor and trainer should read this entire guide.

Although the HOME AGENT application is nearly identical for DEFINITY G1, G2, G3, and ECS switches, when there is a difference, it is so noted.



CAUTION:

LUCENT TECHNOLOGIES ASSUMES NO RESPONSIBILITY FOR UNAUTHORIZED CALLS PLACED WHILE USING THE HOME AGENT APPLICATION. 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 Restriction

For DEFINITY G2 switches: Class of Restriction or Outward Calling Restriction

Related Resources

HOME AGENT Application Summary of Commands for Home Agents, 555-035-706

HOME AGENT Application Home Agent's Instructions, 555-035-705

HOME AGENT Application Installation and Operations, 555-035-501

Technical Help

If you have questions about UNIX, your CONVERSANT system, your switch, or its call center features, consult the appropriate documentation. If you cannot find answers to your questions in the documentation, call 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, G2, G3, and ECS switches. 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...

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Essential Concepts

1

The HOME AGENT trainer/supervisor must carefully read *HOME AGENT Application Home Agents' Instructions*, 555-035-705, to learn exactly how home agents are to use the HOME AGENT system. The trainer/supervisor should also read any documentation associated with agents' equipment.

The keys that home agents press to enter the various commands are shown in this guide in brackets with the number first, followed by the equivalent letter in parenthesis (where appropriate). For example, the **auto-in work mode** command keys are shown as [* 2 (* A)].

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.

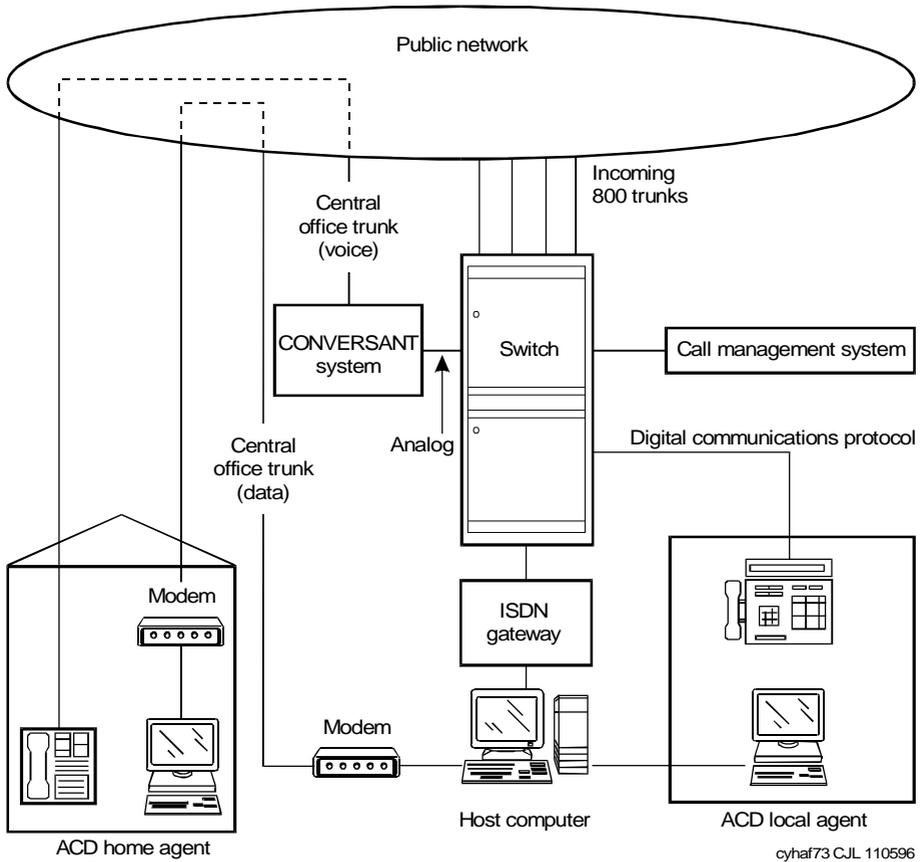


Figure 1-1. A Typical HOME AGENT Configuration

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 DEFINITY G1, G2, G3, or ECS switch. Via touch tones, home agents log into the CONVERSANT system and enter various commands. The CONVERSANT system translates these commands and sends 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 observe the performance of home agents as though they were local agents via the Call Management System (CMS). Home agents may be members of any split or skill hunt 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.

Purpose of Training Home Agents

Although it is very simple to use the HOME AGENT application, we recommend that before agents begin taking actual calls, they spend a considerable amount of time (perhaps four to eight hours, depending on their level of skill and knowledge) in training and practice. This training should happen *after* agents are thoroughly familiar and comfortable with all aspects of dealing with customers — what to say or not say, how to get further information, what to do under typical and unusual circumstances, etc.

After completing the training, home agents should:

- Understand how to set up and use the physical equipment they will be using. This equipment will include a telephone (any standard residential analog phone), and probably, a headset.
- Understand how to use HOME AGENT with this equipment.
- Be informed, practiced, and comfortable in using HOME AGENT and their equipment under a variety of circumstances.

NOTE:

It is very important that agents be comfortable with any situation that may occur since it is easy to become flustered when a customer is on the phone and the agent is alone at home, feeling

as though they do not have the direct support of a supervisor or other agents.

Training Guidelines

We suggest that:

- If the Automatic Call Distribution (ACD) supervisor of the home agents is not the person doing the training, the supervisor should be present for the training.
- For each home agent, the trainer should provide the following for the training session:
 - The guide, *HOME AGENT Application Home Agents' Instructions*, 555-035-705.

⇒ NOTE:

This guide should be read *before* the training session begins.

- The quick-reference card *HOME AGENT Application Summary of Commands for Home Agents*, 555-035-706.
- A sheet that lists the agent's own login ID and password, the agent's own extension number, the number the agent should dial to log into HOME AGENT, and any other numbers the agent may need, including the number of someone to call when the supervisor is not available.

⇒ NOTE:

Because home agents will be working alone at home, it is especially important that they be able to get in touch with their supervisor when they need to. Although they should first try to use the HOME AGENT **supervisor assistance** command [* 0], they should also know the number to dial if they have to use their own home phone. That number

does, of course, include the PBX extension, which they could use to call via the **place call** command [* 1 1].

- The headset (if any) the agent will be using
- Batteries (if any) the agent will be using
- Labels (typed or hand-written) if phones with programmable buttons will be used

Training Agenda

Providing Orientation

The trainer should tell the home agents what will happen during the training.

Reading Instructions

If home agents were not asked to read *HOME AGENT Application Home Agents' Instructions*, 555-035-705, before this session, allow time at this point for them to read it.

Reviewing and Discussing HOME AGENT

The trainer should give a brief review of the material covered in *HOME AGENT Application Home Agents' Instructions*, 555-035-705, and then facilitate a discussion of that material, being sure to answer any questions agents may have. It is important to emphasize the following:

- Once agents begin the login process, they should complete it.
- ***Agents should not enter commands too quickly***, but should wait until they hear an announcement confirming that the system has completed "working" on the previous command.

- Agents must clearly understand how to use the following commands to become familiar and comfortable in interactions with customers.

NOTE:

These commands are explained in greater detail in *HOME AGENT Application Home Agents' Instructions*, 555-035-705.

— **release command** [* 7 (* R)]

This command is used to disconnect the home agent from a caller.

— **recall command** [* 1 7 (* 1 R)]

This command is used to reconnect to a call that has been placed on hold or to drop a third party from a conference call while remaining connected to the caller.

This command is used *only* in conjunction with the **supervisor assistance** command [* 0], the **conference** command [* 1 2 (* 1 C)], or the **place call** command [* 1 1].

— **supervisor assistance** command [* 0]

This command lets the agent talk with the supervisor. If the agent enters the command while on an active call, HOME AGENT will automatically place the caller on hold and connect agent and supervisor. When the agent is ready to reconnect with the caller, the agent enters the **recall command** [* 1 7 (* 1 R)] so that HOME AGENT takes the caller off hold and adds the caller, as a third party, to the connection between supervisor and agent. The supervisor may hang up immediately, leaving the agent and the caller on the connection; or the supervisor may stay on the line and participate in the call.

— **conference** command [* 1 2 (* 1 C)]

This command is used to add a third party to an active call. After you dial the **conference** command [* 1 2 (* 1 C)], the recorded announcement asks you to dial the up-to-5-digit extension number of the party you wish to add to the call,

followed by the pound sign. If you make a mistake while pressing these digits, press [*] to erase all the digits you dialed; then dial the digits again, followed by [#].

If the third party answers, you are connected to that party while the caller waits. To add the caller to the connection between you and the third party, you must dial the **recall** command [* 1 7 (* 1 R)].

If the third party's extension is busy, a recorded announcement tells you so and HOME AGENT reconnects you to the original party.

— **place call** command [* 1 1]

This command is used to place a call. To place a call, press the **place call** command [* 1 1], wait for the dial tone, and dial the appropriate number followed by [#].

— **transfer** command [* 8 (* T)]

This command is used to transfer an active call to another extension. After the agent enters the **transfer** command [* 8 (* T)], the recorded announcement will ask the agent to enter the "transfer-to" extension number, followed by the pound sign. If the transferred-to party answers, the agent and the transferred-to party will be connected while the caller waits. To complete the transfer, the agent must enter the **release** [* 7 (* R)] command. If the transfer cannot be completed — because, for example, the transferred-to party's phone is busy — the announcement will tell the agent and HOME AGENT will reconnect agent and original party.

- Agents may enter the command for a mode change *while on a call*. For example, the agent might want to enter the **after call work (ACW) mode** [* 3] command while on a call because, if the agent waits to enter the command after releasing the call, in very busy situations HOME AGENT may send another call before the agent has a chance to enter the desired command. If the agent enters a mode-change command while on a call, there will be a moment when the agent and caller cannot hear each other. Therefore, the agent would want to say something like, "One

moment, please," before entering the command. The new mode will not take effect until the call is terminated. *When the call is finished, the agent should enter the **release** command [* 7 (* R)] to disconnect from the call.*

- Agents should keep in mind that until they become accustomed to working in HOME AGENT, they may want to use the **query** [* 1 3] command and the **release** [* 7 (* R)] command often as orientation aids.
- Home agents who have worked in an in-office call center, and may therefore be accustomed to being simultaneously logged into multiple splits, should be informed that as a home agent they can log into only one split at a time unless they are using a DEFINITY G3V3, G3V4, or ECS switch with Expert Agent Selection (EAS) enabled. If you are using that switch configuration, multiple skill groups are possible.
- Agents should be reminded that if they have trouble, they should consult the troubleshooting table in the back of *HOME AGENT Application Home Agents' Instructions*, 555-035-705.

Understanding Equipment

During training, home agents should have before them the phone that they will be using. The trainer must provide a detailed explanation of how to set up and use each phone.

If agents will be using a phone with speed-dial programmable memory, the trainer must step home agents through the process of programming the phone, so that if memory is lost, they will be able to restore it. It must be stressed that because memory can easily be accidentally lost, home agents must not rely on the labeled buttons (which should be regarded as being merely a convenience), but instead must be sure of how to directly enter commands using the 12-key dial pad. The trainer may label programmable buttons before the training session, or the agents may label their own phones as part of the training. In either case, the same labeling scheme should be used for all phones. Figure 2-1 shows a possible labeling scheme.

<input type="button" value="DIAL-IN"/>	<input type="button" value="SUPER ASSIST"/>	<input type="button" value="AUTO-IN"/>
<input type="button" value="LOGIN ID"/>	<input type="button" value="CONFERENCE"/>	<input type="button" value="MANUAL-IN"/>
<input type="button" value="PASSWORD"/>	<input type="button" value="TRANSFER"/>	<input type="button" value="ACW"/>
<input type="button" value="LOG OUT"/>	<input type="button" value="RECALL"/>	<input type="button" value="AUX"/>
<input type="button" value="PLACE CALL"/>	<input type="button" value="QUERY"/>	<input type="button" value="RELEASE"/>
<input type="button" value="PROG"/>	<input type="text"/>	<input type="button" value="LOWER"/>

phhalbl PDH 112096

Figure 2-1. Sample Button Labels for Home Agent's Phone

If any of the phones that home agents will be using has a display screen, it should be pointed out that although the display screen may look quite similar to the display screen of a digital phone (such as the CallMaster® Digital Voice Terminal typically used with in-office ACD call centers), the analog phone's display is only a convenience and will not provide ACD-related information. Consult the appropriate user manual about what information is displayed on a particular phone.

Similarly, any additional buttons or dials (perhaps mute buttons or volume-control dials) that may be present on any analog phone that home agents will be using must be explained. Again, consult the appropriate user manual for information about phone-specific buttons or dials.

If agents will be using a headset, the trainer should explain all aspects of its use, including plugging it into the phone.

Practicing Together

The trainer should lead the home agents through a series of practice calls, making every effort to simulate a real work session with situations that home agents are likely to encounter. During this exercise, agents should, at the very least, be required to:

- Log into HOME AGENT.
- State their availability to receive calls by placing themselves in the auto-in or manual-in work mode.
- Recognize the particular tone that indicates that an incoming call is waiting to be answered.
- Enter the **release** [* 7 (* R)] command to disconnect from a call.
- Place themselves in the after call work (ACW) mode.
- Use the **query** [* 1 3] command.
- Use the **help** [* 4 (* H)] command.
- Use the **supervisor assistance** command [* 0] to talk with the supervisor, and then use the **recall** command [* 1 7 (* 1 R)] to reconnect with the caller.
- Use the **transfer** command [* 8 (* T)] to transfer the caller to another extension.
- Use the **conference** command [* 1 2 (* 1 C)] to add a third party (other than the supervisor) to an active call. When the conference is in progress, use the **recall** command [* 1 7 (* 1 R)] to drop the third party from the call, continuing the conversation with the caller. In a scenario in which

the third party does not answer, use the **recall** command [* 1 7 (* 1 R)] to discontinue the ringing of the unanswered phone.

- Experience service observing.
- Enter the AUX mode to take a break.
- Use the **place call** command [* 1 1].
- Use the **malicious call trace** [* 1 6 (* 1 M)] command (G2 only)
- Conference AUDIX onto a call and go through an AUDIX login with Touch-Tone Passthru (TTPT).
- Complete the AUDIX session and disable TTPT.
- If on a G3V3 EAS, G3V4 EAS, or DEFINITY ECS EAS switch, add a skill.
- If on a G3V3 EAS, G3V4 EAS, or DEFINITY ECS EAS switch, remove a skill.
- Log out of HOME AGENT.

After completing this practice session, home agents should be sure, without being prompted, of what to do in all situations that are likely to occur.

Practicing at Home

Essentially, the trainer should make this practice session nearly identical to the previous one, except that agents will be doing the exercises from home. The purpose is to verify that the physical equipment is set up and working properly and to allow the home agents to become accustomed to using HOME AGENT on their own.

Supervising home agents is very similar to supervising local agents. Beyond the information presented in this guide and in *HOME AGENT Application Home Agents' Instructions*, 555-035-705, we offer the following notes:

- Because home agents will be working alone at home without your direct support or that of other agents, it is especially important that they be able to get in touch with you when they need to. Although they should first try to get you via the HOME AGENT **supervisor assistance** command [* 0], they should also know the number to dial if they have to use their own home phone. That number does, of course, include your PBX extension, which they could use to call you via the **place call** command [* 1 1]. You should be sure home agents also know whom to call if you are unavailable.
- Home agents can be members of any split. They can be added to a split that contains local agents or put into a split consisting entirely of home agents.

 **NOTE:**

With DEFINITY G1, G3, and ECS switches, a split number will be associated with each home agent's login ID, so the agent could log into a number of splits using the appropriate login ID. The agent could not, of course, be logged into more than one split at a time. With G2 switches, no split number is associated with the login ID. Instead, the extension from which the home agent dials in is administered on the switch as being a member of a particular

split. If, however, a switch with Expert Agent Selection (EAS) enabled is being used, multiple skill groups are possible.

- With DEFINITY G1, G3, and ECS switches, service observing of home agents is exactly the same as service observing of local agents. That is, a service observer logs directly into the switch and enters the feature access code (FAC) for service observing, followed by the extension to be observed.

With G2 switches, service observing of home agents differs slightly from service observing of local agents. To observe home agents with G2 systems, the supervisor must go through the CONVERSANT system and log in as an "agent" that is designated to be a service observer. (See *HOME AGENT Application Installation and Operations*, 555-035-501, for instructions on setting up an agent record for service observing.) The supervisor need only dial the CONVERSANT system extension, follow the prompts to log into the CONVERSANT system, and follow the prompts to enter the Automatic Call Distribution (ACD) extension of the home agent to be observed. See the HOME AGENT administrator for the CONVERSANT system extension and your login ID.

Once you have logged in as service observer through HOME AGENT on a G2 switch, and have identified the extension you are to observe, the system places you in a listen-only mode and you will immediately be able to hear. These are the commands you may use when observing:

- [* 4 (* H)] for help
 - [* 8 (* T)] to establish a two-way talk path
 - Once in 2-way talk mode, [* 7 (* S)] to return to listen-only mode.
 - [* 0] to terminate the service observing session
- To clear a home agent's ACD extension if the Call Management System (CMS) report shows "ringing no answer" on that line, call HOME AGENT and log in as that agent.
 - You should require that before home agents log out, they place themselves in the auxilliary (AUX) mode and then wait about 30 seconds before logging out. This is necessary because if a home agent happens

to be the last active agent in the split, they may continue to receive calls until the call queue is empty. Calls will not be added to the queue after the home agent enters the **auxiliary (AUX) mode** command [* 9 (* X)] and it has been processed.

- Sometimes, immediately after a successful login has been confirmed by a voice announcement, the agent logging in may hear a short burst of re-order tone. This is of no consequence; the agent should proceed as usual.
- Under certain conditions, it is possible for the PBX and the CONVERSANT system to disagree on the state of an ACD connection. For example, the PBX may consider an agent to be logged in, while the CONVERSANT system may have cleared the call state for that particular agent. This could easily occur if the CONVERSANT system goes down without warning. In that case, any affected voice channel in the CONVERSANT system would be unusable. The final result of this problem is that touch-tone commands entered by an agent associated with an affected voice channel would have no meaning, and any subsequent attempts by the agent to log in or out would fail.

A solution for this problem is to bridge each of the PBX ACD lines used by your HOME AGENT system to a line appearance on a Lucent Technologies (previously AT&T) digital voice terminal with enough line appearances for your agents (more than one voice terminal may be needed). When a channel appears to be in an unusual state, that is, when calls are not being routed to a particular agent or no feedback is being given to the home agent upon entering touch-tone commands — as a supervisor in the call center, you can intervene on the line appearance that corresponds to that particular agent and attempt to key in the appropriate feature-access code for logging the agent out. If the PBX accepts the code, you will hear a confirmation tone, and the home agent should then be able to dial in and start over. If you do not hear the confirmation tone, contact your PBX or CONVERSANT system administrator.

- It is important for the supervisor to understand that home agents can have three phone numbers: the ACD PBX extension (this number appears on CMS reports), a business line number (the regular 7- or 10-digit central-office number for the line installed at the agent's home

for using HOME AGENT), and the number for the home agent's home phone. To find these numbers easily, you may want to make a table like this one:

Agent's Name	PBX Extension	Business Line	Home Phone
Jane Jones	xxxx	xxx-xxxx	xxx-xxxx
Bob Smith	xxxx	xxx-xxxx	xxx-xxxx

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