



**INTUITY™ CONVERSANT® System**  
Agent Assist User Guide

585-310-597  
Comcode 108599929  
Issue 3  
December 1999

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INTUITY CONVERSANT System Agent Assist User Guide  
**585-310-597, Issue 3, December 1999, Comcode 108599929**

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## About This Document

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### Purpose

This document, *INTUITY™ CONVERSANT® System Agent Assist User Guide*, 585-310-597, provides administrative details about the functions of the Agent Assist System Software Version 2.8 applications. This document includes:

- an overview of the Agent Assist applications
- instructions to install the Agent Assist software
- descriptions and instructions for the administrative functions
- instructions to use the individual Agent Assist applications
- guidelines for troubleshooting the Agent Assist software

### Intended Audiences

The primary audiences for this document are individuals responsible for administering telecommunications and desktop applications in the Call Center environment. Some sections may be applicable for Agents and Call Center Supervisors as a User Manual to describe feature operations. Care should be taken to control the distribution of the Administration portions of this manual to protect from unauthorized access of system administration capabilities.

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## **How to Use This Document**

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This document is designed to step you through the installation and administration process.

### **To Locate Specific Topics**

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This document includes an alphabetical index at the end for quick access to specific topics.

## **Conventions Used in This Document**

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This section describes the conventions used in this document.

### **Terminology**

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- The word “type” means to press the key or sequence of keys specified. For example, an instruction to type the letter “y” is shown as  
Type **y** to continue.
- The word “enter” means to type a value and then press **ENTER**. For example, an instruction to type the letter “y” and press **ENTER** is shown as  
Enter **y** to continue.

- The word “select” means to move the cursor to the desired menu item and then press `ENTER`. For example, an instruction to move the cursor to the start test option on the Network Loop-Around Test screen and then press `ENTER` is shown as

Select Start Test.

## Terminal Keys

- Keys that you press on your *terminal or PC* are represented as rounded boxes. For example, an instruction to press the enter key is shown as
- Two or three keys that you press at the same time on your *terminal or PC* (that is, you hold down the first key while pressing the second and/or third key) are represented as a series of separate rounded boxes. For example, an instruction to press and hold `ALT` while typing the letter “d” is shown as

Press `ENTER`.

Press `ALT` `D`.

- Function keys on your terminal, PC, or system screens, also known as *soft keys*, are represented as round boxes followed by the function or value of that key enclosed in parentheses. For example, an instruction to press function key 3 is shown as

Press `F3` (Choices).

- Keys that you press on your *telephone keypad* are represented as square boxes. For example, an instruction to press the first key on your telephone keypad is shown as

Press `1` to record a message.

## Screen Displays

- Values, system messages, field names, and prompts that appear on the screen are shown in typewriter-style `constant-width` type, as shown in the following examples:

### Example 1:

Enter the number of ports to be dedicated to outbound traffic in the Maximum Simultaneous Ports field.

### Example 2:

Alarm Form Update was successful.

Press <Enter> to continue.

- The sequence of menu options that you must select to display a specific screen or submenu is shown as follows:

Start at the Main Menu and select

```
> Customer/Services Administration
```

```
> Alarm Management
```

In this example, you would access the Main Menu and select the Customer/Service Administration menu. From the Customer/Service Administration menu, you would then select the Alarm Management screen.

## Typography

---

- Commands and text you type in or enter appear in **bold** type, as in the following examples:

Example 1:

Enter **change-switch-time-zone** at the `enter` command: prompt.

Example 2:

Type **high** or **low** in the `Speed:` field.

- Command variables are shown in ***bold italic*** type when they are part of what you must type in and *regular italic* type when they are not, for example

Enter **ch ma *machine\_name***, where *machine\_name* is the name of the call delivery machine you just created.

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---

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 **WARNING:**

*Indicates the presence of a hazard that if not avoided can cause death or severe personal injury.*

 **DANGER:**

*Indicates the presence of a hazard that if not avoided will cause death or severe personal injury.*

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## **Overview**

---

This chapter provides an overview of the Agent Assist system software for the INTUITY CONVERSANT system.

## **Purpose**

---

The purpose of this chapter is to familiarize you with the Agent Assist system software including:

- Applications
- Software architecture
- Hardware and software requirements

## **Agent Assist System Software**

---

The Agent Assist system software is comprised of five applications that record scheduled or on-demand recordings and other audio sessions using the INTUITY CONVERSANT system as a call processing/recording server. A Windows™ client personal computer (PC) serves as the application administration and activation tool.

## Recording Types and Applications

### Scheduled Recordings

Scheduled recordings are assigned at some point prior to the actual session. When the time for the scheduled recording is reached, the INTUITY CONVERSANT system automatically bridges onto the conversation and records the call for a preset time interval as administered by the user.

The Agent Assist applications that record on a scheduled basis are:

- **Agent Observing (AO)** — This application provides continuous audio recording of call center agent conversations over a defined interval of time. Recording takes place at the scheduled start time, regardless of agent call disposition, and terminates when selected length has been reached.

See Chapter 4, “Agent Observing”, for more information on administering and using the Agent Observing application.

- **Customer Experience Observing (C.E.O.)** — This application allows a supervisor to schedule recordings of an entire call from the time the caller enters the call center until the call is disconnected for a predetermined time period. As opposed to recording the conversations specific to an agent, C.E.O. records all audio sessions the caller hears while on the vector directory number (VDN) of the DEFINITY switch. These audio sessions can include:

- Switch recorded announcements
- Music
- Voice response interactions
- Agent conversations
- Transferred and conference call conversation
- Progress tones such as busy, reorder, and ringing
- Switch call prompts and associated caller input

See Chapter 6, “Customer Experience Observing” for more information on administering and using the C.E.O. application.

### On-Demand Recordings

On-demand recordings begin immediately upon activation from the Windows client PC. Once the application is activated, the Intuity CONVERSANT system bridges onto the call and records until the client PC stops the recording.

The Agent Assist applications that record on an on-demand basis are:

- **Malicious Call Recording (M.C.R.)** — This application allows the agent to immediately record a conversation. The agent's conversation continues to be recorded until terminated by the agent. The agent can also add text notes to the recording during the conversation for later retrieval. See Chapter 5, "Malicious Call Recording", for more information on administering and using the M.C.R. application.
- **Spontaneous Telephony Agent Recording (S.T.A.R.)** — This application also allows the agent to immediately record a conversation. With S.T.A.R., however, the agent can enter data during the conversation into ten (10) free form text fields for later retrieval. See Chapter 7, "Spontaneous Telephony Agent Recording (S.T.A.R.)", for more information on administering and using the S.T.A.R. application.
- **AgentNow!** — This application is similar to Malicious Call Recording with one significant exception; the Supervisor initiates the recording. A Supervisor may record conversations of agents assigned to them on an on-demand basis. See Chapter 8, "AgentNow!" for more information on administering and using the AgentNow! application.

### Agent Assist Application Processes

The basic Agent Assist application processes are:

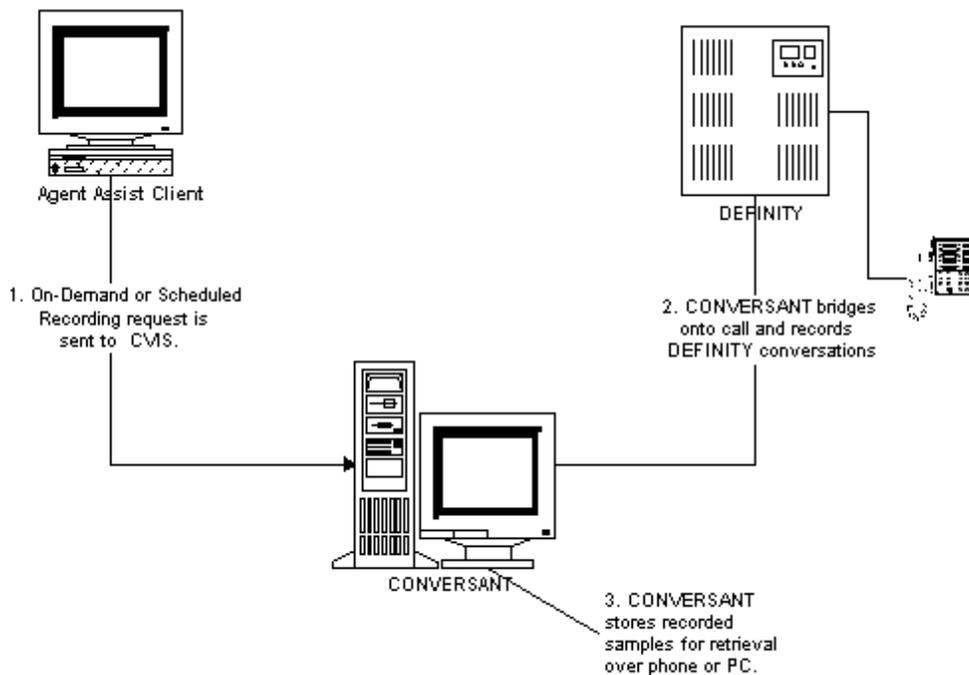
- **Application activation/administration** — This initial step involves the establishment of a "begin recording" notification to be set within the Intuity CONVERSANT system. When one of the on-demand applications is launched, such as S.T.A.R., the Intuity CONVERSANT system collects the appropriate user information and bridges on to the conversation. Scheduled recording involves administering a stop/start date and time into a schedule form. These activities are then sent to the Intuity CONVERSANT system. Many of the administrative functions are accomplished through the Port Manager and the Administrator applications.
- **Recordings** — The Intuity CONVERSANT system receives an indication to record (either on-demand or when the scheduled time is reached) and bridges onto the DEFINITY switch call connections. Depending on the Agent Assist application, the INTUITY CONVERSANT system collects audio samples based on the voice terminal extension or vector directory number (VDN). When recording is based on voice terminal, only the audio conversation taking place from that specific telephone is recorded.  
  
When recording on a VDN basis, all audio portions occurring during the call, regardless of any terminating voice terminals, is captured in the sample. Only the C.E.O. application records on a VDN basis.
- **Recordings retrieval** — Audio recordings are stored on the INTUITY CONVERSANT system for later retrieval. Using the Agent Assist Recording Retriever application, you can:
  - Retrieve and play the recording on the PC

- Save the recording from the INTUITY CONVERSANT system to another storage location such as a floppy diskette or alternative directory on another server

## Software Architecture

---

A client-server architecture is used to administer, activate, and maintain the Agent Assist features (Figure 1).



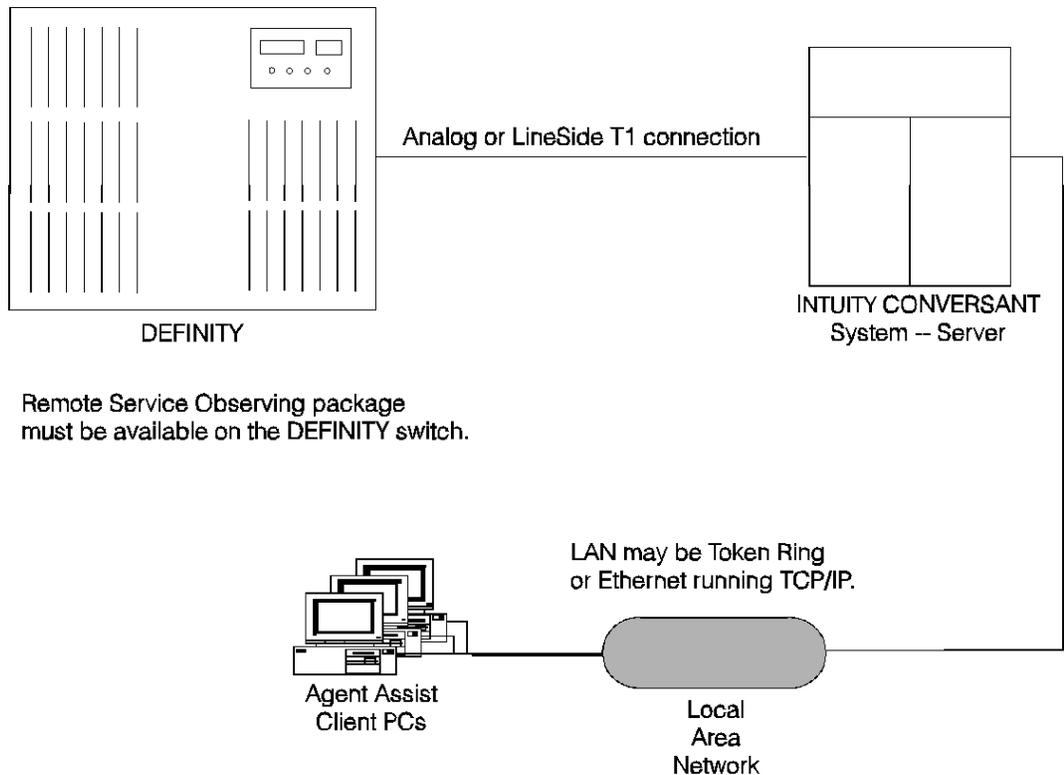
---

**Figure 1. Client-Server Architecture**

## Network Architecture

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The Agent Assist software uses a local area network configuration, either Token Ring or Ethernet running TCP/IP, to communicate with the INTUITY CONVERSANT system. TCP/IP connectivity must exist between the clients and INTUITY CONVERSANT system to administer and use the Agent Assist applications. Figure 2 depicts a typical network configuration required by the Agent Assist software.



**Figure 2. Agent Assist Network**

## **Hardware and Software Requirements**

The section describes the basic hardware and software requirements for both the INTUITY CONVERSANT system server and the Windows client PC.

### **Server Hardware and Software Requirements**

The following is required to install the INTUITY CONVERSANT Agent Assist System software:

- Lucent Technologies platform; MAP/5P, MAP/40P, or MAP/100P
- INTUITY CONVERSANT System
- Analog telephone network connection
- Local area network connection, Ethernet running TCP/IP

## Client PC Hardware and Software Requirements

- PC running Windows 95/98 or Windows NT 4.0 or higher
- Multimedia capable PC

 **NOTE:**

If using Windows NT 4.0 you must have the latest service packs. If during installation you receive the message the service packs have not been applied, you must download Service Pack 3 for the proper machine. For example, if you have a Windows NT Workstation, you need to download Service Pack 3 for Windows NT Workstations. The service packs can be found at <http://www.microsoft.com/NTworkstation>. This location could change; please check with Microsoft for location.

---

## Software Installation

# 2

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### Overview

---

This chapter describes the procedure needed to install the Agent Assist system software on both the server and the client machines.

### Purpose

---

The purpose of this chapter is to describe the server and client PC installation procedures for Agent Assist.

## Agent Assist System Software Installation

---

One software component resides on the Lucent Technologies INTUITY CONVERSANT System (server). The other component resides on a desktop personal computer (client) running Microsoft Windows 95/98 or Windows NT 4.0 operating system.

### Agent Assist Application

---

The following must be configured on the Intuity CONVERSANT system to install Agent Assist.

- Pipeline Server 2.7 or later – This package must be installed first
- Agent Assist

### Installing Pipeline Serve

1. Login to the CONVERSANT as **root**
2. At the command line, enter **pkgadd -d diskette1 pipeline**

The system displays the following message:

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

3. Insert the Pipeline Server installation diskette labeled 1 of 2 in the floppy drive.
4. Press Enter.

The system displays messages similar to the following:

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

```
PROCESSING:
```

```
Package: CenterPoint Solutions Pipeline (c) Server V2.8  
(pipeline)  
from <diskette1>.
```

```
CenterPoint Solutions Pipeline (c) Server V2.8  
(i486) 2.8
```

```
Using </> as the package base directory.
```

```
CenterPoint Solutions, Inc.
```

```
## Processing package information.
```

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

```
Installing CenterPoint Solutions Pipeline (c) Server  
V2.8 as <pipeline>
```

```
## Executing preinstall script.
```

```
New install.
```

```
Stopping any running components... Stopped.
```

```
## Installing part 1 of 2.  
/etc/conf/init.d/CS4I0pipeline  
/usr/add-on/centerpoint/bin/impdrop.sql  
/usr/add-on/centerpoint/bin/plserver  
/usr/add-on/centerpoint/bin/plsvrstart  
/usr/add-on/centerpoint/bin/plsvrstop  
/usr/add-on/centerpoint/bin/services  
/vs/bin/util/shutdown/plsvrstop
```

```
## Installing part 2 of 2.
```

Then, the system displays the following message:

```
Insert diskette 2 of 2 for <pipeline> package into  
Floppy Drive 1.
```

```
Type [go] when ready,  
or [q] to quit: (default: go)
```

5. Insert the Pipeline Server installation diskette labeled 2 of 2 in the floppy drive.

6. Press Enter.

The system displays messages similar to the following:

```
/usr/add-on/centerpoint/bin/plserverV6  
[ verifying class <plfiles> ]  
## Executing postinstall script.
```

```
/
The version of the vs package is i.3
Installation for Conversant V7 ...

-- establishing files for Conversant V7

Creating database tables...Done.

Adding service entries...
Starting Pipeline (c) Server

Started

CenterPoint Solutions, Inc. Pipeline (c) Server

Installation of CenterPoint Solutions Pipeline (c)
Server V2.8
(pipeline) was successful.
```

### Installing Agent Assist

1. Login to the CONVERSANT as **root**.
2. Enter **pkgadd -d diskette1 agtasstc**  
The system displays the following message:  
Insert diskette into Floppy Drive 1.  
Type [go] when ready,  
or [q] to quit: (default: go)
3. Insert the Agent Assist installation diskette 1 of 4 in the floppy drive.
4. Press Enter.

The system displays messages similar to the following:

Installation in progress. Do not remove the diskette.

PROCESSING:

Package: CenterPoint Solutions AgentAssist Recorder  
V2.8 (agtasstc)

from <diskettel>.

CenterPoint Solutions AgentAssist Recorder V2.8

(i486) 2.8

Using </> as the package base directory.

## Processing package information.

## Processing system information.

## Verifying package dependencies.

## Verifying disk space requirements.

Installing CenterPoint Solutions AgentAssist Recorder  
V2.8 as <agtasstc>

## Executing preinstall script.

New installation.

Stopping any running processes... Stopped.

## Installing part 1 of 4.

PROCESSING:

Package: CenterPoint Solutions AgentAssist Recorder  
V2.8 (agtasstc)

from <diskettel>.

CenterPoint Solutions AgentAssist Recorder V2.8

(i486) 2.8

Using </> as the package base directory.

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

Installing CenterPoint Solutions AgentAssist Recorder
V2.8 as <agtasstc>

## Executing preinstall script.
New installation.

Stopping any running processes... Stopped.
## Installing part 1 of 4.
/usr/add-on/centerpoint/agentassist/bin/plrecord
/usr/add-on/centerpoint/agentassist/bin/plrecstart
/usr/add-on/centerpoint/agentassist/prompts/1000
/usr/add-on/centerpoint/agentassist/prompts/1001
/usr/add-on/centerpoint/agentassist/prompts/1005
/usr/add-on/centerpoint/agentassist/prompts/1006
/usr/add-on/centerpoint/agentassist/prompts/1007
/usr/add-on/centerpoint/agentassist/prompts/1011
/usr/add-on/centerpoint/agentassist/prompts/1012
/usr/add-on/centerpoint/agentassist/prompts/1101
/usr/add-on/centerpoint/agentassist/prompts/7500
/usr/add-on/centerpoint/agentassist/prompts/7501
/usr/add-on/centerpoint/agentassist/prompts/7502
/usr/add-on/centerpoint/agentassist/prompts/7504
/usr/add-on/centerpoint/agentassist/recordings
<symbolic link>
## Installing part 2 of 4.
```

Then, the system displays the following message:

```
Insert diskette 2 of 4 for <agtasstc> package into  
Floppy Drive 1.
```

```
Type [go] when ready,
```

```
or [q] to quit: (default: go)
```

5. Insert the Agent Assist installation diskette 2 of 4 in the floppy drive and press Enter.

The system displays messages similar to the following:

```
/usr/add-on/centerpoint/agentassist/prompts/1008
```

```
/usr/add-on/centerpoint/agentassist/prompts/1009
```

```
/usr/add-on/centerpoint/agentassist/prompts/1010
```

```
/usr/add-on/centerpoint/agentassist/prompts/1100
```

```
/usr/add-on/centerpoint/agentassist/prompts/1106
```

```
/usr/add-on/centerpoint/util/aaclean
```

```
## Installing part 3 of 4.
```

Then, the system displays the following message:

```
Insert diskette 3 of 4 for <agtasstc> package into  
Floppy Drive 1.
```

```
Type [go] when ready,
```

```
or [q] to quit: (default: go)
```

6. Insert the Agent Assist installation diskette 3 of 4 in the floppy drive and press Enter.

The system displays messages similar to the following:

```
/etc/conf/init.d/CS4I1agtassta
```

```
/usr/add-on/centerpoint/agentassist/bin/plrecord.V6
```

```
/usr/add-on/centerpoint/agentassist/bin/plrecstop
```

```
/usr/add-on/centerpoint/agentassist/bin/tablefix.sh
```

```
/usr/add-on/centerpoint/agentassist/bin/tablefix.sql
```

```
/usr/add-on/centerpoint/agentassist/bin/tablefix.txt
```

```
/usr/add-on/centerpoint/agentassist/prompts/1102
```

```
/usr/add-on/centerpoint/agentassist/prompts/1103
```

```
/usr/add-on/centerpoint/agentassist/prompts/1104
```

```
/usr/add-on/centerpoint/agentassist/prompts/1105
```

```
/usr/add-on/centerpoint/agentassist/prompts/1200
```

```
/usr/add-on/centerpoint/agentassist/prompts/1201
```

```
/vs/bin/util/shutdown/plrecstop
```

```
## Installing part 4 of 4.
```

Then, the system displays the following message:

```
Insert diskette 4 of 4 for <agtasstc> package into  
Floppy Drive 1.
```

```
Type [go] when ready,
```

```
or [q] to quit: (default: go)
```

7. Insert the Agent Assist installation diskette 4 of 4 in the floppy drive and press Enter.

The system displays messages similar to the following:

```
/usr/add-on/centerpoint/util/aaclean.V6
```

```
[ verifying class <afiles> ]
```

```
## Executing postinstall script.
```

```
/
```

```
The version of the vs package is i.3
```

```
Installation proceeding for Conversant V7 ...
```

```
-- establishing files for Conversant V7
```

```
Creating database tables...Done.
```

```
Check tables...
```

```
Starting Pipeline (c) Server
```

```
Started
```

```
Starting Agent Assist (c) Recorder
```

```
Started
```

```
CenterPoint Solutions, Inc. AgentAssist
```

```
Installation of CenterPoint Solutions AgentAssist  
Recorder V2.8 (agtasstc) was successful.
```

## Client PC Software Installation

---



### **WARNING:**

*The individual applications will not perform properly if the Agent Assist System software is not installed on the target server.*

The client software may be installed on a PC with either the Windows 95/98 or Windows NT 4.0 operating systems.

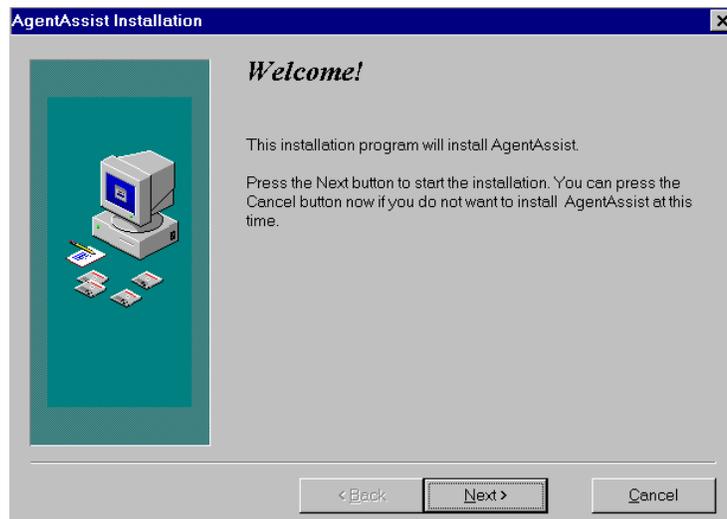
Use the procedure below to install the Agent Assist System software on the client PC:

1. Insert the diskette labeled "Agent Assist Windows Client, Disk 1 of 3" into floppy disk drive of the PC.
2. For Windows 95/98 or Windows NT 4.0 — Starting at the desktop, select Run from the Start menu.

The system responds with the Run window.

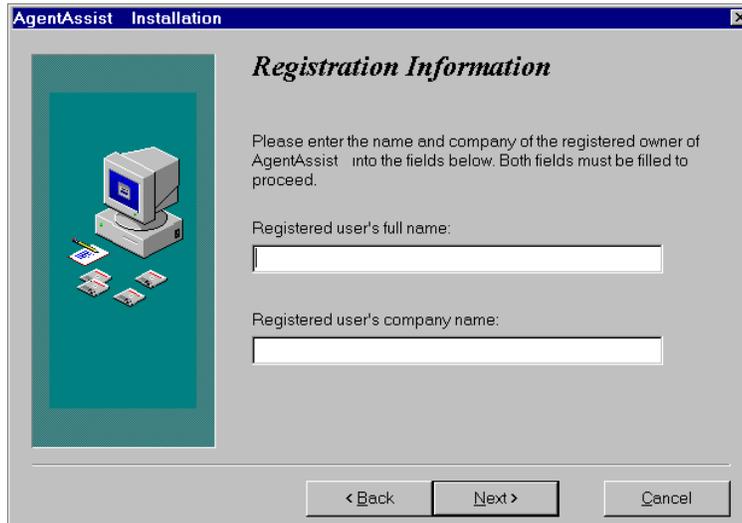
3. Type **a:\setup** in the Command Line field.
4. Click the OK button and follow the instructions on the screen.

The system displays the initial installation screen that provides a welcome and some basic instructions.



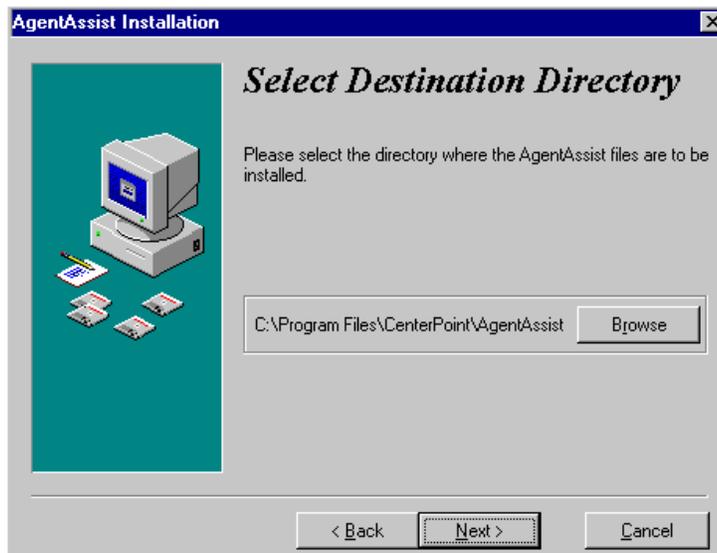
5. Click the Next button to continue.

The system displays the Registration screen.



6. Type the user name in the Registered User's full name field.
7. Type the company name in the Registered User's company name field.
8. Click the Next button to continue.

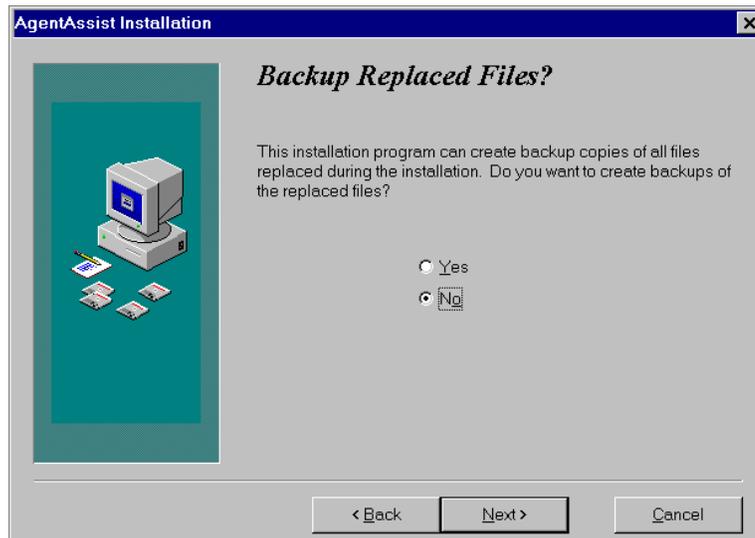
The system displays the Select Destination Directory screen.



9. Click the Next button to accept the default directory and continue.

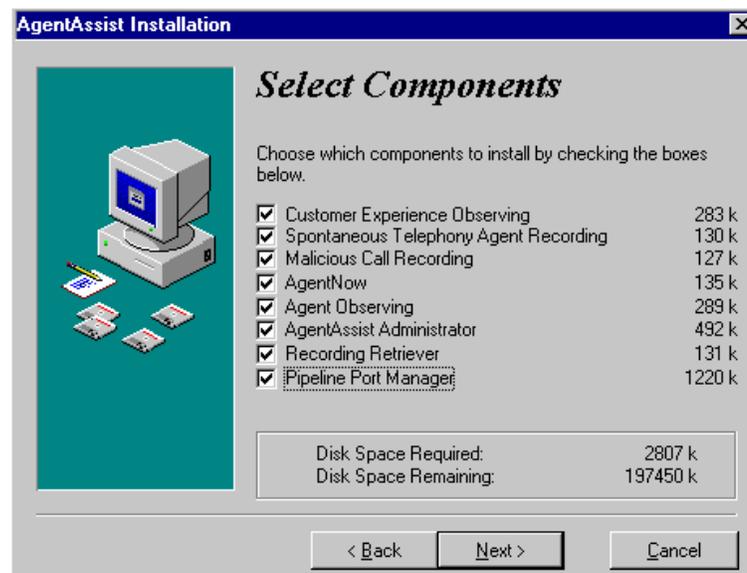
To select a new directory, either enter a directory in the field or click the Browse button to select a different directory. Click the Next button to continue.

If you have a previously installed version of Agent Assist, the installation process prompts to see if you want to backup your older files and displays the Backup screen.



10. If you would like to backup your older files, select yes.
11. Click the Next button to continue.

After selecting the directory and backing up older files (if applicable), you have the option of selecting the Agent Assist applications to install. The system displays the Select Components screen.



**⇒ NOTE:**

If you are installing S.T.A.R., Malicious Call Recording, or AgentNow! as the only application, you must also install the Recording Retriever in order to retrieve the recordings with the PC.

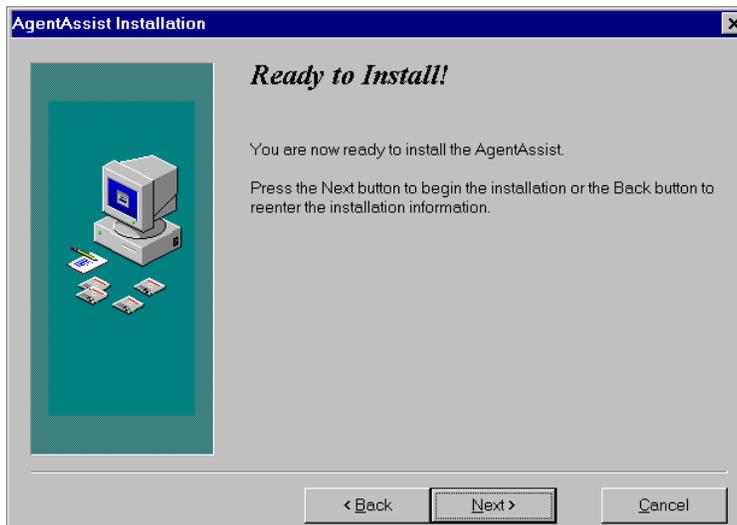
**⇒ NOTE:**

The five applications are licensed separately and may be sold individually or as a bundle. The other three applications, the Administrator, Recording Retriever and Port Manager are shipped with all applications. One of these must be installed on a client to setup and administer Agent Assist.

The amount of hard disk space required is shown on this screen. If enough hard disk space is not available to install the selected components, Agent Assist will halt the installation. At this point, you must either free some hard disk space or reduce the number of selections you wish to install on the PC.

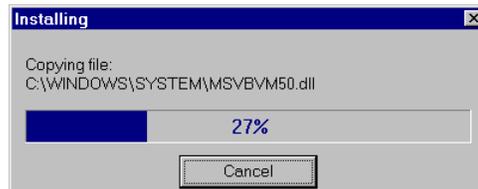
12. Select the Agent Assist applications to install.
13. Click the Next button to continue.

The system displays the Ready to Install screen.



14. Click the Next button to continue.

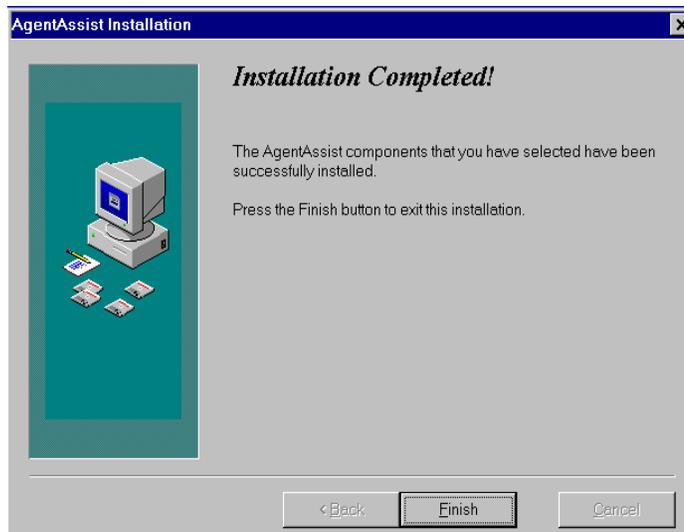
The system displays a progress bar, indicating that the Agent Assist applications are installing.



Click the Cancel button if you wish to halt the installation.

The installation program prompts you to insert the second and then the third disk.

When the software has finished installing successfully, the system displays the Installation Complete screen.



15. Press the Finish button to complete the installation procedure.

The Agent Assist features are now added to your Start/Program/CenterPoint Solutions menu.

**⇒ NOTE:**

Remember to read the README.TXT file for important information regarding the software. This file also contains installation details for manually configuring the SERVICES file for Windows 95/98 and Windows NT 4.0.

## Uninstall the Agent Assist Software

---

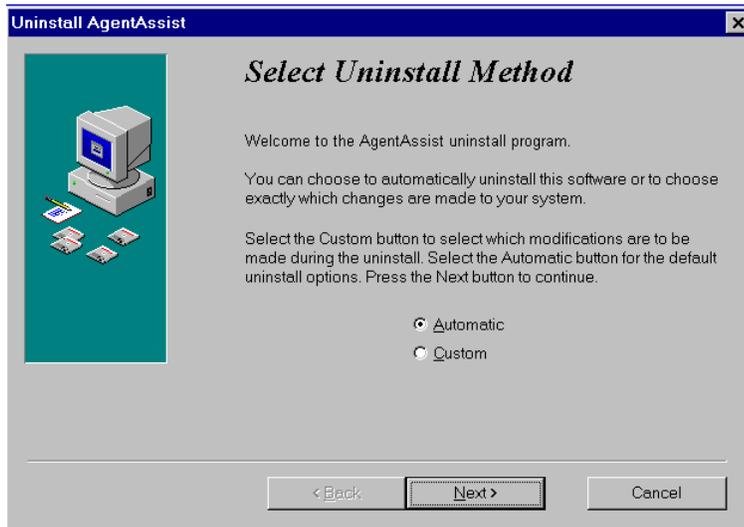
### Uninstall from the Client

---

Use the procedure below to uninstall the Agent Assist System software from the client PC:

1. From the Start menu, select Settings.
2. Select Control Panel.
3. Select Add/Remove Programs.
4. Select AgentAssist from the list and click on Add/Remove.

The system displays the Select Uninstall Method screen.



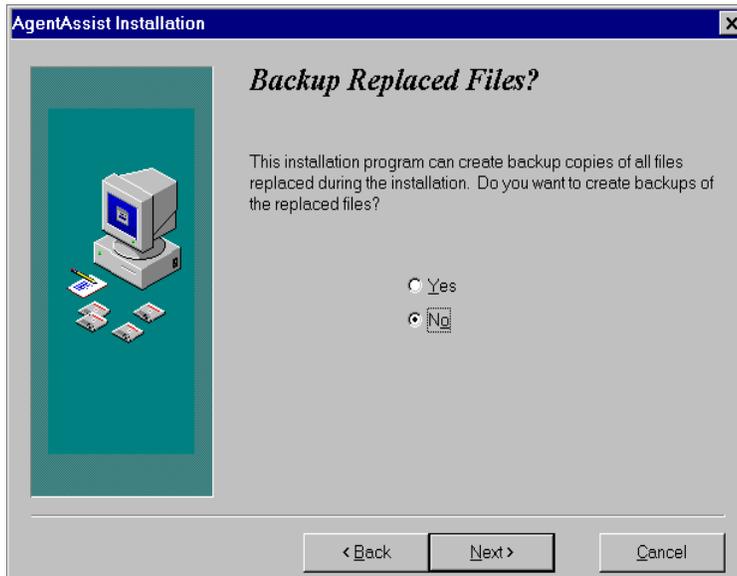
5. Select Automatic or Custom for the deletion process.

You should use the automated process unless you want to remove application files manually.

6. Click the Next button to continue.

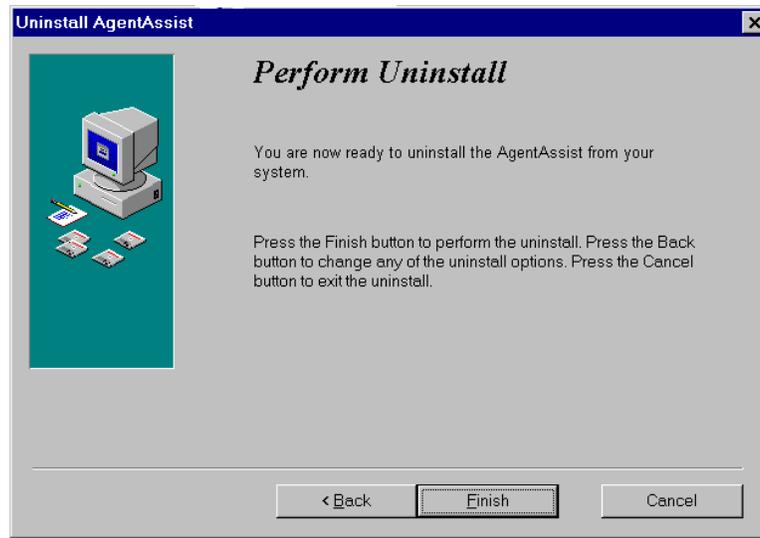
If you chose to perform a backup of older Agent Assist files during the installation of the Agent Assist software, the system displays the Perform Rollback screen.

Skip to Step 8 if you do not see the Perform Rollback screen.



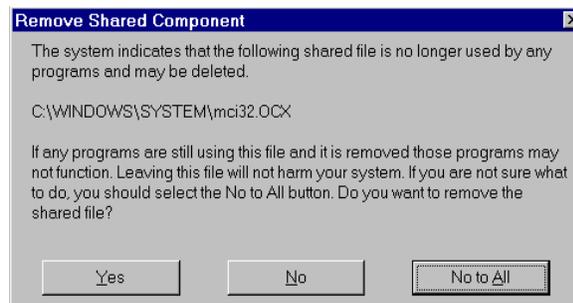
7. Select yes if you want the Agent Assist uninstall program to restore the older version of the Agent Assist files that were backed up during the install program.
8. Click the Next button to continue.

The system displays the Perform Uninstall screen to confirm the uninstall request.



9. Click the Finish button to perform the uninstall.

The system displays the following message as it removes the software:



10. This file should have no adverse effect if left on your PC. If you are not sure if you should remove this file, select the default choice of No to All.

When the uninstall program is finished, the Agent Assist folder and all associated icons and software are removed from your PC.

### Uninstall Agent Assist from the CONVERSANT

1. Login to the CONVERSANT as "root"
2. Enter **pkgrm agasstc**

The system displays the following message:

The following package is currently installed:

```
agtasstc   CenterPoint Solutions AgentAssist Recorder
           V2.8 (i486) 2.8
```

Do you want to remove this package [yes,no,?,quit]

**3. Enter y**

If the software is successfully removed, the system displays the following message:

```
Removal of <agtasstc> was successful.
```

**4. Enter `pkgrm pipeline`**

The system displays the following message:

The following package is currently installed:

```
pipeline   CenterPoint Solutions Pipeline (c) Server
           V2.8 (i486) 2.8
```

Do you want to remove this package [yes,no,?,quit]

**5. Enter y**

If the software is successfully removed, the system displays the following message:

```
Removal of <pipeline> was successful.
```

**Overview**

---

This chapter describes the Agent Assist server and client administration aspects and the associated procedures. The client PC is used to perform all Agent Assist administrative functions.

**Purpose**

---

The purpose of this chapter is to provide administrative information and procedures for the Agent Assist System software.

Agent Assist administration is comprised of two aspects: server administration and client PC administration.

## Server Administration

---

### Ports Usage

---

When the Intuity CONVERSANT system recognizes a command to perform an audio recording, the system searches for a valid port that is currently not processing a call. If the port is not busy, the Agent Assist application seizes the port for the duration of the recording session.

#### NOTE:

You do not physically assign the applications to the ports as you would with a traditional system voice response application. Applications are activated in a background process. This is commonly referred to as “sharing” system ports.

### Port Contention Rules

Since the five Agent Assist applications contend for available assigned ports on the INTUITY CONVERSANT system, the following priority is applied in the event ports are not available to process the recording requests:

- Malicious Call Recording — high priority (0)
- AgentNow! — highest priority (1)
- S.T.A.R. — medium priority (2)
- Agent Observing — low priority (3)
- C.E.O. — lowest priority (4)

The highest priority application (Malicious Call Recording) takes precedence on all ports. For example, if a port is not available when Malicious Call Recording is activated because another Agent Assist recording is in progress, M.C.R. takes priority over the other recording application. M.C.R. takes the port and begins recording.

Some general port contention rules are:

- Agent Assist applications do not take over or interrupt an application that is assigned to a INTUITY CONVERSANT system port. Only other Agent Assist recording requests may be terminated by a higher priority recording request.
- A scheduled recording request may be stopped to allow recording to begin when a supervisor or an agent requests an “on-demand” recording and no ports are available.

## Port Manager

The Port Manager is provided for server and switch integration administration.

Use the procedure below to access the Port Manager:

1. Windows NT and Windows 95/98: From the Start menu, select Programs.  
The system displays the list of Program folders.
2. Select CenterPoint Solutions.
3. Select Port Manager.

The system displays the administration login window.



**⇒ NOTE:**

Only the Administrator is allowed access to these menus. After the initial login, the system automatically displays the Username and Password.

4. In the Server field, select or type a server from the drop-down menu. The systems listed are those connected through the local area network.  
Click on the Search button to search the network for available server(s). Use the Server drop-down menu to select listed available server(s).



**⇒ NOTE:**

The local subnet is found only on your messaging system. Also, only those Intuity CONVERSANT systems with Agent Assist software loaded are displayed.

5. In the Password field, type the administrator's password.  
The default password for the administrator is **"1234"**.

**⇒ NOTE:**

It is recommended that you change the administrator password and store it in a secure location. See "Change Administrator Password" on page 3-52.



6. Click on the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The system displays the Port Manager window.



## Server Settings

The Server Settings main folder provides an overview details screen, listing the current server name, IP address and protocol version and the user identity.

There are three sub-folders within the Server Settings folder, which control port assignments, dialing options, and licensing information. These settings are used by other applications sharing this server, and must be set before using any server applications.

To view Server Settings overview details:

1. Click on the Server Settings folder.

The system displays the Server Settings window.



### Backup Agent Assist Files

Use the procedure below to backup Agent Assist files:



1. Place a blank tape in the INTUITY CONVERSANT server.
2. Click on the Backup button. The system will run a backup of the Agent Assist files on the server.
3. When this procedure is complete, remove tape from server.

**⇒ NOTE:**

This procedure will only backup the INTUITY CONVERSANT Agent Assist files. It will not backup the Agent Assist client PC. To backup the client side PC please see your network administrator.

### Restore Agent Assist Files

Use the procedure below to restore Agent Assist files:



1. Place the tape containing the desired backup in the CentreVu Messenger/CONVERSANT server.
2. Click on the Restore button to restore the data from the tape.

**⇒ NOTE:**

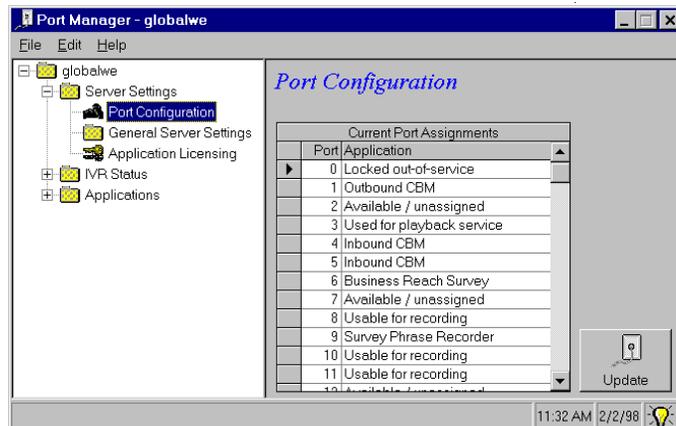
If you restore from a backup with data from the previous day, all data entered for the current day will be lost.

### Port Configuration

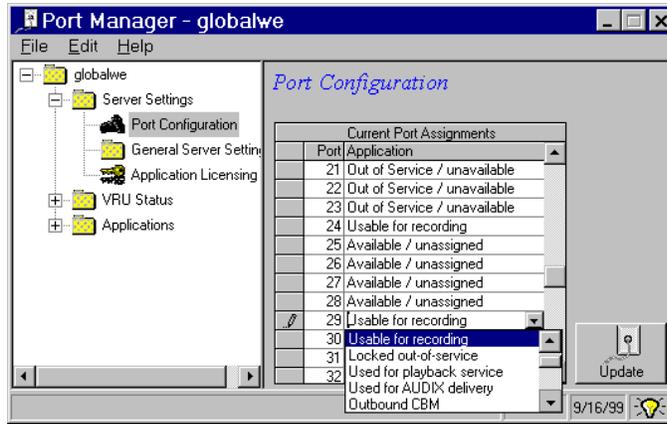
This dialog box assigns a use for each available port on your system.

Use the procedure below to set port assignments:

1. Click on Port Configuration sub-folder of Server Settings folder. The following screen is displayed:



- Click on the port number you wish to change. A drop down menu of assignment options are displayed:



- Click on desired assignment (scroll to view all assignment options).

The following list describes each port status:

- Usable for recording — used for Agent Assist recordings
- Locked out-of-service — not available
- Used for playback service — used to dial into the Intuity CONVERSANT system and retrieve recordings via the telephone.

**⇒ NOTE:**

Select one of the port assignments listed above for Agent Assist. The port assignments listed below are used for other applications and do not pertain to Agent Assist.

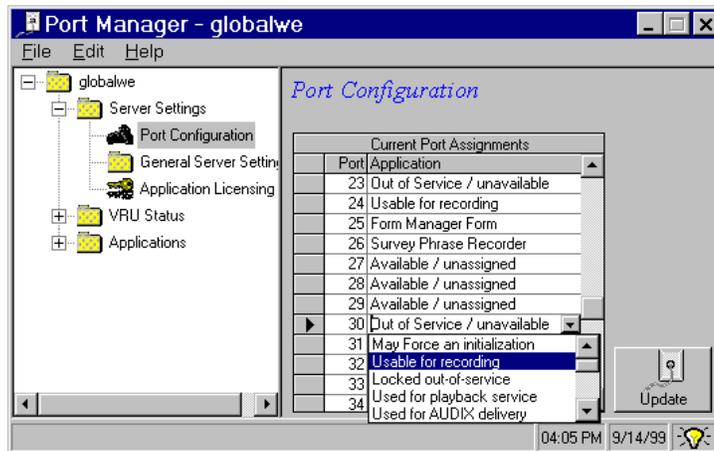
- May Force an initialization
- Used for AUDIX delivery
- Outbound CBM
- Used by Conference Bridging
- Inbound CBM
- Record CBM Custom Greetings
- Business Reach Survey
- Survey Phrase Recorder

Contact your Lucent Technologies account representative for information on obtaining additional software packages.

## Assign Ports for Recording

Use the procedure below to assign ports for recording used by the Agent Assist applications:

1. From the Port Manager window, click on a port from the list of available ports.



2. Select Usable for recording to make the port available for use by the Agent Assist applications.

You can change the port status by selecting a different status from the list provided.

## Assign Ports for Telephone Playback

To access an Agent Assist recording from a remote site by telephone, as opposed to using the PC interface, you must assign the playback service to a port on the INTUITY CONVERSANT system.

Assigning ports for telephone playback is done in the same manner as assigning ports to use for recording. Instead of selecting Usable for recording, select Used for playback service. See "Playback Recordings through the Server" on page 3-52.

### CAUTION:

*Ports caution # 1 — The playback service cannot share a port with other applications. The port is dedicated to the playback service. Make sure no other applications are assigned to the port(s).*

**⚠ CAUTION:**

*Ports caution # 2 — Prior to assigning playback service ports, make sure the port is not accessible from other DEFINITY switch routing translations. In particular, remove the associated ports from any hunt groups assigned to it in the PBX.*

See the Intuity CONVERSANT system user documentation for more information about port assignments on the Intuity CONVERSANT system.

### Save Port Assignments

Once all port assignments are complete, the information must be sent to the Intuity CONVERSANT system.



Click on the Update button to save the port assignments to the Intuity CONVERSANT system as displayed in the Current Port Assignments window.

### General Server Settings Administration

---

The General Server Settings portion of the Port Manager window is used to set the server interface parameters.

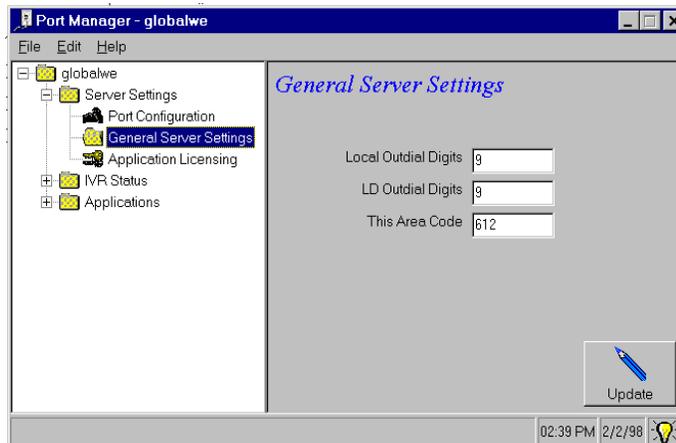
**⇒ NOTE:**

This General Server Settings window is currently used exclusively for the CallBack Manager application. Agent Assist software does not utilize this administrative parameter that defines dialing characteristics.

Use the procedure below to access the General Server Settings:

1. Start at the Port Manager window and open the server folder.
2. Open the Server Settings folder.
3. Click on the General Server Settings folder.

The system displays the General Server Settings window.



4. Type a digit in the Local Outdial Digits field.
5. Type a digit in the LD Outdial Digits field.
6. Type your three-digit area code in the This Area Code field.  
If you are in a 10-digit dialing area, use ###.
7. Click on the Update button to save the settings.



### Agent Assist Application License Administration

Agent Assist is licensed on a per application basis. To purchase additional licenses, call Lucent Technologies at **1-800-242-2121** or CenterPoint Solutions at **303-382-6300**.

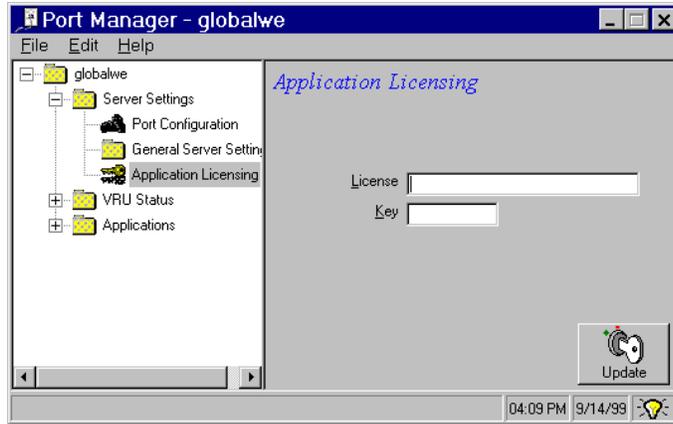
When purchasing this software, you should have received licensing information from your Lucent Technologies account representative and/or the Lucent professional services organization. If you do not have a license, contact Lucent at 1-800-242-2121. Have the following information available when you call:

- Agent Assist Order # \_\_\_\_\_
- Applications Purchased: 1) AO 2) MCR 3) CEO 4) STAR 5) AgentNow 6) Bundle
- Intuity CONVERSANT machine name: \_\_\_\_\_

Use the procedure below to add licenses to the Agent Assist System software:

1. Start at the Port Manager window.
2. Click on the INTUITY CONVERSANT system folder.
3. Expand the Server Settings folder.

4. Click on Application Licensing. The system displays the Application Licensing window.



**WARNING:**

*These fields should never be changed unless adding licenses. DO NOT DELETE any information currently contained in the fields.*

5. Click on the Update button to save the license information.



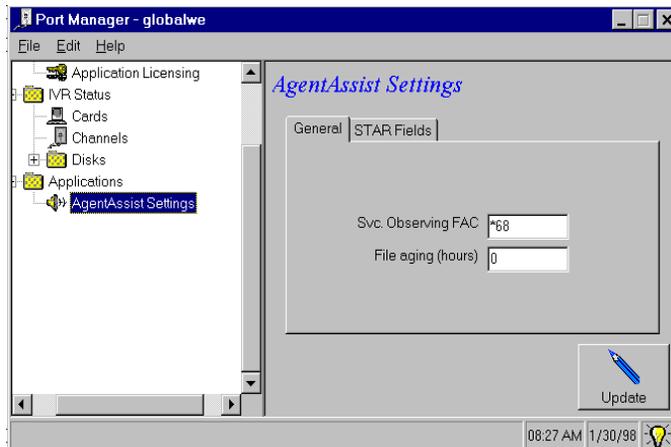
### Agent Assist Settings Administration

The Agent Assist portion of the Port Manager window is used to set up the interface between the client PC and the switch.

Use the procedure below to access the Agent Assist Settings:

1. Start at the Port Manager window and click on the Applications folder.
2. Click on the Agent Assist Settings folder.

The system displays the Agent Assist Settings window.



3. Type the Service Observing Feature Access Code (FAC) in the `Svc. Observing FAC` field to allow the CentreVu® Messenger/ Intutiy CONVERSANT system to bridge onto the appropriate agent station(s). The Remote Service Observing FAC is required for all recording applications.

The FAC assigned in the `Svc. Observing FAC` field and the FAC assigned on the DEFINITY switch must be the same. See “Assign Remote Service Observing FAC” on page 3-54 for the procedure to assign the Remote Service Observing FAC on the DEFINITY switch.

In the example above, the DEFINITY FAC for Remote Service Observing is set to \*68. (This is set on the switch)

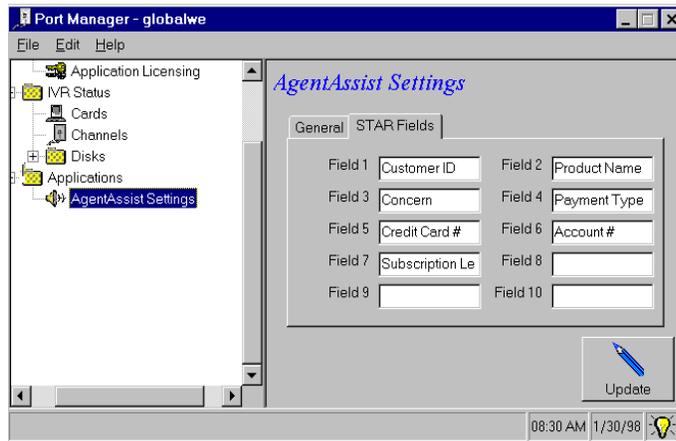
4. The File Aging represents the number of hours the server will save recordings. “1” hour to “8760” hours (one year) may be chosen. By placing a “0” (zero) in this field, the recordings will remain on the server until the administrator chooses to remove them.

**CAUTION:**

*Regular file system management is required to ensure the system does not fill with old recordings.*

5. Click on the STAR Fields tab. The STAR Fields tab contains ten fields into which customized field descriptions may be entered to provide a window for the agent to enter call notes during or after a call session. These fields must be specified in order to generate entry fields in the S.T.A.R.

application feature of Observance Notes. See “Entering Observance Notes” on page 7-125 of Chapter 7, “Spontaneous Telephony Agent Recording (S.T.A.R.)”. Type your customized description into the field(s).



6. Click on the Update button to store the settings within the Intuity CONVERSANT system.



## VRU Status

The VRU Status main folder provides an overview details screen, listing basic software release and hardware configuration information.

There are three main VRU Status sub-folders, which provide detailed information regard VRU cards, channels and disks.

### **⇒ NOTE:**

VRU Status folders are informational only. They indicate current settings, but *do not* enable you to change those settings

Use the procedure below to view VRU Status overview details:

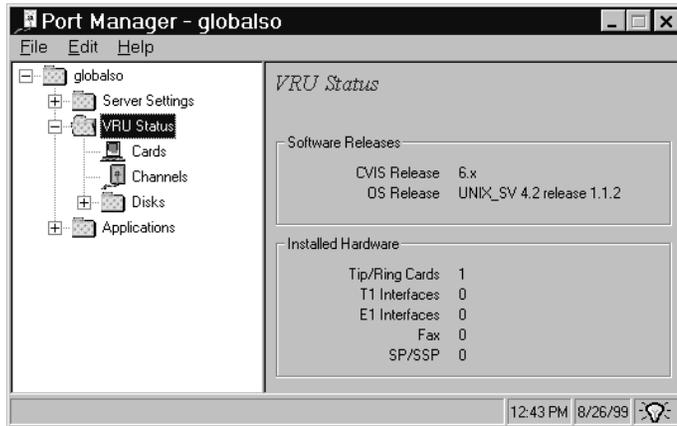
1. Click VRU Status folder icon.

The system displays the VRU Status window.



2. Expand the VRU Status folder.

The system displays the status window with the current settings:

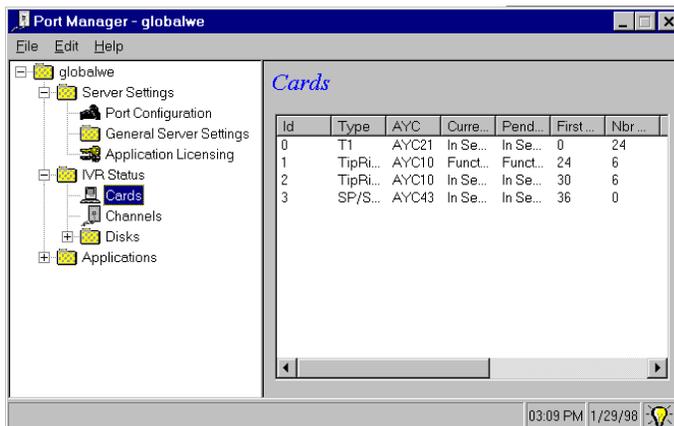


## Cards

The Cards folder provides an informational window, containing a table listing all VRU cards, with detailed information about the makeup, position and status of each.

Use the procedure below to view card information:

1. Start at the VRU Status window and click on the Cards sub-folder.  
The system displays the Cards window.



Use the scroll bars at the bottom and/or side of table to view off-screen columns or rows. To increase the width of any column, double-click on border of column heading, or drag border to desired width.

### Cards Informational Screen Contents

The Cards window consists of the following information:

- Id — identifying number corresponding to the physical position of the card
- Type — identifies the kind of card used. Current options are:
  - T1 = digital card
  - TipRing = analog card
  - SP/SSP = signal processor/super signal processor (advanced speech processing card)
- AYC — Lucent model number of this card
- Current State — Options are:
  - In service = card is functioning properly
  - Functionally OOS = functionally out of service (system does not recognize the card)
  - Manually OOS = manually out of service (card has been removed from service by an individual)
- Pending State — indicates pending card status. Options are the same as for Current State
- First Channel — number assigned to the first channel available on this card

- Nbr Channel — total number of channels available on this card. (e.g., a card with First Channel = 0 and Nbr Channel = 24 has 24 available channels, numbered 0 through 23. The first channel of the next card will be 24.)
- I Vol — input volume setting
- O Vol — output volume setting
- TTS O Vol — text to speech output volume setting
- Version — version number of the software patch downloaded to the card
- Flash Time — time required for a flash (switch hook), in milliseconds
- Wink Time — wink time, in milliseconds

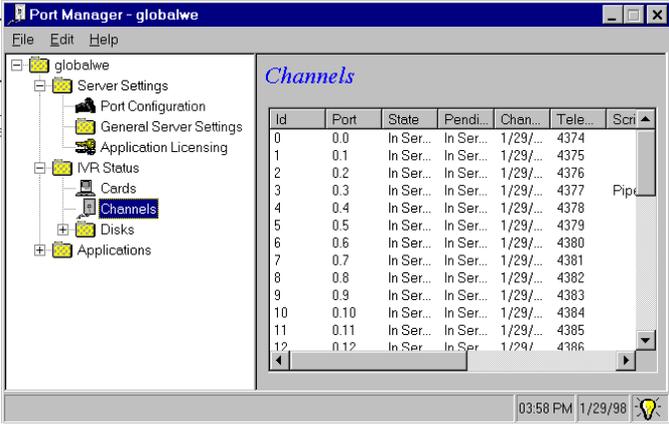
## Channels

The Channels folder provides an information screen, containing a table listing all available channels, with detailed information about the makeup, position and status of each.

Use the procedure below to view the Channel window.

1. Start at the VRU Status window and click on the Channels sub-folder.

The system displays the Channels window.



The screenshot shows a window titled "Port Manager - globalwe" with a menu bar (File, Edit, Help) and a tree view on the left. The tree view shows a hierarchy: globalwe > Server Settings > Port Configuration > General Server Settings > Application Licensing > IVR Status > Cards > Channels (selected). The main pane displays a table titled "Channels" with the following data:

Id	Port	State	Pendi...	Chan...	Tele...	Scr...
0	0.0	In Ser...	In Ser...	1/29/...	4374	
1	0.1	In Ser...	In Ser...	1/29/...	4375	
2	0.2	In Ser...	In Ser...	1/29/...	4376	
3	0.3	In Ser...	In Ser...	1/29/...	4377	Pip...
4	0.4	In Ser...	In Ser...	1/29/...	4378	
5	0.5	In Ser...	In Ser...	1/29/...	4379	
6	0.6	In Ser...	In Ser...	1/29/...	4380	
7	0.7	In Ser...	In Ser...	1/29/...	4381	
8	0.8	In Ser...	In Ser...	1/29/...	4382	
9	0.9	In Ser...	In Ser...	1/29/...	4383	
10	0.10	In Ser...	In Ser...	1/29/...	4384	
11	0.11	In Ser...	In Ser...	1/29/...	4385	
12	0.12	In Ser...	In Ser...	1/29/...	4386	

The status bar at the bottom of the window shows the time as 03:58 PM on 1/29/98.

Use the scroll bars at the bottom and/or side of the table to view off-screen columns or rows. To increase the width of any column, double-click on the border of column heading, or drag border to desired width.

## Channels Informational Screen Contents

The Channels screen consist of the following information:

- Id — identifying number
- Port — card and position of channel (e.g., 0.2 = card Id 0, channel position 2)
- Current State — Options are:
  - In service = channel is functioning properly
  - Functionally OOS = functionally out of service (system does not recognize the channel)
  - Manually OOS = manually out of service (channel has been removed from service by an individual)
- Pending State — indicates pending channel status. Options are the same as for Current State
- Changed — date and time when the state of this channel was last changed
- Telephone — administered telephone extension for this channel, assigned by you at the server



### NOTE:

Any incorrect assignments made at the server will be reflected here.

- Script — name of VRU application currently using this channel
- Called # — the number dialed to reach that application
- Calling # — the called Id# (ANI) — the number called *from* — (available only if you have caller Id service on this line)
- Caller Input — the last digits collected from the caller (as when a caller is asked to dial one or more digits to make a selection)



### NOTE:

x = masked input (e.g., caller is asked to input a security code)

- Dialed Digits — the most recent outbound digits dialed by the application
- Calls Rec'd — calls received — the number of calls received by this channel since the last time the Refresh Channels command was used.

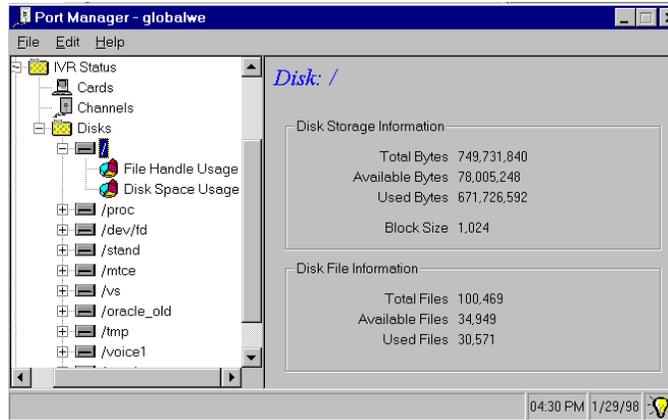
## Disks

There is a separate folder for each file system (each of which may or may not correspond to a separate physical disk). Each is identified by a disk-drive icon and a designation of the file system location.

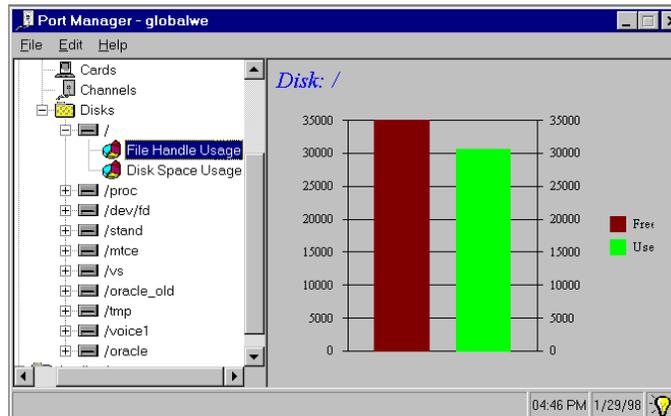
There are three windows available for each “disk” — an overview details window, and two windows showing bar charts that compare free and used portions of system disk space.

Use the procedure below to see the Disk overview information:

1. Start at the VRU Status window and click on the desired disk folder icon. The system displays the disk storage and disk file information window.

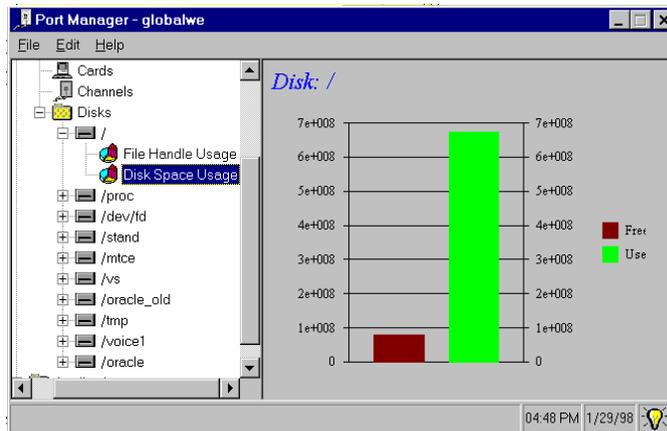


2. Click on the disk folder icon to view the bar charts.
3. Click on the icon labeled File Handling Usage. The system displays the File Handling Usage window.



4. Click on the icon labeled Disk Space Usage.

The system displays the Disk Space Usage window.



## Client PC Administration

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The client PC features are administered through the Agent Assist Administrator application.

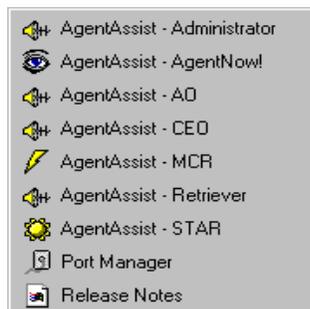
Use the procedure below to access the Agent Assist Administrator:

1. For Windows NT and Windows 95/98, select Programs from the Start: menu.

The system displays the list of Program folders.

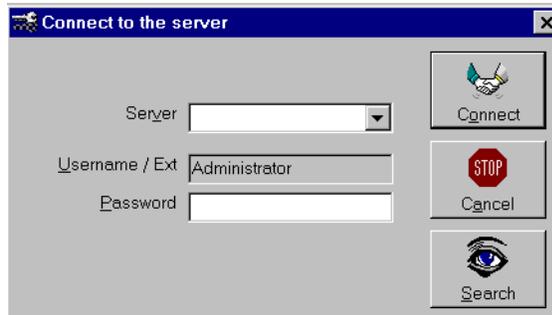
2. Select CenterPoint Solutions.
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist – Administrator.

The system displays the administration login window.



**⇒ NOTE:**

Only the Administrator is allowed access to these menus. After the initial login, the system automatically displays the Username and Password.

5. In the Server field, select or type a Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network.

Click on the Search button to search the network for valid Intuity CONVERSANT systems.

The Username/Ext field is always set to “Administrator”.

6. In the Password field, type the administrator’s password.

The default password for the administrator is “1234”.

**⇒ NOTE:**

It is recommended that you change the administrator password and store it in a secure location. See “Change Administrator Password” on page 3-52.

7. Click on the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The information from the Intuity CONVERSANT system is downloaded to the client PC for the administration session.



### Agent Assist Administrator Functions

Using the Administrator, you can administer the basic functions including:

- Add or delete agent information
- Add supervisor information
- Administer holidays

- Retrieve and listen to recordings
- Change administrator password

## Agent Administration

**⇒ NOTE:**

Only the administrator may change agent information.

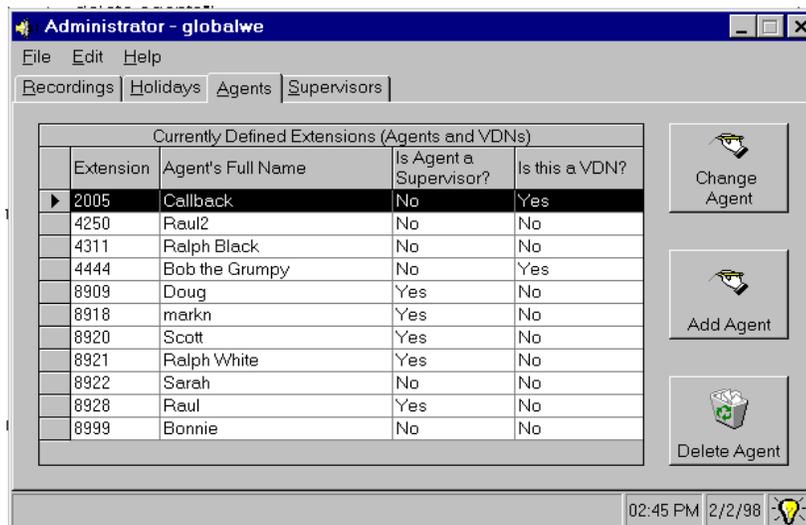
The Agents tab of the Administrator window allows the administrator to:

- Add agents
- Delete agents
- Change existing agent details

Use the procedure below to access agent information:

1. Start at the Administrator window and click on the Agents tab.

The system displays the Agents table.



## Add Agents

Use the procedure below to add agents:

1. Start at the Agents table and click on Add Agent button.

The system displays the Add Agent window.

2. In the `Extension` field, type the new agent extension number.
3. In the `Agent / VDN Name` field, type the new agent's name.
4. Select `Extension is an Agent` box.

### ⇒ NOTE:

The “Extension is a supervisor” box is the only method to add supervisors.

### ⇒ NOTE:

In order to record the agent using the Customer Experience Observing (C.E.O.) application, the box “Extension is a VDN (for CEO schedules)” must be checked.

5. In the `New Password` field, type the agent password.
6. In the `Confirm New` field, type the same password as entered in the `New Password` field.

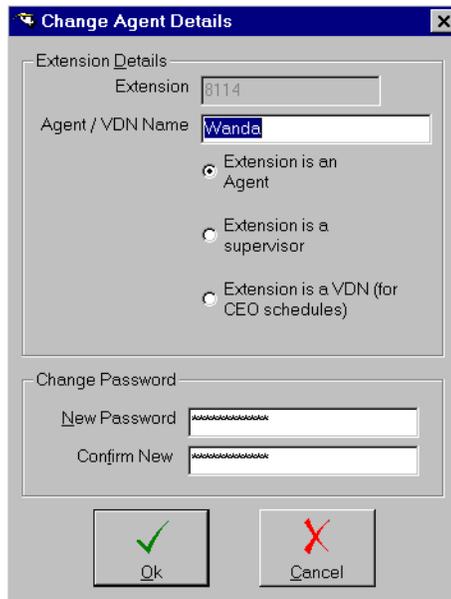
## Change Agent Details

Use the procedure below to change the agent name for an extension, indicate the agent as a supervisor, change the extension to a VDN, or change the password for an agent:

1. Start at the Agent table and highlight the agent you wish to change.
2. Click on the Change Agent button.



The system displays the Modify Extension Information window.



3. To change the agent name, type the new name in the *Agent / VDN Name* field.

The agent/VDN name is case insensitive.

4. To change the password, type the new password in the *New Password* field.

The password must be numeric to use the playback feature.

5. Type the new password again in the *Confirm New* field.

To ensure security, asterisks (\*) display in both password fields.

**⇒ NOTE:**

The password you enter in the *New Password* and the *Confirm New* fields must be identical.

6. To change an agent to a supervisor, click on the box next to *Extension is a supervisor*.
7. To indicate the agent extension is part of a VDN, click on the box next to *Extension is a VDN (for CEO schedules)*.
8. Click on the OK button to save the changes.



### Delete Agents

To delete an agent, start at the Agents table and select the applicable row and press the Delete Agent button. The Delete Agent confirmation appears.

## Supervisor Administration

The Supervisor tab of the Administrator window allows the administrator to:

- Add agents to a supervisor's monitoring pool
- Administer the supervisor-to-agent relationships in the call center

### ⇒ NOTE:

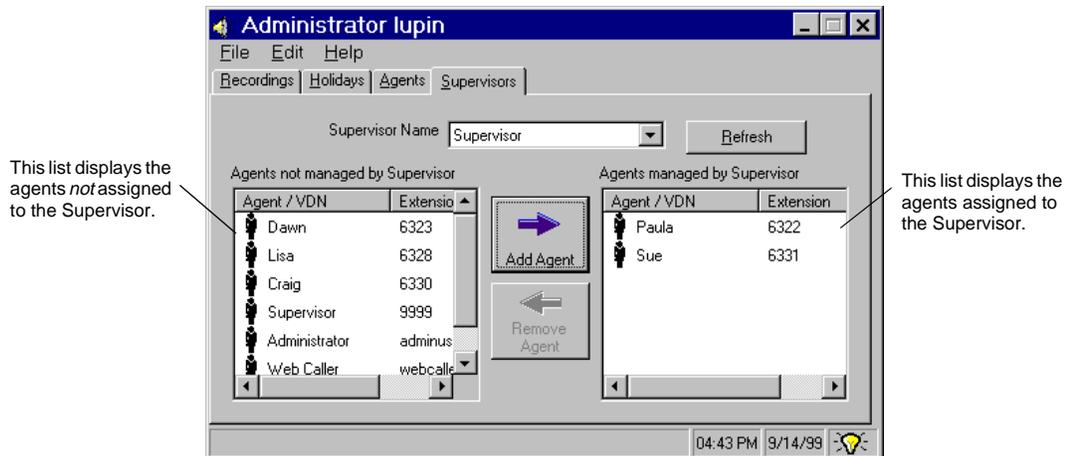
By default, everyone is initially added to the system as an "Agent". To assign an agent with supervisor status, use the "Add Agents" procedure above, and enter "Yes" in the *Is Agent a Supervisor?* field.

To *change* supervisor details, such as passwords, use the "Change Agent Details" procedure above.

Use the procedure below to access supervisor information:

1. Start at the Administrator window and click on the Supervisors tab.

The system displays the Supervisors window.



2. Click the Supervisor Name arrow to display a list of all currently assigned supervisors.

By default, the system displays the first available supervisor. The list displays only supervisor names as designated in the Agents table.

3. Select the desired supervisor from the list of names.

The two lists in the window show the names of agents both assigned and *not* assigned to the selected supervisor's pool.

### Add Agents to a Supervisor

When an agent is assigned to a supervisor's pool, the supervisor is then authorized to activate an Agent Assist recording for that agent. A single agent may be assigned to multiple supervisor pools in the system.



The Add agent button takes an agent from the unmanaged pool and assigns them to the supervisor currently selected from the list of supervisors.

### Remove Agents from a Supervisor

When an agent is removed from a supervisor's pool, the supervisor is no longer authorized to activate recordings or hear recordings for the agent.



The Remove agent button takes an agent from the supervisor's managed pool and places the agent back into the general pool.

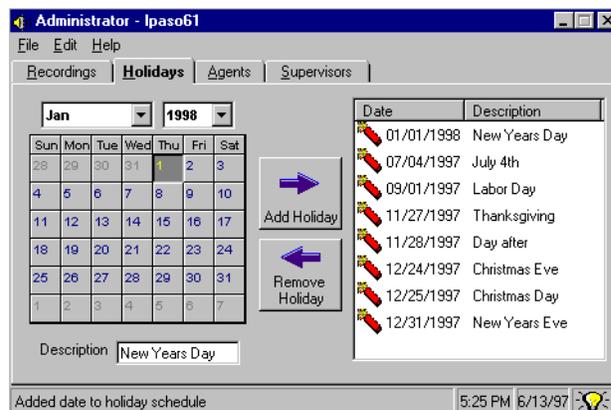
## Holidays Administration

The Holiday tab allows the administrator to assign specific days when the call center is closed for service. During these days, the scheduled Agent Assist applications do not collect any recordings.

### Add Holidays

Use the procedure below to add holidays:

1. Start at the Administrator window and click on the Holidays tab.  
The system displays the Holidays window.



2. Select the month from the pull-down menu.
3. Select the year from the pull-down menu.
4. Click on a day in the calendar to select the date.
5. Type the name of the holiday in the Description field.

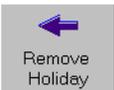


6. Click on the Add Holiday button to add the holiday to the list.
7. Repeat steps 2–6 for each holiday you wish to add.

### Delete Holidays

Use the procedure below to delete holidays:

1. Start at the Holiday window and select a holiday from the list by clicking on it.
2. Click on the Remove Holiday button.  
The holiday is deleted from the list.



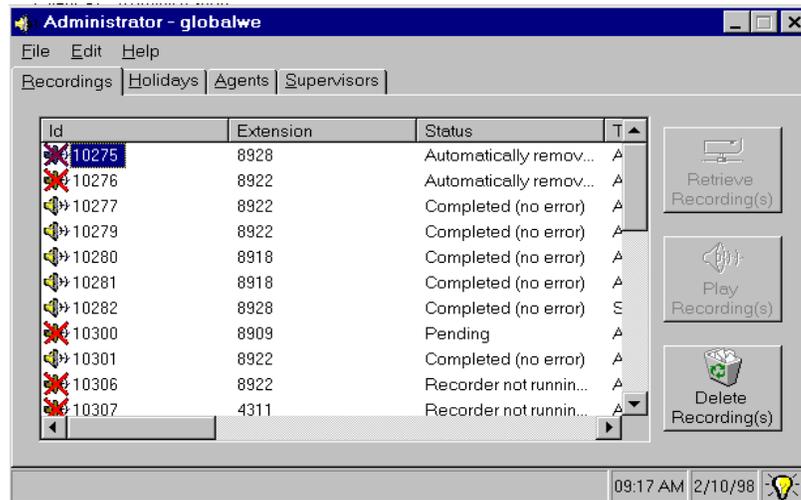
### Recordings Administration

The Recordings tab of the Administrator window lists all Agent Assist recordings. From this tab, the administrator may:

- Retrieve recordings
- Play recordings
- Delete recordings

Use the procedure below to access the Recordings tab:

1. Start at the Administrator window and click on the Recordings tab.  
The system displays the Recordings window.



**NOTE:**

If you do not see the recording you wish to play, refresh the screen. From the Edit menu, select Refresh Recordings.

## Recording Icons

The icons in the Recordings window are as follows:

- The  symbol indicates there is an associated voice file.
- The  symbol indicates there is no associated voice file.

You may only retrieve those recordings that have an associated voice file (completed without errors).

## Recordings Information

The recordings listed in this window are displayed with the following information:

- Id — indicates the unique value assigned to each recorded message and is used as a reference for recordings retrieval and management
- Extension — indicates either an agent extension, agent login ID, VDN, attendant console or any DEFINITY switch extension with the appropriate service class (that is, allows recordings)
- Status — indicates the current status of the recording process.

The following lists valid recording statuses:

- Pending — the recording is scheduled for a later time
- Error (complete) — the recording was not processed due to inability to access a Intuity CONVERSANT system port
- Actively Recording — the call is currently being recorded on a Intuity CONVERSANT system port
- Completed (no error) — the recording completed without error
- Transferring request to recorder — the Intuity CONVERSANT system is being notified to begin recording
- Cancelled by user — the scheduled recording was cancelled by the agent/supervisor/process that initiated it
- Stopping — the recording is in the process of completing
- Reorder tone (fast busy) — the channel was busy
- Channel denied (no resources) — no channels were available for this recording
- Recorder not running at time-of-request — the recorder on the Intuity CONVERSANT system was not running
- Automatically removed by server — the server removed the recording based on the File Aging parameter (see “Agent Assist Settings Administration” on page 3-32)

- Type — indicates the application name used to collect the recording (Agent Observing, C.E.O., S.T.A.R., M.C.R., or AgentNow!)
- Requesting Agent — indicates the login ID/extension of the agent that requested the recording
- Requested Start — indicates the requested date and time scheduled for the recording to begin
- Actual Start — indicates the actual date and time the recording began
- Actual Stop — indicates the actual date and time that the recording completed
- Length (seconds) — indicates the total length of the recording
- General Notes — indicates any notes the agent entered as part of the Malicious Call Recording and S.T.A.R. applications
- Stored At — indicates the final recording storage location on the Intuity CONVERSANT system; by default, the files are stored in the following directory: **/usr/add-on/centerpoint/agentassist/recordings/id#.adp**  
The directory **/usr/add-on/centerpoint/agentassist/recordings** is initially created as a link to the voice files system in version 2.7 and up.

Click on the scroll bars at the bottom and to the right of the listed recordings to view all the information.

The Recordings window elements can be shortened to view other elements instead of using the scroll bar on the bottom of the screen. When the cursor is on a field line, it changes to a bar with arrows. Drag the cursor to the left or right to adjust the fields.

## Retrieve Recordings

### Retrieve Recordings Through the Client PC

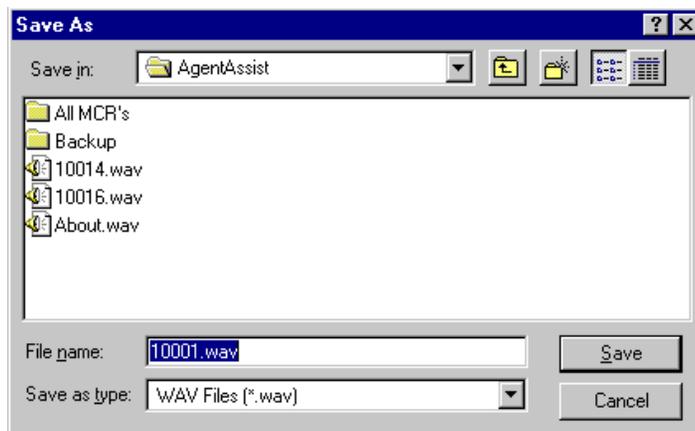
Use the procedure below to retrieve recordings through the client PC:

1. Start at the Recordings tab of the Administrator window and highlight the recording(s) you wish to retrieve. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.
2. Click on the Retrieve Recording(s) button.



The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window.



3. Select the location (folder or floppy diskette) to save the retrieved recording(s).
4. Choose from the following options:
  - If you have a CELP voice file player, select Edit|Use CELP Player to play CELP voice files to use the CELP player.
  - If you do *not* have a CELP voice file player the files automatically convert and save as a .wav file.
5. Click Save.



**NOTE:**

The Retrieve Recording(s) option is designed to retrieve only.

## **Playback Recordings**

---

There are two methods by which to playback recordings:

- Through the client PC (Multimedia player required)
- Through the INTUITY CONVERSANT server via touch-tone a telephone

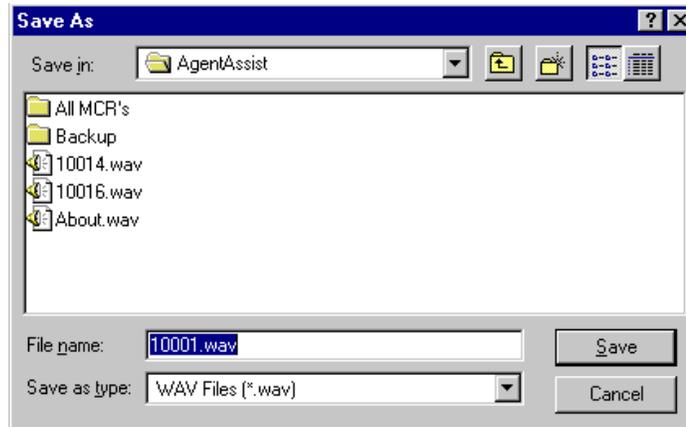
### **Playback Recordings Through the Client PC**

Use this procedure to listen to completed recordings from the client PC:

1. Start at the Recordings tab of the Administrator window and highlight the recording(s) you wish to playback. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.
2. Click on the Play Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window.



3. Select the location (folder or floppy diskette) to save the retrieved recording(s) for playback.
4. Choose from the following options:
  - If you selected Edit|Use CELP Player to play CELP voice files, the CELP voice file player opens.
  - If you saved the file as a .wav file, your default Windows voice player opens.

**⇒ NOTE:**

CELP files are stored on the Intuity CONVERSANT system with an .lvp extension and use less hard drive space than .wav files.

The default multimedia recorder window is displayed and indicates at the top of the window which .wav file is currently present for playback.



5. Click the  button to listen to the recording.
6. Close the multimedia window or click on a .wav file from the Task bar to continue with playback(s).

**⇒ NOTE:**

If multiple recordings are retrieved for playback and you wish to listen to a specific .wav file, you may click on the specific .wav file from the Task Bar for playback.

## Playback Recordings through the Server

Recorded messages can also be played using the telephone to access the server directly by entering the recording ID number or the extension on which the recording was made.

Use the procedure below to listen to completed recordings from a telephone:

1. Dial the telephone number corresponding to the channel assigned to Used for Playback on the Intuity CONVERSANT system. The Used for Playback Service must be assigned to the selected channel using the Port Manager. See "Assign Ports for Telephone Playback" on page 3-29 for more information.
2. The supervisor will be prompted for their extension followed by the # key and password followed by the # key. Once connected to the Agent Assist Recording Player, the supervisor has the option to hear a specific recording or listen to a list of recording IDs for a given extension.

To listen to a specific recording:

- Enter the recording ID followed by the # key.  
You hear the ID number, extension, date, and length of the recording and the actual recording.

To listen to a list of recordings for a given extension:

- Enter an agent extension number followed by the \* key.  
You hear the ID number, extension, date, and length of the recording.

## Delete Recordings

Use the procedure below to delete recordings:

1. Start at the Recordings tab of the Administrator window and select recording(s) from the list. To select multiple recordings, hold down the Control key while selecting recordings.
2. Click on the Delete Recording button.



### ⇒ NOTE:

It is recommended that recordings saved on the Client PC hard drive are deleted periodically to save space

## Change Administrator Password

---

Use the procedure below to change the administrator password:

1. Start at the Administrator window. From the File menu, select Change Password.
2. Type the old administrator password in the Old Password field.

3. Type the new administrator password in the `New Password` field.
4. Type the new administrator password again in the `Confirm New` field.



**NOTE:**

Both entries in the password fields must be identical for the new password to be accepted.

5. Click on the OK button to save the changes.



## **DEFINITY Switch Administration**

---

To successfully run an Intuity CONVERSANT Agent Assist application, several items on the DEFINITY switch must be configured properly. These deal primarily with the assignment of the Remote Service Observing Feature Access Code (FAC). To administer the Remote Service Observing FAC, the following items must be assigned on the switch:

- Remote Service Observing Feature Access Code (FAC)
- Class of Restriction permitting Service Observing capability to the Intuity CONVERSANT Ports
- Remote Service Observing system parameter
- PBX warning tones (optional)



**CAUTION:**

*The use of the warning tone feature may be subject to federal, state, or local laws, rules or regulations and may be prohibited pursuant to the laws, rules, or regulations or require the consent of one or both of the parties to the conversation. Customers should familiarize themselves with and comply with all applicable law, rules and regulations before using these features.*

### **Assign Remote Service Observing System Parameter**

---

For Agent Assist applications to bridge onto DEFINITY switch conversations, the Remote Service Observing system parameter must be set in the customer options section of the DEFINITY switch. To review these settings:

1. From the DEFINITY switch console, type **display system-parameters customer-options**

After you receive the first screen of the Optional Features, go to page 2 of the screen. You will see at the bottom left column the Service Observing (Basic) option and Service Observing (Remote/By FAC) and at the top of the next column Service Observing (VDNs). All three of these options must be set to **Y**. If they are not:

- a. Press the Cancel key and at the command line enter **change system-parameters customer-options**
- b. Go to page 2 again and change the options to **Y**.

### Assign Remote Service Observing FAC

To add or change the Remote Service Observing Feature Access Code, perform the following from the DEFINITY switch administration console:

1. Enter **display feature-access-codes**
2. Page down to Service Observing Listen Only Access Code.

**⇒ NOTE:**

If there is an access code associated with this feature, use Table 3-1 below to make a note of this number. This is the code that must be entered into Agent Assist CVIS Administration.

**Table 3-1. DEFINITY Switch Administration Parameters**

Parameter	Value
Remote Service Observing FAC	
Agent Class of Restriction(s) (Agent)	
Agent Class of Restriction(s) (Intuity CONVERSANT)	
Intuity CONVERSANT IP Address	
VDNs	
VDNs	
Remote Message Archival Directory	

3. To assign a new code, from the DEFINITY switch console, press Cancel and enter **change feature-access-code**
4. Page down to Service Observing Listen Only Access Code.
5. Enter the new feature access code and press the Enter key on the numeric key pad.



**CAUTION:**

*Make sure this feature access code is not being used by any other DEFINITY switch feature.*

See the DEFINITY switch documentation for further details on assigning a new Service Observing Listen Only Access Code.

### **Assign Class of Restriction for Recording on Two Server Ports**

---

After you verified the Feature Access Code, administer the server ports for the Class of Restriction (COR). The COR allows the recording of Agents and VDNs by the server. The following options must be set to **Y** for the appropriate CORs to allow the agents/VDNs to be observed by the system:

- **Can Be Service Observed** – This option must be set to **Y** for all CORs associated to the agents and/or VDNs that you would like to record.
- **Can Be A Service Observer** – This option is dedicated to the Intuity CONVERSANT Ports. This option must be set to **Y** for the CORs to be associated to the Intuity CONVERSANT ports that will be used for recording events.

### **General Tips for Changing Class of Restrictions**

#### **Find Station COR**

To view agents and the Intuity CONVERSANT system's COR, on the DEFINITY switch administration console

1. Enter **list station**

All agents and Intuity CONVERSANT system phone numbers will be listed. Also, there is a column labeled COR/COS. The first number in this column is your COR number associated with your agents and Intuity CONVERSANT ports.

#### **Display COR Attributes**

1. Once you have the COR number, enter **display COR** (COR number associated to the agents or Intuity CONVERSANT ports) Example: **display COR 1**
2. In the COR screen, there are two fields: **Can Be Service Observed** and **Can Be A Service Observer**.

## Change COR Attributes

1. Enter **change COR**
2. Tab down to the fields and type **Y** for both options.
3. Press the Enter key on the numeric pad.

Each different COR associated with agents available for recording must have this COR number assigned. Review the examples below for the appropriate configuration.

The following are some examples of how the CORs should be assigned.

- Intuity CONVERSANT, agent, and VDN CORs are the same:
  - Can Be Service Observed Y
  - Can Be A Service Observer Y
- Agent/VDN COR settings:
  - Can Be Service Observed Y
  - Can Be A Service Observer N
- INTUITY CONVERSANT COR settings:
  - Can Be Service Observed N
  - Can Be A Service Observer Y

## PBX Warning Tones

---

A warning tone may be administered on the DEFINITY switch to “warn” the caller that this conversation is being recorded. If assigned, when Agent Assist bridges onto a call, a periodic tone is played to the agent and caller throughout the entire conversation. This tone is generated by the DEFINITY switch.

### CAUTION:

*The use of these features may be subject to federal, state, or local laws, rules or regulations and may be prohibited pursuant to the laws, rules, or regulations or require the consent of one or both of the parties to the conversation. Customers should familiarize themselves with and comply with all applicable law, rules and regulations before using these features.*

Use the following procedure to add or remove Service Observing Warning Tones in the switch to inform the caller that they are being recorded:

1. From the DEFINITY switch console, enter **change system-parameters features**

2. After you entered the command, go to page 3 on the switch screen. Under this title there is a field labeled *Service Observing Warning Tone*.
3. To activate the tone, enter **Y**  
To deactivate the tone, enter **N**



---

**Overview**

---

This chapter describes the Agent Observing application. Agent Observing is one of two applications that initiate recording sessions on a scheduled basis. The intent is that this application is administered by Call Center Supervisors to schedule recordings for Agents assigned to their supervision.

**Purpose**

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The purpose of this chapter is to describe the Agent Observing application, including an explanation of its use, the procedures to access and administer the application, and how to work with the resulting recordings.

## **Agent Observing Application**

---

The Agent Observing application allows a specific user, such as a supervisor, to schedule recordings of agent audio conversations or a series of conversations. Recording begins at the specified time and continues until the scheduled time expires.

Recording is not related to agent disposition. Recording begins whether or not the agent is logged in or taking calls at that moment, and continues until the scheduled time expires.

**⇒ NOTE:**

Recording does not stop if there is continuous silence between agent conversations. Recording continues for the entire interval administered when the event was scheduled.

Any terminal accessed through the DEFINITY switch Remote Agent Observing FAC can be recorded using the Agent Observing application. A supervisor may use Agent Observing to schedule recordings for a station (extension), attendant or logical agent ID. The term “agent” refers to the station, attendant or logical agent ID being observed.

The Intuity CONVERSANT observes consecutive agent calls during the specified time interval. As long as the supervisor has scheduled Agent Observing for a particular agent, the Intuity CONVERSANT system records that agent until the scheduled time expires.

The basic use of the Agent Observing application is represented by the following scenario:

1. A Supervisor schedules recording times on a per agent basis using the Agent Observing software installed on the client PC.
2. The schedules are “uploaded” into the Intuity CONVERSANT system.
3. The time to begin recording is reached and the Intuity CONVERSANT system:
  - a. Connects to the DEFINITY switch using an available, assigned port.
  - b. Output pulses the feature access code and the agent extension.
  - c. Bridges onto the call and begins the recording for the specified time.
4. The recording stops and is stored on the Intuity CONVERSANT system in the Agent Assist recording files.
5. A supervisor retrieves and listens to recordings specific to agents within their assignment.

## Agent Observing Port Contention

Agent Observing is one of the applications with a low priority to obtain a port on the Intuity CONVERSANT system.

### **CAUTION:**

*Any application with a higher port contention priority (Malicious Call Recording, AgentNow!, and S.T.A.R.) “bump” Agent Observing off ports if no other facilities are available for use.*

See “Ports Usage” in Chapter 3, “Agent Assist Administration”, for more information about port assignments.

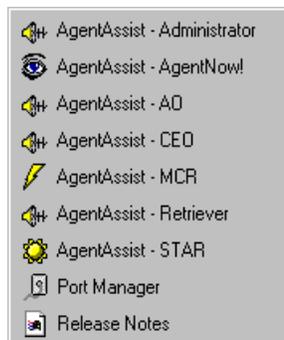
## Using Agent Observing

Agent Observing recordings are administered by scheduling recordings using the client PC interface. The schedules are then “uploaded” into the Intuity CONVERSANT system where a background process handles the triggering of recordings.

Use the procedure below to administer the Agent Observing application:

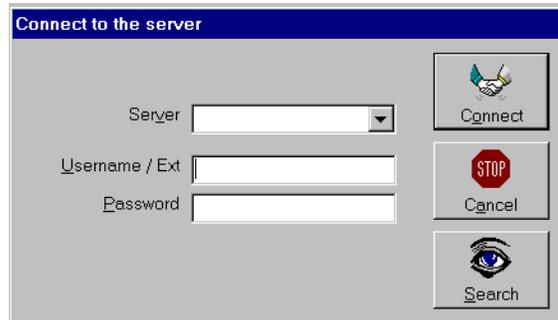
1. For Windows 95/98 or Windows NT, select Programs from the Start menu.  
The system displays the list of Program folders.
2. Select CenterPoint Solutions.
3. Select AgentAssist.

The system displays a list of applications.



4. Select AgentAssist-AO.

The system displays the initial supervisor login window.

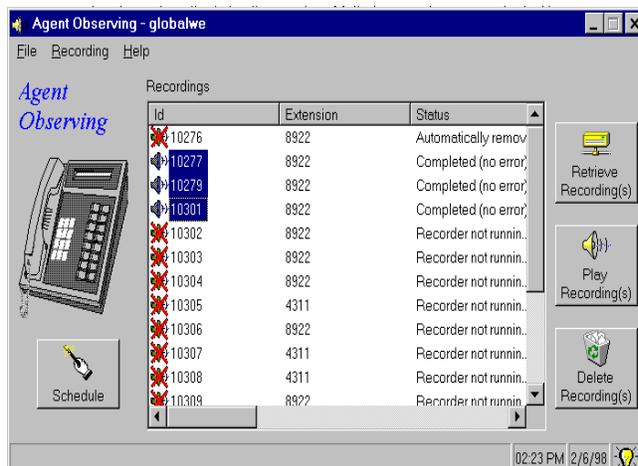


This window is similar to the login window described in “Client PC Administration” in Chapter 3, “Agent Assist Administration”. Passwords are all assigned in the Administration menu.

5. In the server field, select from the drop-down menu or type a Intuity CONVERSANT system.
6. Click the Search button to search the network for valid Intuity CONVERSANT systems. The systems listed are those connected through the local area network and have Agent Assist Server software installed and running.
7. In the Username/Ext field, type your login name or extension identifier.
8. In the Password field, type your password.
9. Click the Connect button to connect the client PC to the selected Intuity CONVERSANT system.



The system displays the Agent Observing window.



## Agent Observing Scheduling Wizard

---

Agent Observing recordings are scheduled via the scheduling “wizard”. The wizard is used to schedule either a single event, at a specific time, or multiple events. The wizard provides an easy to use step-by-step method for creating recording requests.

### Scheduling One Agent/One Recording

The Scheduling Wizard allows the supervisor to schedule a single recording for a specific agent at a designated time.

Use the procedure below to schedule using the Schedule Wizard:

1. Select the Schedule Wizard from the Recording menu or click the Schedule icon on the Agent Observing window.



#### NOTE:

Supervisors may only schedule and retrieve recordings for agents assigned to them in the administration section of the Agent Assist features. See “Agent Administration” and “Supervisor Administration” in Chapter 3, “Agent Assist Administration” for more information about administering agents and supervisors.

The system displays the initial Wizard window.



2. Click Begin to start.

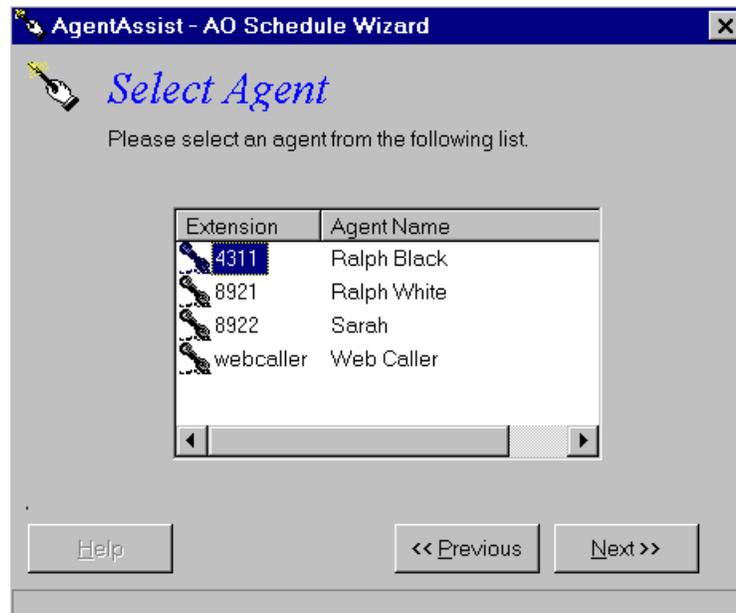


**⇒ NOTE:**

Multiple Agents/Multiple Recordings allows the supervisor to set schedule parameters and build random schedules of recordings for agents based on recording hours.

3. Select One Agent/One Recording. This allows the supervisor to schedule a single recording at a specified time.

The system lists the Available Extension/Agent Name.



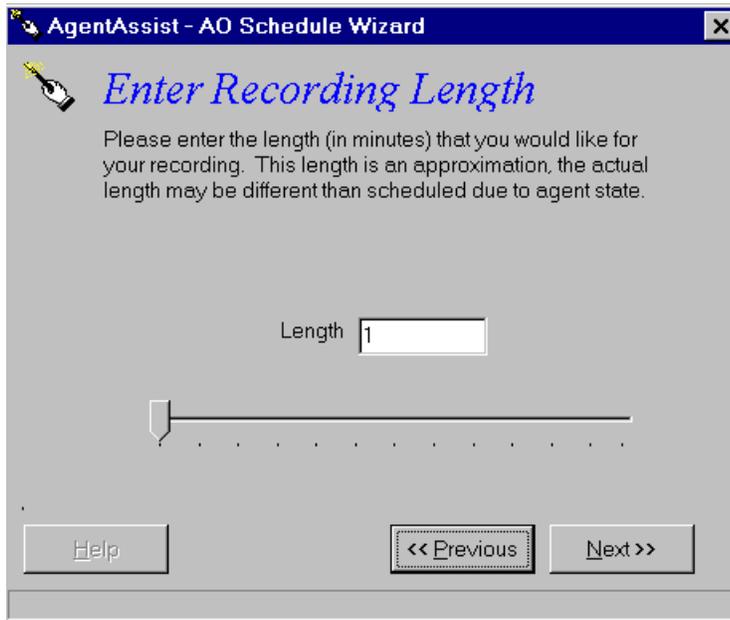
4. Select the Extension/Agent Name to schedule a single recording session. Click Next to continue.



5. Select the recording start date from the calendar. Click Next to continue.



6. Enter the start time for the recording to begin. Click Next to continue.



7. Use the slide bar or type the recording length. You can record a minimum of one minute and up to an hour. Click Next to continue.

**CAUTION:**

*The recording length will impact the amount of hard disk space needed on the Intuity CONVERSANT system to store the recordings. If you choose to create long recordings, and proper fill management is not performed, you run the risk of filling the hard disk. See the documentation provided with your Intuity CONVERSANT system for specific information about hard disk storage space.*

The system displays a tentative recording schedule of agents and the time scheduled for the recording of each agent.

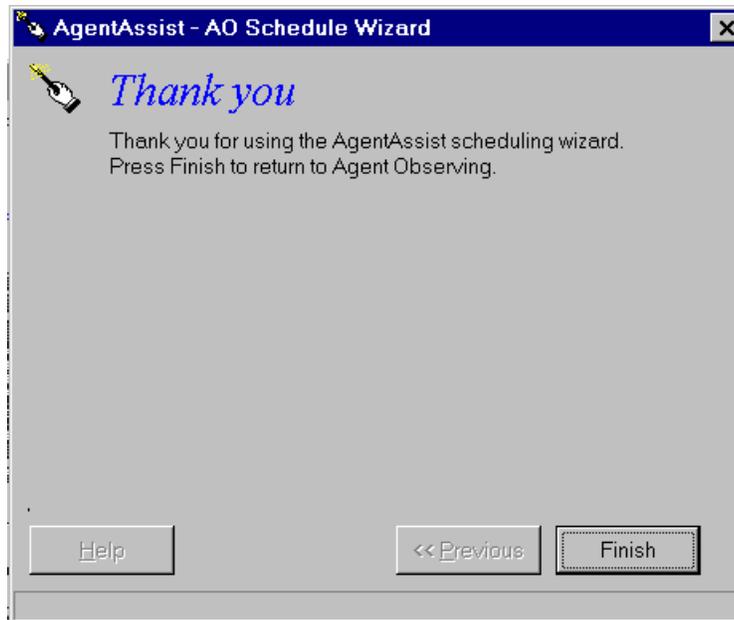


8. Click Schedule to confirm and complete the schedule.

**NOTE:**

If you are not satisfied with the schedule assigned by the system, you may back up to the previous steps to create a new schedule.

Once the schedule has been completed, the scheduling confirmation screen is presented.



9. Click Finish to complete the Schedule Wizard session.

### Multiple Agents/Multiple Recordings

The Scheduling Wizard allows you to schedule multiple recordings for multiple agents. You may also set the scheduling parameters to build a randomized schedule for groups of agents associated with a specific supervisor.

1. Select the Schedule Wizard from the Recording menu or Click the Schedule icon on the Agent Observing window.



**NOTE:**

Supervisors may only schedule and retrieve recordings for agents assigned to them in the administration section of the Agent Assist features. See "Agent Administration" and "Supervisor Administration" in Chapter 3, "Agent Assist Administration" for more information about administering agents and supervisors.

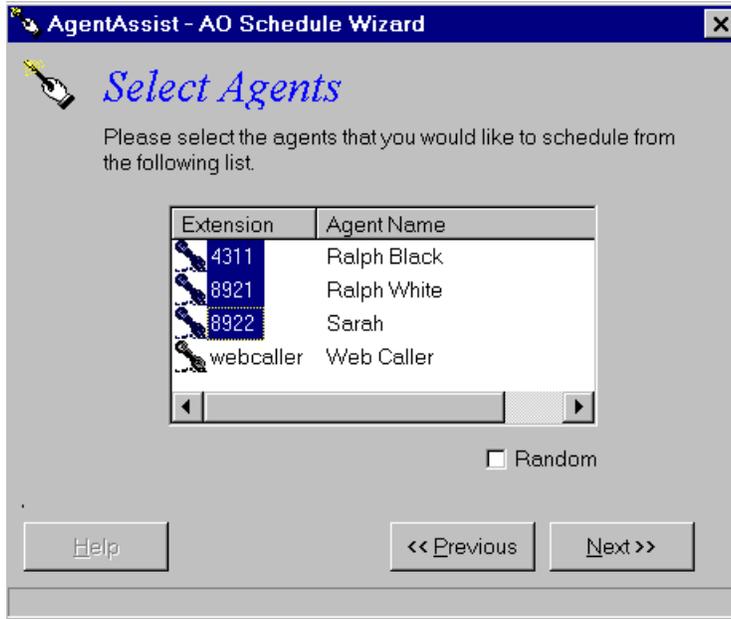
The system displays the initial Wizard window.



2. Click Begin to start.



3. Select Multiple Agents/Multiple Recordings. Click Next to continue.



4. Select multiple agents by pressing and holding down **CONTROL** while selecting the agents to be scheduled. Check the Random box to include all displayed agents in the scheduling. When you select Random, all displayed agents may be sampled during the period assigned in the Scheduling tab of this window. The number of samples assigned in the # Recordings field is performed until the session is complete.

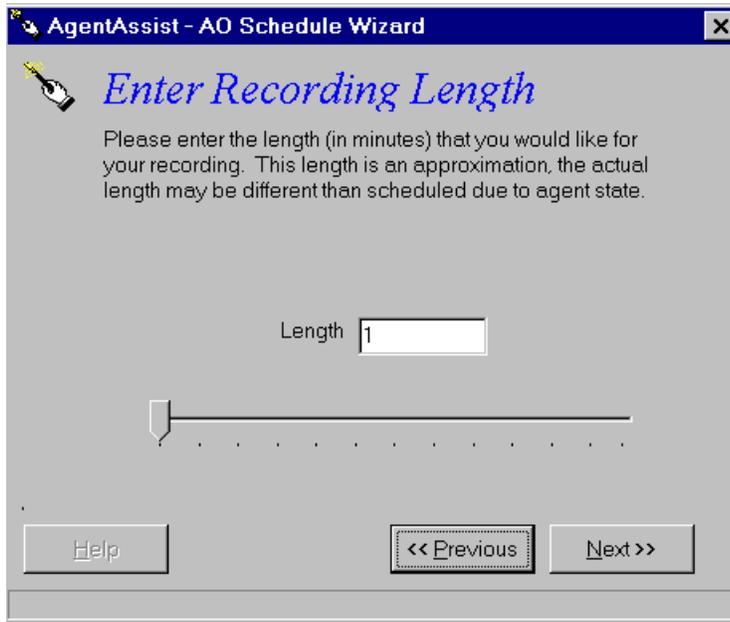
After selecting the appropriate agents, Click Next to continue.



5. Select the recording start date from the calendar. Click Next to continue.



6. Select the recording ending date from the calendar. Click Next to continue.

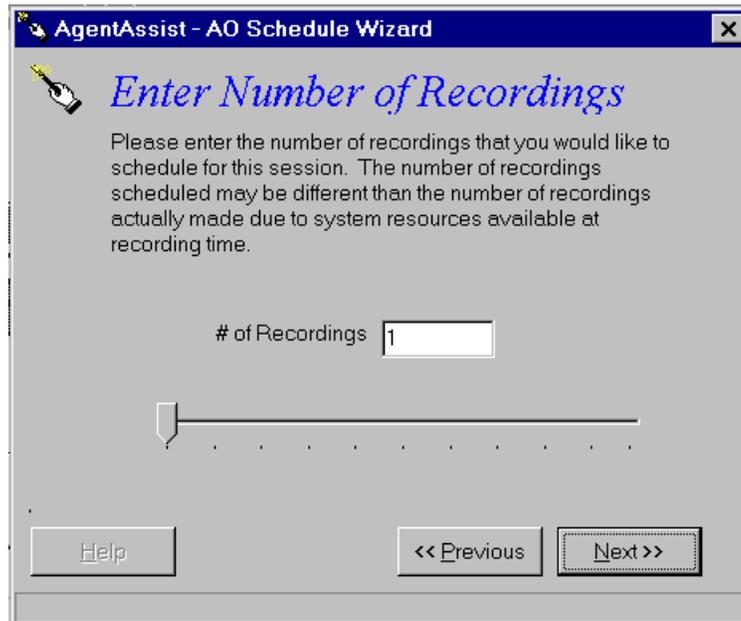


7. Use the slide bar or type in the recording length in minutes (maximum of 60 minutes). Click Next to continue.

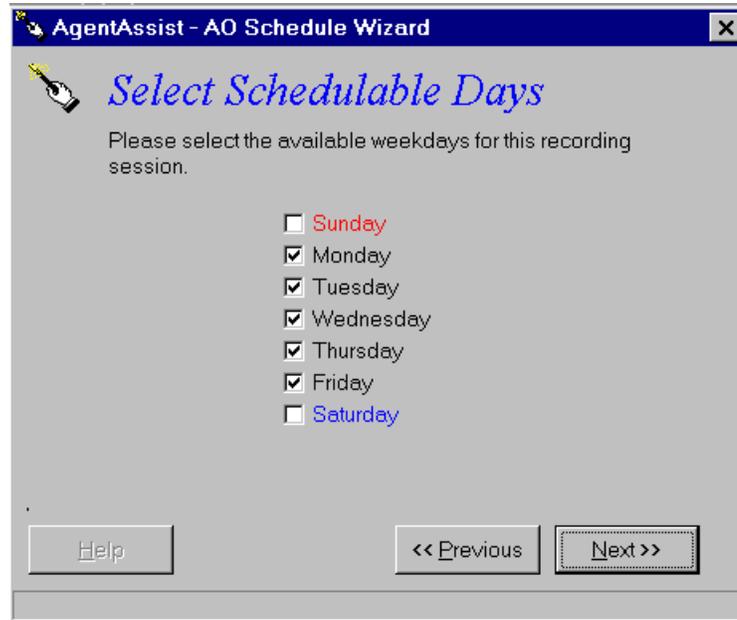


**NOTE:**

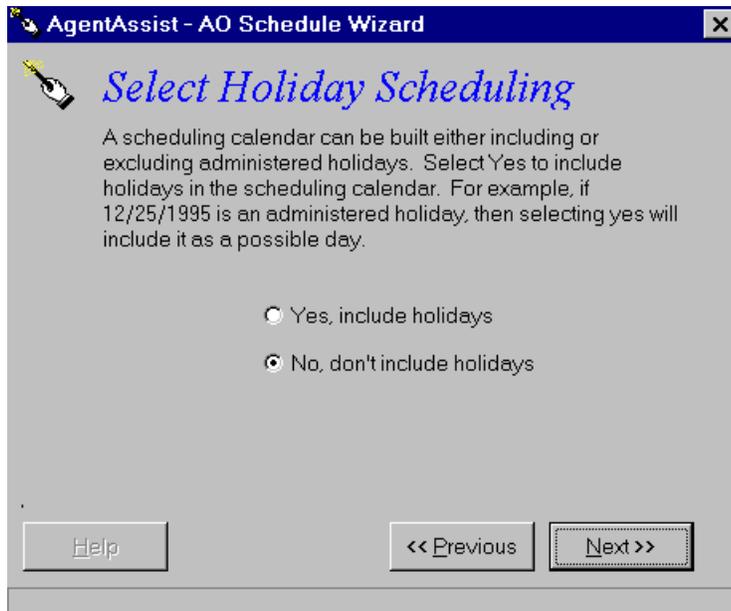
The recording length will impact the amount of hard disk space needed on the Intuity CONVERSANT system to store the recordings. If you choose to create long recordings, and proper file management is not performed, you run the risk of filling the hard disk. See the documentation provided with your Intuity CONVERSANT system for specific information about hard disk storage space.



8. Use the slide bar or type in the number of recordings you would like to schedule. Click Next to continue.



9. Select the day(s) of the week for the recordings. Click Next to continue.

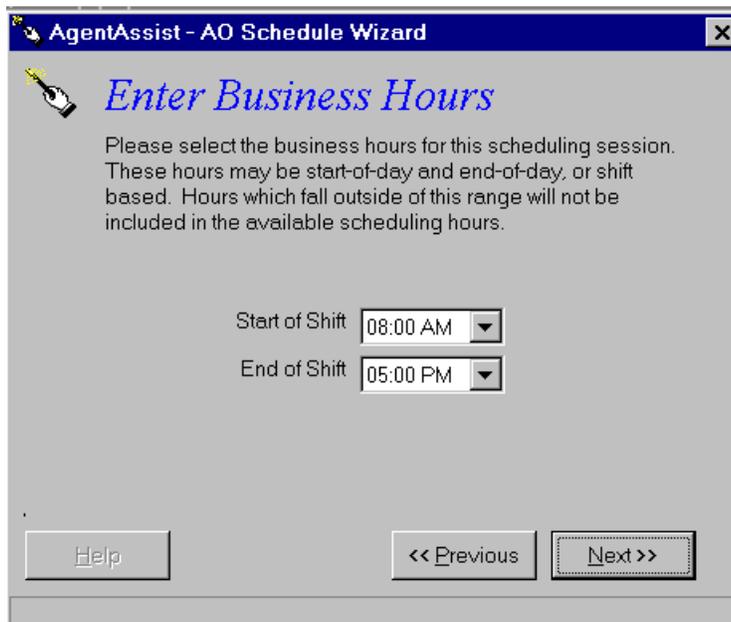


10. Select Yes to include holidays or No to exclude holidays. Click Next to continue.



**NOTE:**

Holidays are set in the Agent Assist Administrator.



11. Select the business hours for this scheduling session from the following screen. Click Next to continue.



**NOTE:**

Agent Assist Agent Observing uses the CONVERSANT to determine recording start and stop times. Synchronize the time between the CONVERSANT and the client to be sure your recordings occur as expected.



12. Select the start times for the scheduled recordings. This time defines the interval for recording, from 1 minute up to on the hour. Recording will begin at the closest interval selected. Click Next to continue.

The system displays a tentative recording schedule of agents and the time scheduled for the recording of each agent. For example, if you select one hour, the recordings begin on the hour.



13. Click Schedule to confirm and complete the schedule.



**NOTE:**

If you are not satisfied with the schedule assigned by the system, you may back up to the previous steps to create a new schedule.

Once the schedule has been completed, the scheduling confirmation screen is presented.

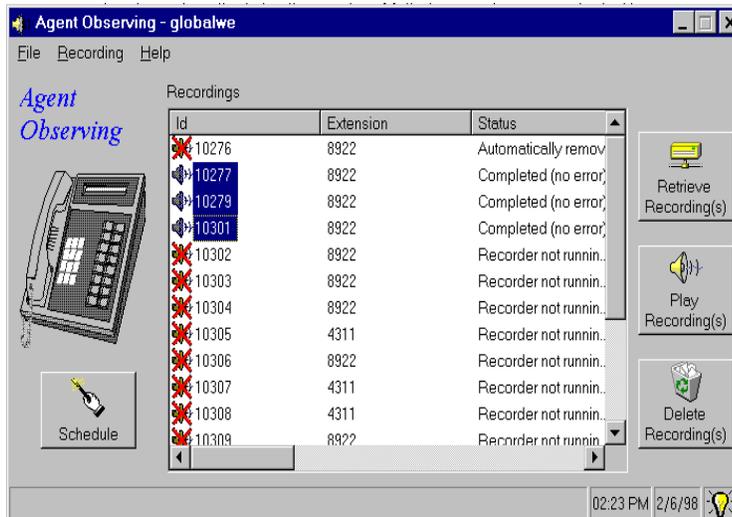


14. Click Finish to complete the Schedule Wizard session.

## Recordings Retrieval

Use the procedure below to retrieve Agent Observing recordings:

1. Start at the Agent Observing window. Highlight the recording(s) you wish to retrieve from the list in the window. Multiple recordings are selected by pressing and holding down the "Control" key while clicking on the desired recordings.



### NOTE:

You can also use the Recordings tab of the Agent Assist Administrator as described in "Retrieve Recordings" on page 3-49 in Chapter 3, "Agent Assist Administration".

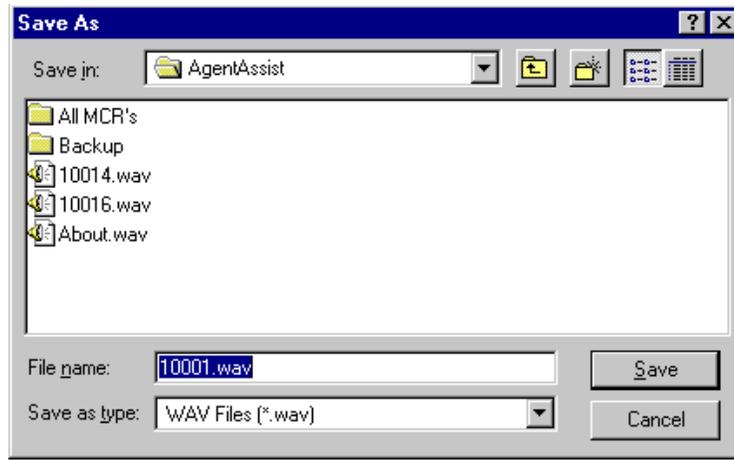


You may only retrieve those recordings that have an associated voice file (completed without errors).

2. Click the Retrieve Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window.



3. Select the location (folder or floppy diskette) to save the retrieved recording(s).
4. Choose from the following options:
  - If you have a CELP voice file player, select Recordings|Use CELP Player to play CELP voice files to use the CELP player.
  - If you do *not* have a CELP voice file player the files automatically convert and save as a .wav file.
5. Click Save.

## Playback Recordings

There are two methods by which to playback recordings:

- Through the client PC (Multimedia player required)
- Through the Intuity CONVERSANT server via a touch-tone telephone

### **Playback Recordings through the Client PC**

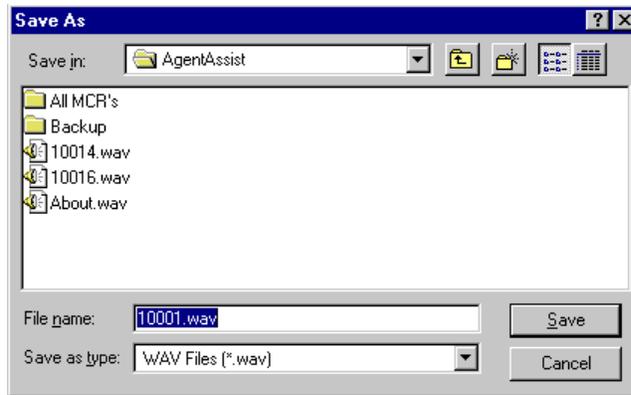
Use this procedure to listen to completed recordings from the client PC:

1. Start at the Agent Observing window. Highlight the recording(s) you wish to playback. Multiple recordings are selected by pressing and holding down the "Control" key while clicking on the desired recordings.
2. Click the Play Recording(s) button.



The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window.



3. Choose from the following options:

- If you selected Recordings|Use CELP Player to play CELP voice files, the CELP voice file player opens.
- If you saved the file as a .wav file, your default Windows voice player opens.



**NOTE:**

CELP files are stored on the CONVERSANT system with an .lvp extension and use less hard drive space than .wav files.

The default multimedia recorder window is displayed and indicates at the top of the window which .wav file is currently present for playback.



4. Click the  button to listen to the recording.
5. Close the multimedia window or click a .wav file from the Task bar to continue with playback(s).



**NOTE:**

If multiple recordings are retrieved for playback and you wish to listen to a specific .wav file, you may click the specific .wav file from the Task Bar for playback.

### Playback Recordings through the Server

Recorded messages can also be played using the telephone to access the server directly by entering the recording ID number or the extension on which the recording was made.

Use the procedure below to listen to completed recordings from a telephone:

1. Dial the telephone number corresponding to the channel assigned to Used for Playback on the Intuity CONVERSANT system. The Used for Playback Service must be assigned to the selected channel using the Port Manager. See “Assign Ports for Telephone Playback” on page 3-29 in Chapter 3, “Agent Assist Administration”, for more information.
2. The supervisor will be prompted for their extension followed by the # key and password followed by the # key. Once connected to the Agent Assist Recording Player, the supervisor has the option to hear a specific recording or to a list of recordings for a given extension.

To listen to a specific recording:

- Enter the recording ID followed by the # key.

You hear the ID number, extension, date, and length of the recording and the actual recording.

To listen to a list of recordings for a given extension:

- Enter an agent extension number followed by the \* key.

You hear the ID number, extension, date, and length of the recording.

**⇒ NOTE:**

The supervisor password is identical to that assigned in the client application. As a result of the capability of accessing via a touch-tone phone, this password must be numeric.

## **Refresh Recordings**

---

To refresh recordings, from Recording menu, select Refresh. You may also press **(F5)** to refresh recordings. If any additional recordings have been scheduled or added, they now appear in the window.

## **Delete Recordings**

Start at the Agent Observing window. Select the session(s) from the scheduled recording list. Multiple sessions are selected by holding down the “Control” key and clicking on the session(s) from the recording list. Click the Delete Recording(s) button. The system sends a message to the Intuity CONVERSANT system to remove the session(s) from the scheduled list.

**⇒ NOTE:**

You can also use the Delete button on the Recordings window of the Agent Assist Administrator, as described in “Delete Recordings”, in Chapter 3, “Agent Assist Administration”

## Unschedule Future Events

To “Unschedule” a recording(s), select the session(s) from the scheduled recording list and select Recording|Unschedule. Multiple sessions are selected by holding down the “Control” key and clicking on the session(s) from the recording list. The system sends a message to the Intuity CONVERSANT system to remove the session(s) from the scheduled list. A confirmation screen appears for the unschedule procedure.

 **NOTE:**

Only pending recordings scheduled for a future time may be unscheduled.

 **WARNING:**

*Once removed from the Intuity CONVERSANT system, the record cannot be retrieved unless previously stored on a floppy diskette or converted to a .wav file.*

## Archive Recordings

Files may be saved for later usage or editing. This is accomplished by storing them as a standard .wav file in a directory (or floppy diskette) located somewhere other than on the Intuity CONVERSANT system.

 **CAUTION:**

*It is highly recommended that recordings are periodically removed from the Intuity CONVERSANT system to save space on the system disk.*

## Overview

---

This chapter describes the Malicious Call Recording (M.C.R.) application. M.C.R. is one of three “on-demand” applications used by an agent to create recordings. “On-demand” refers to the ability to begin recording immediately from an Agent Assist client PC by clicking the appropriate application icons. The other On-demand applications are S.T.A.R. and AgentNow!.

## Purpose

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The purpose of this chapter is to describe the Malicious Call Recording application, including an explanation of its use, the procedures to access and administer the application, and how to work with the resulting recordings.

## **Malicious Call Recording Application**

The Malicious Call Recording (M.C.R.) application allows an agent to record an undesirable conversation on-demand.

The basic use of the Malicious Call Recording application is represented by the following scenario:

1. A malicious call is received by an agent.
2. The agent selects Malicious Call Recording and after logging in, clicks on the Start Recording button.
3. A message is sent to the Intuity CONVERSANT system and bridges on to the call and records the conversation.
4. Recording continues until the agent clicks the Stop Recording button.
5. The agent can click the Observance Notes tab and enter text information about the call.
6. The recording is stored for later retrieval.

 **NOTE:**

If Malicious Call Recording is the only Agent Assist application installed on a PC, the Recording Retriever must also be installed to manage recordings.

## **Malicious Call Recording Port Contention**

Malicious Call Recording has the highest priority in obtaining a port on the Intuity CONVERSANT system and takes precedence over port usage when simultaneous requests are made for Agent Observing, AgentNow!, C.E.O. or S.T.A.R. sessions. Malicious Call Recording “bumps” any other Agent Assist application off ports if no other facilities are available for use. However, Malicious Call Recording *does not* interrupt a Intuity CONVERSANT system application that is physically assigned to a system port.

See “Ports Usage” in Chapter 3, “Agent Assist Administration”, for more information about port assignments.

## Accessing Malicious Call Recording

Typically, when using M.C.R., you wish to access the application as quickly as possible to begin call recording. Thus, it is suggested that agents log in to M.C.R. before they begin to take calls. Use the procedures below to log in and create an instant access icon to the M.C.R. application.

### Log in to Malicious Call Recording

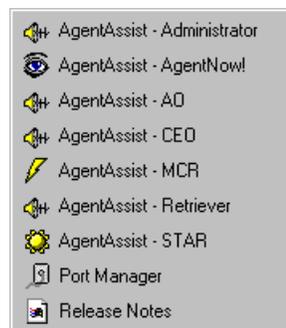
Use the procedure below to log in to the Malicious Call Recording application:

1. Windows 95/98 or Windows NT: From the Start menu, select Programs.

The system displays the list of Program folders.

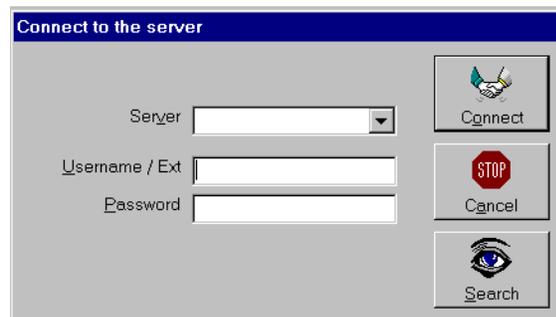
2. Select CenterPoint Solutions.
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist-MCR.

The system displays the initial agent login window.



This window is similar to the login window described in “Client PC Administration” in Chapter 3, “Agent Assist Administration”.

5. In the server field, select or type a Intuity CONVERSANT system from the drop-down menu. The system(s) listed are those connected through the local area network.

Click the Search button to search the network for valid Intuity CONVERSANT systems.

6. In the Username/Ext field, type your login name or extension identifier.
7. In the Password field, type your password.
8. Click the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

Once the agent is logged into the system, the system displays the Malicious Call Recording window.



### **Instant Access to the Malicious Call Recording Application**

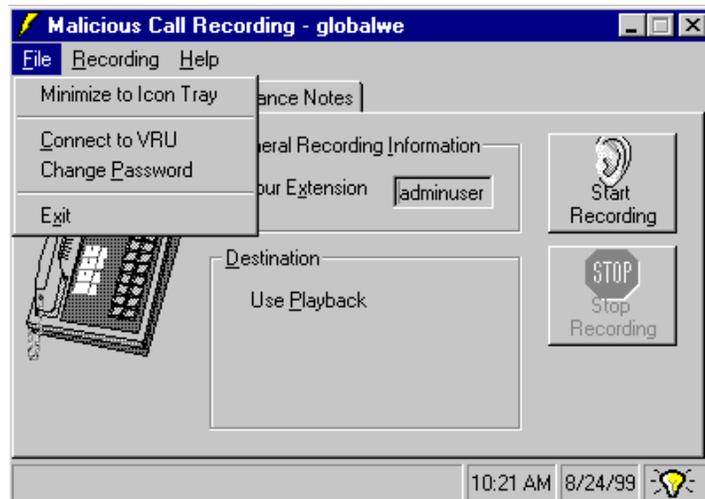
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During normal PC use, the M.C.R. application is not active. However, when desired, the agent will want quick access to the application. The Agent Assist software provides the capability of placing the M.C.R. icon in the icon tray at the bottom of the Windows screen.

Use the procedure below to create a “quick access” icon for M.C.R.:

1. Start at the Malicious Call Recording window.

From the File menu, select Minimize to Icon Tray.



The system minimizes the M.C.R. window from the desktop and provides an instant access icon (the lightning bolt) from the icon tray at the bottom of the Windows screen.



Click this icon at any time to initiate a Malicious Call Recording session.

## Using Malicious Call Recording

Use the procedure below to use the Malicious Call Recording application:

1. Click on the M.C.R. instant access icon (lightning bolt) from the icon tray at the bottom of the Windows screen.

The system displays the Malicious Call Recording window.



2. Click on the Recording Details tab to activate that portion of the window (if not already selected).
3. Click the Start Recording button to begin an M.C.R. session.



The M.C.R. session is active on the Intuity CONVERSANT system and the client PC until this same client PC terminates recording.

The status bar at the bottom of the window displays the recording ID of the call that is currently recording.



**⇒ NOTE:**

The Your Extension field displays the extension/login for your terminal. This may only be changed by the administrator. This extension is assigned during initial administration and is not administrable by the agent or supervisor.



4. Click the Stop Recording button when the conversation is over, or when you wish to stop recording.

**⚠ CAUTION:**

*The recording must be stopped to prevent unintentionally recording very long segments. In the event a M.C.R. event is initiated and not terminated for some reason, including the PC becoming unavailable to the network, Agent Assist will record a two hour block session for that Agent.*

## Enter Observation Notes

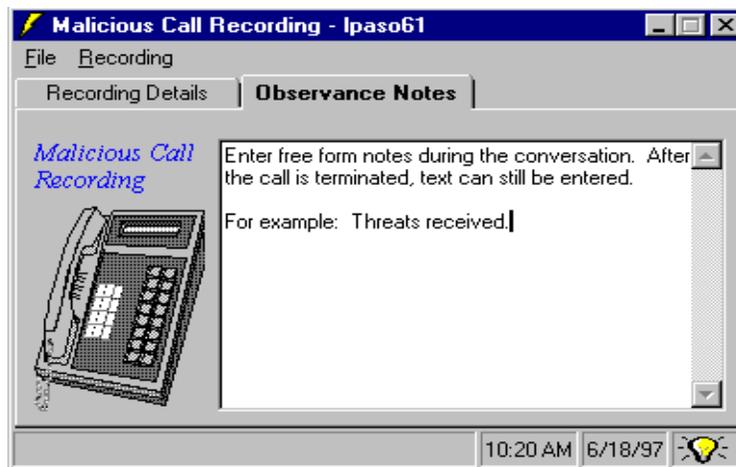
---

The M.C.R. application provides a window for the agent to enter observation notes either during or after the conversation.

These textual notes are stored in the Intuity CONVERSANT system and are associated with the recording.

Use the procedure below to enter text notes with an M.C.R. recording:

1. From the Malicious Call Recording window, click on the Observance Notes tab.
2. Type your notes in the text field.



3. When you have finished entering text, from the Recording menu, select Update Notes.



### NOTE:

Any text entered is displayed with the recording information in the Notes field of the Recording Retriever window.

## Recordings Retrieval

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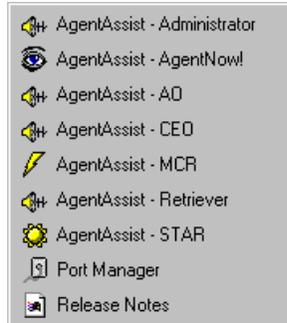
The Malicious Call Recording application does not allow retrieval of recordings from the client application. To gain access to these recordings use the Agent Assist Recording Retriever application.

Use the procedure below to use the Recording Retriever:

1. For Windows 95/98 or Windows NT, select Programs from the Start menu.  
The system displays the list of Program folders.
2. Select CenterPoint Solutions.

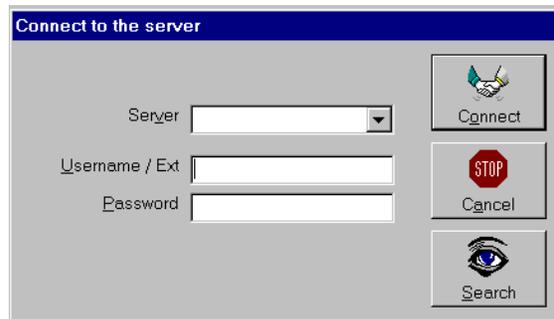
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist-Retriever.

The system displays the initial agent login window.



5. In the server field, select or type an Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network and are currently running Agent Assist Server Software.

Click the Search button to search the network for valid Intuity CONVERSANT systems.

6. In the Username/Ext field, type your login name or extension identifier.

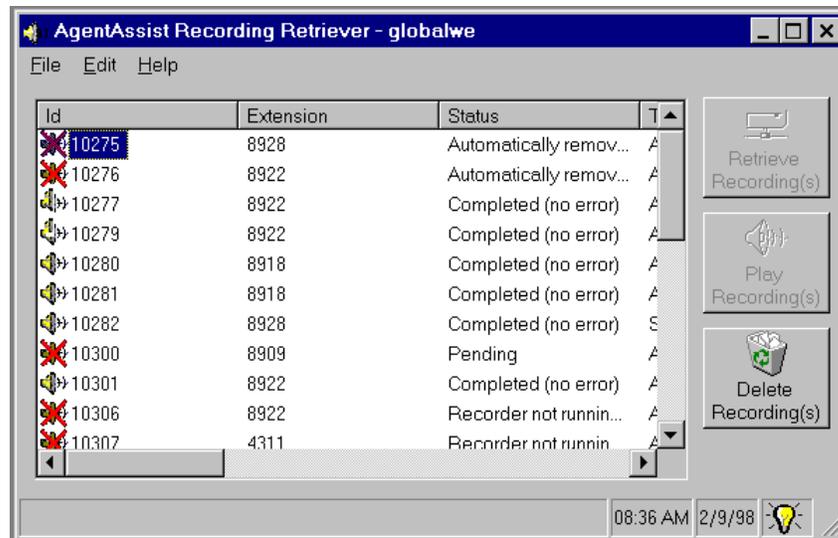
7. In the Password field, type your password.

8. Click the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The information from the Intuity CONVERSANT system is downloaded to the client PC for the application session.



Once you are logged into the system, the system displays the Recording Retriever window.



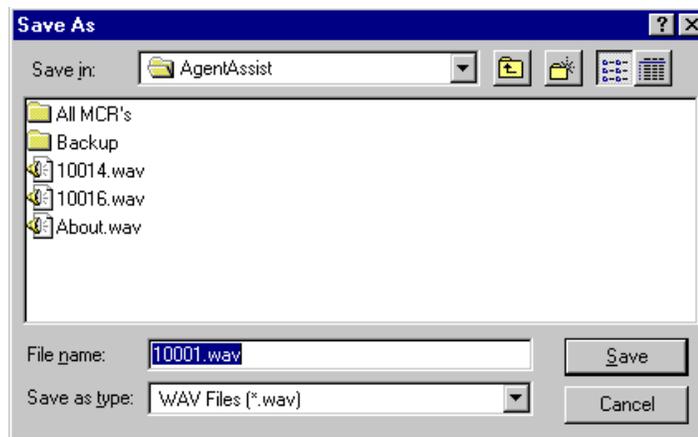
9. Highlight the recording(s) you wish to retrieve from the list in the window. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.



10. Click the Retrieve Recording button.

The system retrieves the CELP or ADPCM sound file from the Intuity CONVERSANT server.

The system displays the Save As window.



11. Select the location (folder or floppy diskette) to save the retrieved recording(s).

12. Choose from the following options:
  - If you have a CELP voice file player, select Edit|Use CELP Player to play CELP voice files to use the CELP player.
  - If you do *not* have a CELP voice file player the files automatically convert and save as a .wav file.
13. Click Save.



**NOTE:**

The Retrieve Recording(s) option is designed to retrieve only.

### Playback Recordings

---

There are two methods by which to playback recordings:

- Through the client PC (Multimedia player required).
- Through the Intuity CONVERSANT server via touch-tone telephone.

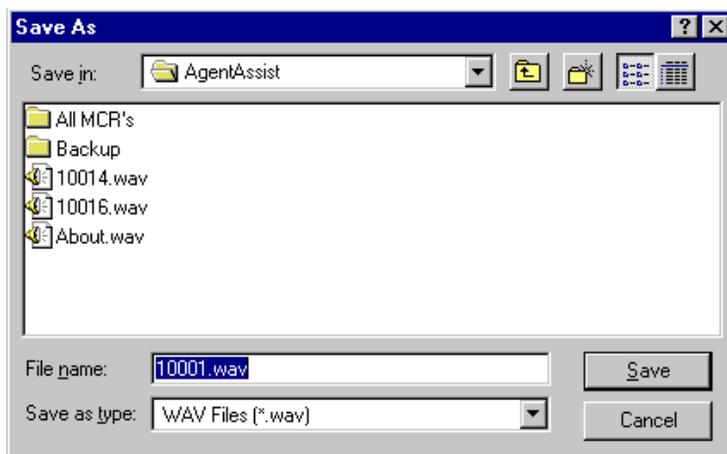
### Playback Recordings through the Client PC

Use this procedure to listen to completed recordings from the client PC:

1. Start at the Agent Assist Recording Retriever window. Highlight the recording(s) you wish to playback. Multiple recordings are selected by pressing and holding down the “Control” key while clicking on the desired recordings.
2. Click on the Play Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window:



3. Select the location (folder or floppy diskette) to save the retrieved recording(s) for playback.
4. Choose from the following options:
  - If you selected Edit|Use CELP Player to play CELP voice files, the CELP voice file player opens.
  - If you saved the file as a .wav file, your default Windows voice player opens.



**NOTE:**

CELP files are stored on the CONVERSANT system with an .lvp extension and use less hard drive space than .wav files.

The default multimedia recorder window is displayed and indicates at the top of the window which .wav file is currently present for playback.



5. Click the  button to listen to the recording.
6. Close the multimedia window or click on a .wav file from the Task bar to continue with playback(s).



**NOTE:**

If multiple recordings are retrieved for playback and you wish to listen to a specific .wav file, you may click on the specific .wav file from the Task Bar for playback.

## Playback Recordings through the Server

Use the following procedure to listen to completed recordings from a telephone:

1. Dial the telephone number corresponding to the channel assigned to Used for Playback on the Intuity CONVERSANT system. The Used for Playback Service must be assigned to the selected channel using the Port Manager. See "Assign Ports for Telephone Playback" page 3-29 for more information.
2. The supervisor will be prompted for their extension followed by the # key and password followed by the # key. Once connected to the Agent Assist Recording Player, the supervisor has the option to hear a specific recording or to a list of recordings for a given extension.

To listen to a specific recording:

- Enter the recording ID followed by the # key.

You hear the ID number, extension, date, and length of the recording and the actual recording.

To listen to a list of recordings for a given extension:

- Enter an agent extension number followed by the \* key.

You hear the ID number, extension, date, and length of the recording.

**⇒ NOTE:**

The supervisor password is identical to that assigned in the client application. As a result of the capability of accessing via a touch-tone phone, this password must be numeric.

### **Refresh Recordings**

---

To refresh recordings, from Recording menu, select Refresh. You may also press **(F5)** to refresh recordings. If any additional recordings have been scheduled or added, they now appear in the window.

### **Archive Recordings**

---

Files may be saved for later usage or editing. This is accomplished by storing them as a standard .wav file in a directory (or floppy diskette) located somewhere other than on the Intuity CONVERSANT system.

**⚠ CAUTION:**

*You should periodically remove recording from the Intuity CONVERSANT system to save space on the system disk.*

### **Delete Recordings**

---

Use the procedure below to delete recordings:

1. Start at the Agent Assist Recording Retriever window and select recording(s) from the list. To select multiple recordings, hold down the Control key while selecting recordings.
2. Click the Delete Recording button.



The audio portion of the recording(s) is permanently removed from the Intuity CONVERSANT system. The textual components of the message remain on the system.

**⚠ WARNING:**

*Once removed from the Intuity CONVERSANT system, the record cannot be retrieved unless previously stored on a floppy diskette or converted to a .wav file.*

---

# Customer Experience Observing

# 6

---

## Overview

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This chapter describes the Customer Experience Observing (C.E.O.) application. C.E.O. is one of two applications that initiate recording sessions on a scheduled basis (the other being Agent Observing - Chapter 4). As opposed to Agent Observing which records on an agent basis, C.E.O. the recordings are done on a per Vector Directory Number (VDN) basis.

**⇒ NOTE:**

A VDN is an extension that provides access to the Vectoring feature on the Lucent Technologies DEFINITY switch. Vectoring allows a customer to specify the treatment of incoming calls based on the dialed number.

## Purpose

---

The purpose of this chapter is to describe the Customer Experience Observing application, including an explanation of its use, the procedures to access and administer the application, and how to work with the resulting recordings.

## Customer Experience Observing Application

---

The Customer Experience Observing (C.E.O.) application allows a supervisor to schedule recordings of an entire call, from the time the caller enters the call center VDN, until the call is disconnected from the switch.

As opposed to recording the conversations specific to an agent, C.E.O. records all audio sessions the caller hears while processing in the vector directory number (VDN) of the DEFINITY switch. These audio sessions can include:

- Switch recorded announcements
- Music
- Voice response interactions
- Agent conversations
- Transferred and conference call conversation
- Progress tones such as busy, reorder, and ringing
- Switch call prompts and associated caller input

C.E.O. accomplishes this by bridging onto a VDN within the DEFINITY switch. The Intuity CONVERSANT system bridges onto individual calls as they reach the incoming VDN and continues recording until the call is terminated.

An optional warning tone may be administered on the switch to alert the caller at the conclusion of the vector processing that the conversation is being recorded. When administered, the DEFINITY switch continues to play the periodic tone throughout the duration of the call.

Instead of the periodic warning tone from the switch, you may consider playing a recorded warning announcement as the first step of the vector.

### CAUTION:

*The recording of telephone conversations is subject to federal, state, or local laws, rules or regulations and may be prohibited pursuant to the laws, rules, or regulations or require the consent of one or both of the parties to the conversation. Customers should familiarize themselves with and comply with all applicable law, rules and regulations before using these features.*

The basic use of the Customer Experience Observing application is represented by the following scenario:

1. A supervisor schedules recording times on a VDN basis using the client PC.
2. The schedules are “uploaded” into the Intuity CONVERSANT system.
3. The time to begin recording is reached and the Intuity CONVERSANT system:
  - a. Connects to the DEFINITY using an available, assigned port.
  - b. Outpulses the feature access code and the VDN.
  - c. Bridges onto the call and begins the recording for the specified time.

**⇒ NOTE:**

If the agent is already on a call at start time, that call will not be recorded. Customer Experience Observing records the next new call.

4. The recording stops and is stored on the Intuity CONVERSANT system in the Agent Assist recording files.
5. A supervisor retrieves and listens to messages specific to VDNs within their assignment.

VDN recording begins when the first call after the scheduled time enters the switch VDN. Furthermore, recording stops at the end of the allotted time, whether a single call, multiple calls, or call portions were handled during this period.

C.E.O. may observe consecutive VDN calls during the specified time interval. In other words, as long as the supervisor has scheduled C.E.O. for a particular VDN, the Intuity CONVERSANT system records that VDN until the session time expires.

### **C.E.O. Port Contention**

---

C.E.O. is one of the applications with a low priority to obtain a port on the Intuity CONVERSANT system.

**▲ CAUTION:**

*Any application with a higher port contention priority (Malicious Call Recording, AgentNow!, and S.T.A.R.) “bumps” C.E.O. off ports if no other facilities are available for use.*

See “Ports Usage” in Chapter 3, “Agent Assist Administration”, for more information about port assignments.

## Using C.E.O.

---

C.E.O. recordings are administered by scheduling recordings using the client PC interface. The schedules are then “uploaded” into the Intuity CONVERSANT system where a background process handles the triggering of recordings.

Use the procedure below to administer the C.E.O. application:

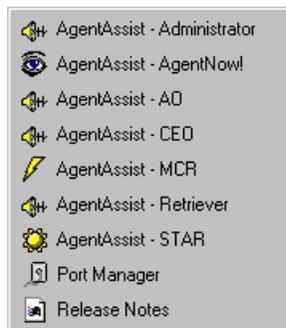
1. Windows 95/98 or Windows NT: From the Start menu, select Programs.

The system displays the list of Program folders.

2. Select CenterPoint Solutions.

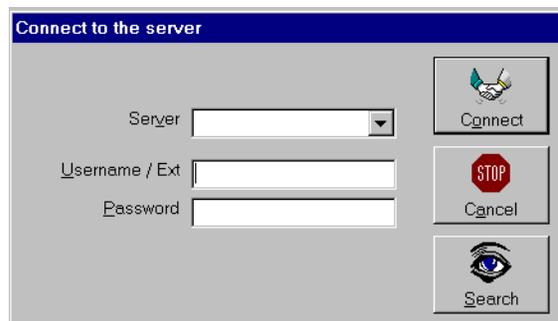
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist-CEO.

The system displays the initial supervisor login window.



This window is similar to the login window described in “Client PC Administration” in Chapter 3, “Agent Assist Administration”. Passwords are all assigned in the Administration menu.

5. In the Server field, select or type a Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network and are currently running Agent Assist Server Software.



Click the Search button to search the network for valid Intuity CONVERSANT systems.

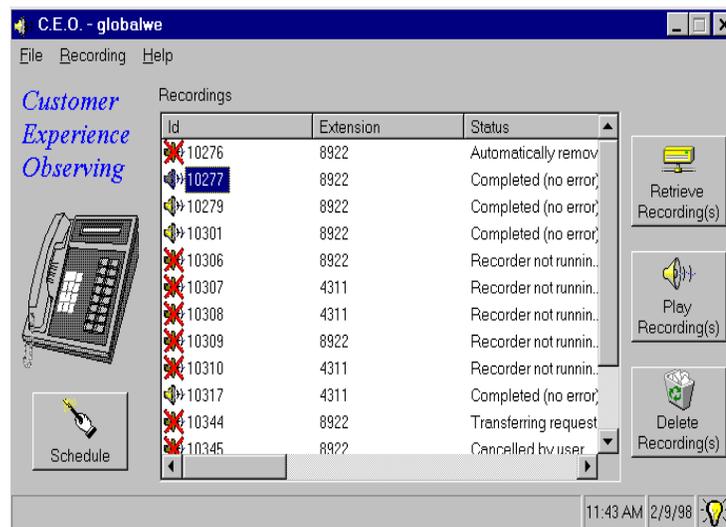
6. In the Username/Ext field, type your login name or extension identifier.
7. In the Password field, type your password.



8. Click the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The information from the Intuity CONVERSANT system is downloaded to the client PC for the administration session.

The system displays the C.E.O. window.



## C.E.O. Schedule Wizard

C.E.O. recordings are scheduled via the scheduling "wizard". The wizard is used to schedule either a single event, at a specific time, or multiple events. The wizard provides an easy to use step-by-step method for creating recording requests.

### Scheduling One Agent/One Recording

The Scheduling Wizard allows the supervisor to schedule a single recording for a specific agent at a designated time.

Use the procedure below to schedule using the Schedule Wizard:

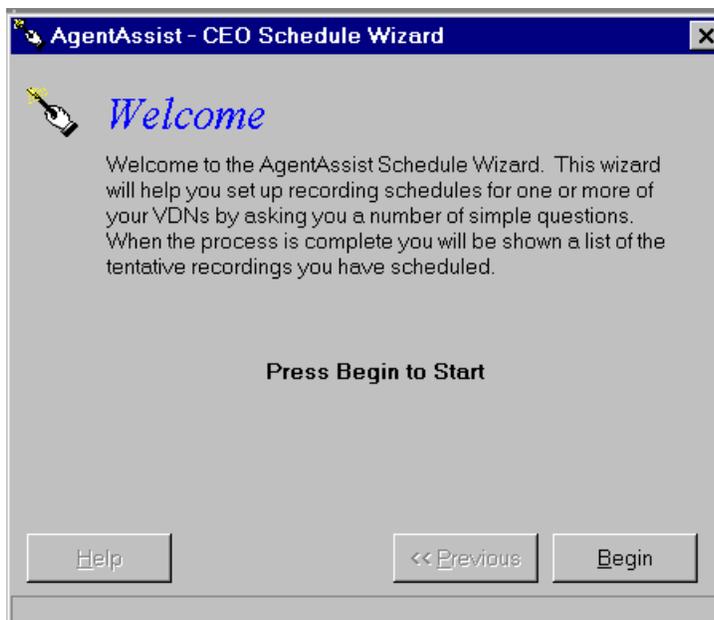
1. Select the Schedule Wizard from the Recording menu or click the Schedule icon on the C.E.O. window.



**NOTE:**

Supervisors may only schedule and retrieve recordings for VDNs assigned to them in the administration section of the Agent Assist features. See “Agent Administration” and “Supervisor Administration” in Chapter 3, “Agent Assist Administration” for more information about administering agents and supervisors.

The system displays the initial Wizard window.



2. Click Begin to start.

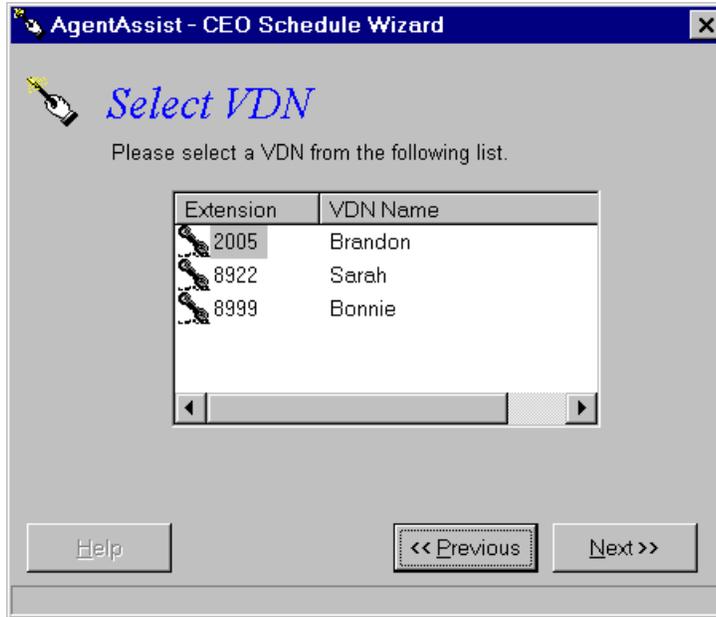


**⇒ NOTE:**

Multiple VDNs/Multiple Recordings allows the supervisor to set schedule parameters and build random schedules of recordings or VDNs based on recording hours.

3. Select One VDN/One Recording. This allows the supervisor to schedule a single recording at a specified time.

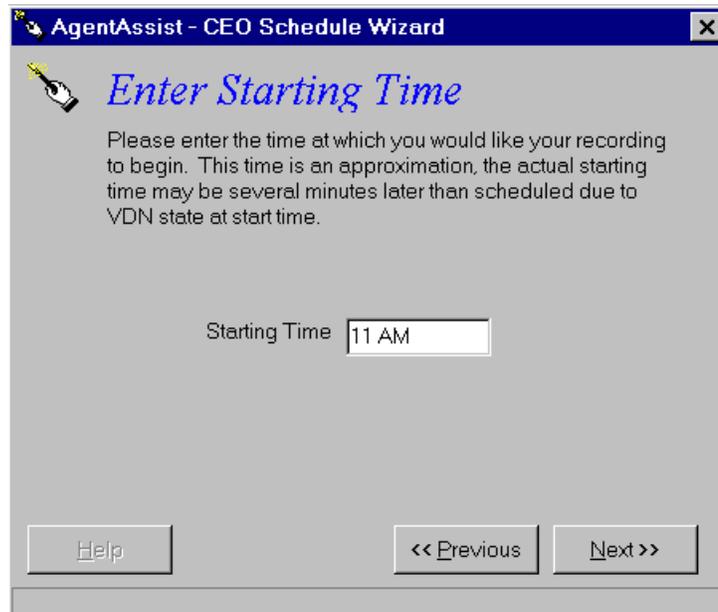
The system lists the Available Extension/Agent Name.



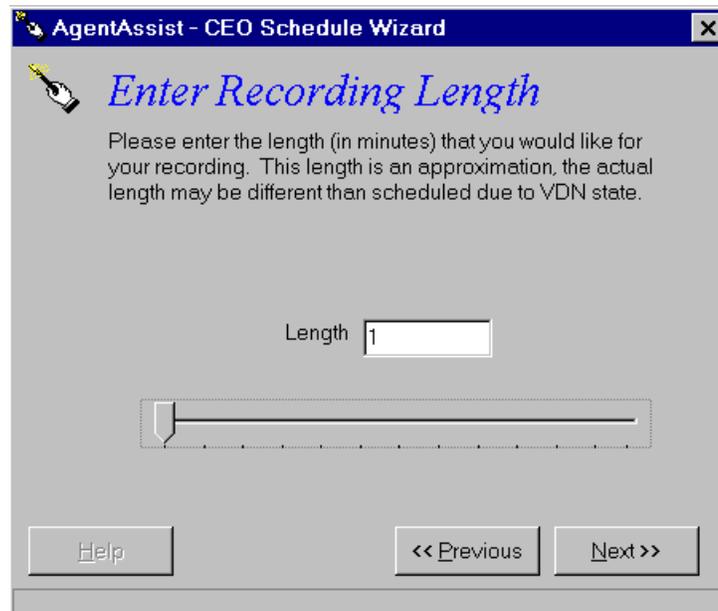
4. Select the Extension/VDN Name to schedule a single recording session. Click Next to continue.



5. Select the recording start date from the calendar. Click Next to continue.



6. Enter the start time for the recording to begin. Click Next to continue.



7. Use the slide bar or type in the recording length in minutes (maximum 60 minutes). Click Next to continue.

Length (in minutes) — The maximum number of minutes for which an individual VDN recording session is active. During this period, multiple calls to the VDN may be recorded. The valid time range is 1 minute to 60 minutes (one hour).

**⚠ CAUTION:**

*The recording length impacts the amount of hard disk space needed on the system to store recordings. If you choose to create long recordings, and proper fill management is not performed, you run the risk of filling the hard disk. See the documentation provided with your Intuity CONVERSANT system for specific information about hard disk storage space.*

**⇒ NOTE:**

Recording does not stop if there is continuous silence between calls to a specific VDN. Recording continues for the entire interval administered when the event was scheduled.

The system displays a screen with a list of tentatively scheduled recordings.

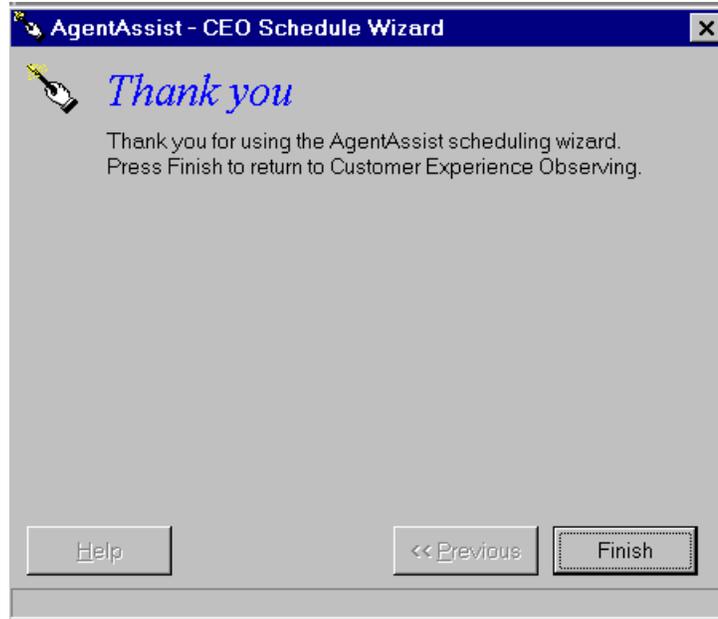


8. Click Schedule to confirm and complete the schedule.

**⇒ NOTE:**

If you are not satisfied with the schedule assigned by the system, you may back up to the previous steps to create a new schedule.

Once the schedule has been completed, the scheduling confirmation screen is presented.



9. Click Finish to complete the Schedule Wizard session.

### Multiple VDNs/Multiple Recordings

Multiple VDNs/Multiple Recordings allows the supervisor to set schedule parameters and build random schedule.

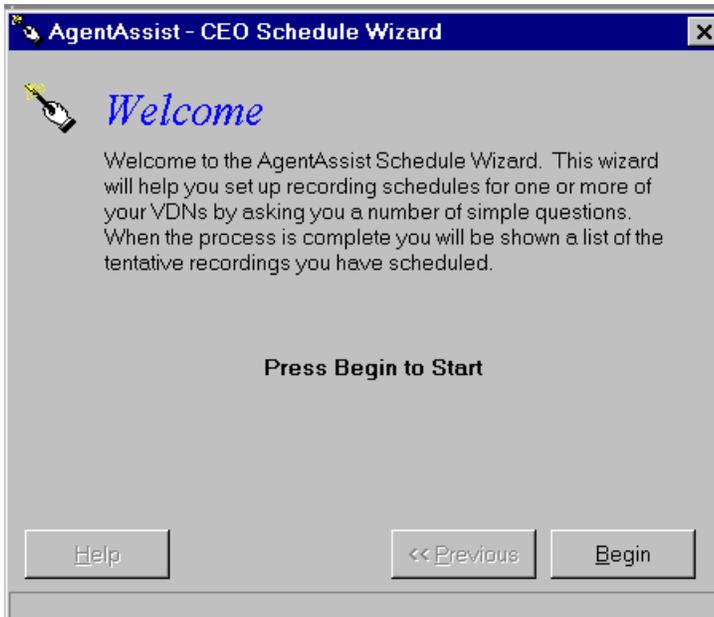
1. Select the Schedule Wizard from the Recording menu or click the Schedule icon on the C.E.O. window.



**NOTE:**

Supervisors may only schedule and retrieve recordings for VDNs assigned to them in the administration section of the Agent Assist features. See "Agent Administration" and "Supervisor Administration" in Chapter 3, "Agent Assist Administration" for more information about administering agents and supervisors.

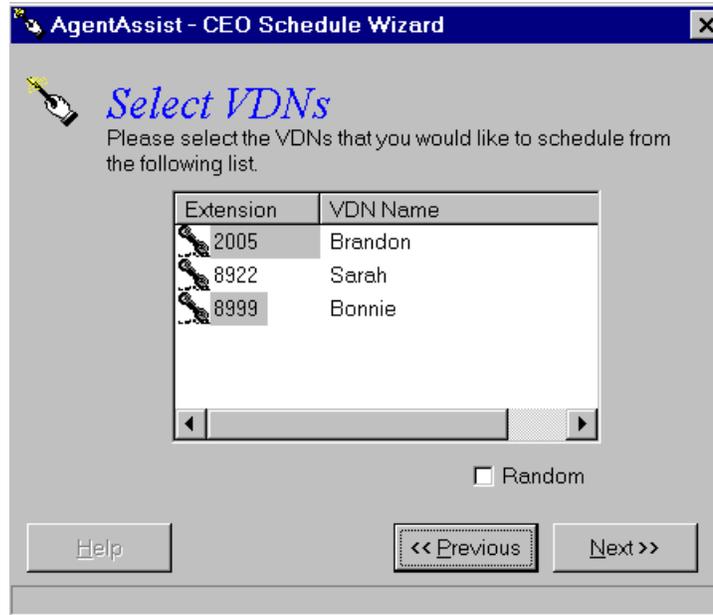
The system displays the initial Wizard window.



2. Click Begin to start.



3. Select Multiple VDNs/Multiple Recordings. Click Next to continue



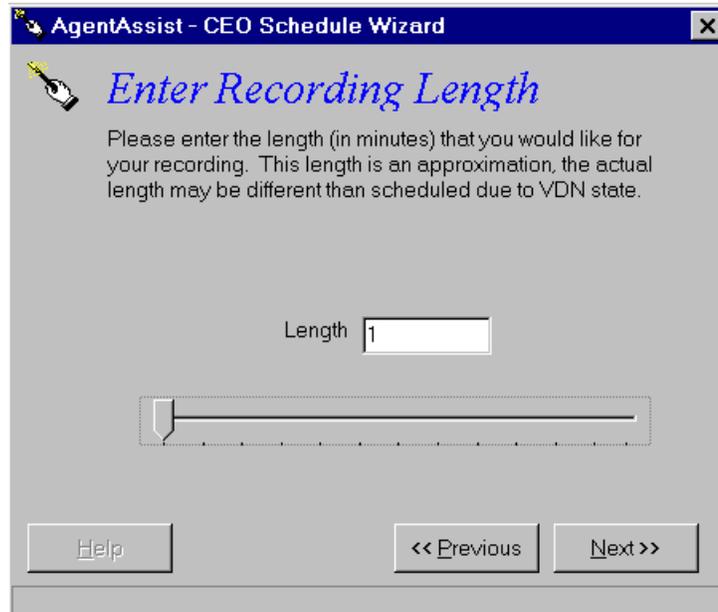
4. Multiple VDNs are selected by pressing and holding down the "Control" key while selecting the VDNs to be scheduled. After selecting the appropriate VDNs, click Next to continue.
5. Random — Check the Random box to include all displayed VDNs in the scheduling. When you select Random, all displayed VDNs may be sampled during the period assigned in the Scheduling tab of this window. The number of samples assigned in the # Recordings field is performed until the session is complete.



6. Select the recording start date from the calendar. Click Next to continue.



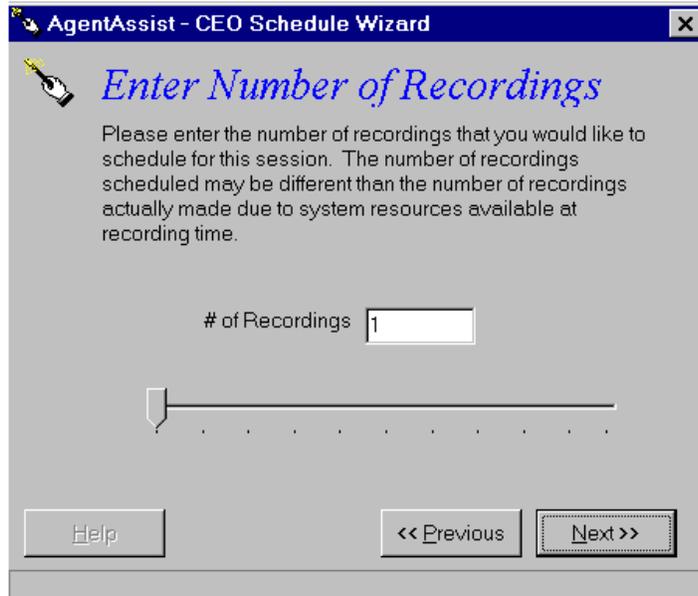
7. Select the recording ending date from the calendar. Click Next to continue.



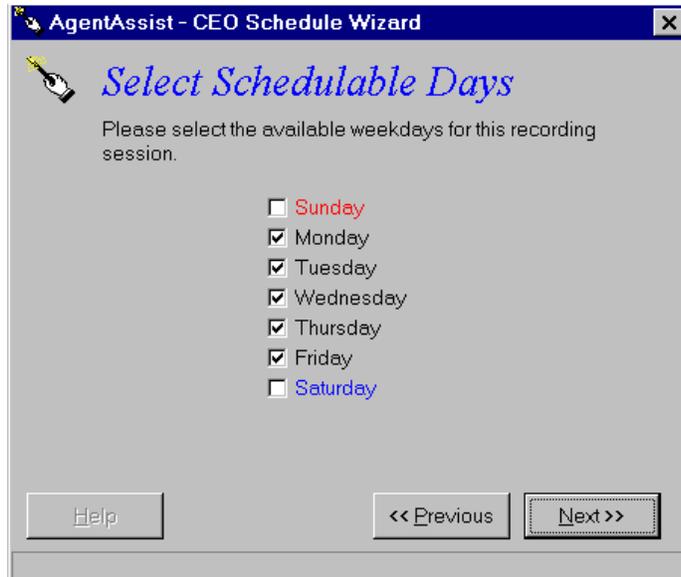
8. Use the slide bar or type in the recording length in minutes (maximum of 60 minutes). Click Next to continue.

**⚠ CAUTION:**

*The recording length impacts the system hard disk space used to store recordings. If you create long recordings and do not perform proper fill management, you may fill the hard disk. See the Intuity CONVERSANT system documentation for specific information about hard disk storage space.*



9. Use the slide bar or type in the number of recordings you would like to schedule. Click Next to continue



10. Select the day(s) of the week for the recordings. Click Next to continue.

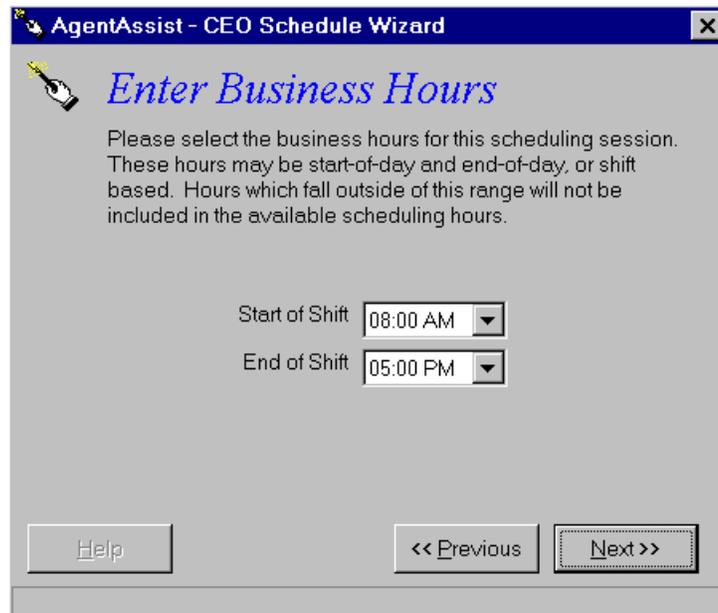


11. Select Yes to include holidays or No to exclude holidays. Click Next to continue.



**NOTE:**

Holidays are set in the Agent Assist Administrator.



12. Select the business hours for this scheduling session from the following screen. Click Next to continue.



13. Select the start times for the scheduled recordings. Click Next to continue.



14. The previous screen displays a tentative recording schedule of VDNs and the time scheduled for the recording of each VDN. Click Schedule to confirm and complete the schedule.

Once the schedule has been completed, the scheduling confirmation screen is presented.

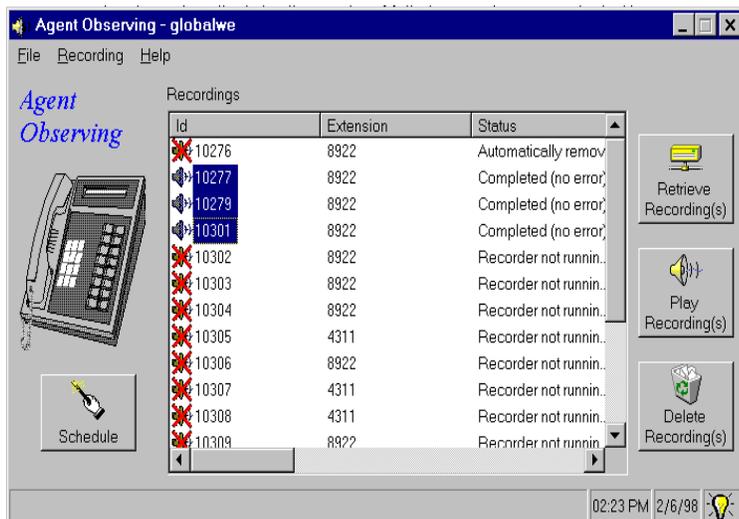


15. Click Finish to complete the Schedule Wizard session.

## **Recordings Retrieval**

Use the procedure below to retrieve C.E.O. recordings:

1. Start at the C.E.O. window. Highlight the recording(s) you wish to retrieve from the list in the window. Multiple recordings are selected by pressing and holding down the "Control" key while clicking on the desired recordings.



**NOTE:**

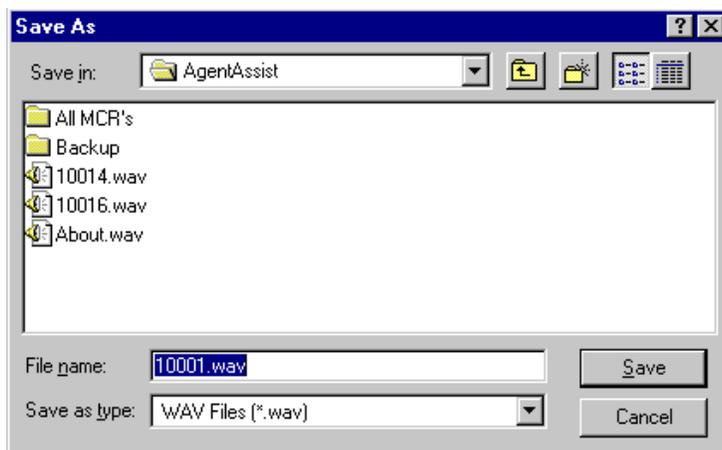
You can also use the Recordings tab of the Agent Assist Administrator as described in Chapter 3, page 3-49.

You may only retrieve those recordings that have an associated voice file (completed without errors).

2. Click the Retrieve Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window:



3. Select the location (folder or floppy diskette) to save the retrieved recording(s).

4. Choose from the following options:
  - If you have a CELP voice file player, select Recordings|Use CELP Player to play CELP voice files to use the CELP player.
  - If you do *not* have a CELP voice file player the files automatically convert and save as a .wav file.
5. Click Save.



**NOTE:**

The Retrieve Recording(s) option is designed to retrieve only.

### Playback Recordings

There are two methods by which to playback recordings:

- Through the client PC (Multimedia player required)
- Through the Intuity CONVERSANT server via a touch-tone telephone

### **Playback Recordings through the Client PC**

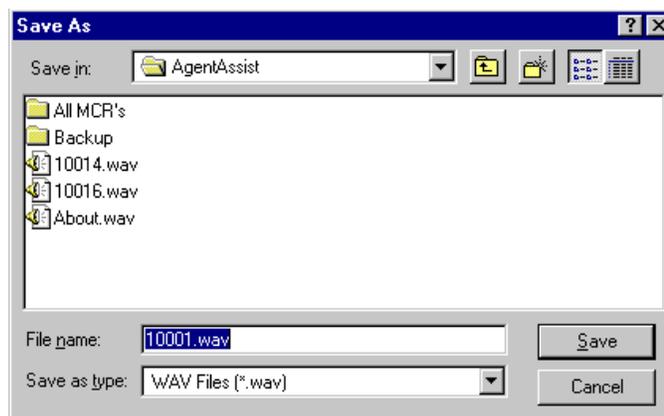
Use this procedure to listen to completed recordings from the client PC:

1. Start at the C.E.O. window. Highlight the recording(s) you wish to playback. Multiple recordings are selected by pressing and holding down the "Control" key while clicking on the desired recordings.
2. Click the Play Recording(s) button.



The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window.



3. Select the location (folder or floppy diskette) to save the retrieved recording(s) for playback.

4. Choose from the following options:
  - If you selected Recordings|Use CELP Player to play CELP voice files, the CELP voice file player opens.
  - If you saved the file as a .wav file, your default Windows voice player opens.

**⇒ NOTE:**  
CELP files are stored on the CONVERSANT system with an .lvp extension and use less hard drive space than .wav files.

The default multimedia recorder window is displayed and indicates at the top of the window which .wav file is currently present for playback.



5. Click the  button to listen to the recording.
6. Close the multimedia window or click a .wav file from the Task bar to continue with playback(s).

**⇒ NOTE:**  
If multiple recordings are retrieved for playback and you wish to listen to a specific .wav file, you may click the specific .wav file from the Task Bar for playback.

### Playback Recordings through the Server

Recorded messages can also be played using the telephone to access the server directly by entering the recording ID number or the extension on which the recording was made.

Use the procedure below to listen to completed recordings from a telephone:

1. Dial the telephone number corresponding to the channel assigned to Used for Playback on the Intuity CONVERSANT system. The Used for Playback Service must be assigned to the selected channel using the Port Manager. See "Assign Ports for Telephone Playback" page 3-29 for more information.
2. The supervisor will be prompted for their extension followed by the # key and password followed by the # key. Once connected to the Agent Assist Recording Player, the supervisor has the option to hear a specific recording or a list of recording IDs for a given extension.

To listen to a specific recording:

- Enter the recording ID followed by the # key.

You hear the ID number, extension, date, and length of the recording and the actual recording.

To listen to a list of recordings for a given extension:

- Enter an agent extension number followed by the \* key.

You hear the ID number, extension, date, and length of the recording.

 **NOTE:**

The supervisor password is identical to that assigned in the client application. As a result of the capability of accessing via a touch-tone phone, this password must be numeric.

## Refresh Recordings

To refresh recordings, from Recording menu, select Refresh. You may also press **F5** to refresh recordings. If any additional recordings have been scheduled or added, they now appear in the window.

## Delete Recordings

Start at the C.E.O. window. Select the session(s) from the scheduled recording list. Multiple sessions are selected by holding down the "Control" key and clicking on the session(s) from the recording list. Click the Delete Recording(s) button. The system sends a message to the Intuity CONVERSANT system to remove the session(s) from the scheduled list.

 **NOTE:**

You can also use the Delete button on the Recordings window of the Agent Assist Administrator, as described in "Delete Recordings", in Chapter 3, "Agent Assist Administration".

 **WARNING:**

*Once removed from the Intuity CONVERSANT system, the record cannot be retrieved unless previously stored on a floppy diskette or converted to a .wav file.*

## Unschedule Recordings

To "Unschedule" a recording(s), select the session(s) from the scheduled recording list and select Recordings|Unschedule. Multiple sessions are selected by holding down the "Control" key and clicking on the session(s) from the

recording list. The system sends a message to the Intuity CONVERSANT system to remove the session(s) from the scheduled list. A confirmation screen appears for the unschedule procedure.

 **NOTE:**

Only sessions scheduled for a future time that have pending status may be unscheduled.

### **Archive Recordings**

---

Files may be saved for later usage or editing. This is accomplished by storing them as a standard .wav file in a directory (or floppy diskette) located somewhere other than on the Intuity CONVERSANT system.

 **CAUTION:**

*It is highly recommended that recordings are periodically removed from the Intuity CONVERSANT system to save space on the system disk.*

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# Spontaneous Telephony Agent Recording (S.T.A.R.)

# 7

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## Overview

This chapter describes the Spontaneous Telephony Agent Recording (S.T.A.R.) application. S.T.A.R. is one of three “on-demand” applications used by an agent to create recordings. “On-demand” refers to the ability to begin recording immediately from an Agent Assist client PC by clicking the appropriate application icons. The intent of S.T.A.R. is to provide a “friendly” recording mechanism of calls when the calling party is aware they are being recorded. The other two On-demand applications are M.C.R. and AgentNow!

## Purpose

The purpose of this chapter is to describe the Spontaneous Telephony Agent Recording application, including an explanation of its use, the procedures to access and administer the application, and how to work with the resulting recordings.

## Spontaneous Telephony Agent Recording Application

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The Spontaneous Telephony Agent Recording (S.T.A.R.) application works much the same as the Malicious Call Recording application, in that it allows an agent to record a conversation on-demand. The primary difference is the fact that the user may enter data into one or more of ten pre-defined user fields. This data is stored for later retrieval by external sources.

The basic use of the S.T.A.R. application is represented by the following scenario:

1. An agent decides to record a conversation.
2. The agent starts the S.T.A.R. application, and after logging in, clicks on the Start Recording button.
3. A message is sent to the Intuity CONVERSANT system and bridges on to the call and records the conversation.
4. Recording continues until the agent clicks the Stop Recording button.
5. The agent may use the Observance Notes tab to enter text information about the call.
6. The recording is stored for later retrieval.

 **NOTE:**

If S.T.A.R. is the only Agent Assist application installed on a PC, the Recording Retriever must also be installed to manage recordings.

### S.T.A.R. Port Contention

---

S.T.A.R. has a medium priority in obtaining a port on the Intuity CONVERSANT system. Once a S.T.A.R. session is started, recording begins on the Intuity CONVERSANT system regardless of agent disposition.

The S.T.A.R. application takes precedence over port usage when simultaneous requests are made for Agent Observing and C.E.O. sessions. That is, S.T.A.R. “bumps” Agent Observing and C.E.O. applications off ports if no other facilities are available for use. However, S.T.A.R. *does not* interrupt an Intuity CONVERSANT system application that is physically assigned to a system port.

 **NOTE:**

Malicious Call Recording has the highest priority of the five Agent Assist applications in obtaining a port on the Intuity CONVERSANT system.

See “Ports Usage” in Chapter 3, “Agent Assist Administration”, for more information about port assignments.

## Accessing S.T.A.R.

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When using S.T.A.R., you will want to access the application as quickly as possible to record a call. Thus, it is important for agents to log in to S.T.A.R. before they begin to take calls. Use the procedures below to log in and create an instant access icon to the S.T.A.R. application.

### Log in to Spontaneous Telephony Agent Recording

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Use the procedure below to log in to the S.T.A.R. application:

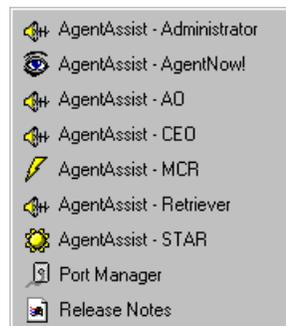
1. For Windows 95/98 or Windows NT, select Programs from the Start menu.

The system displays the list of Program folders.

2. Select CenterPoint Solutions.

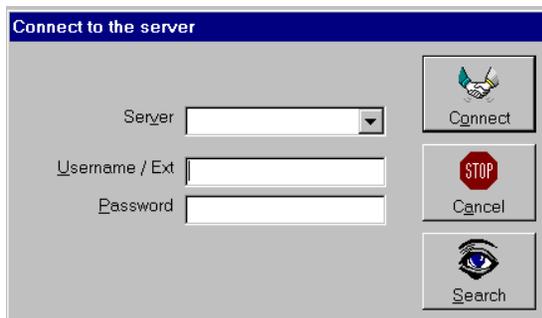
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist-STAR.

The system displays the initial agent login window.



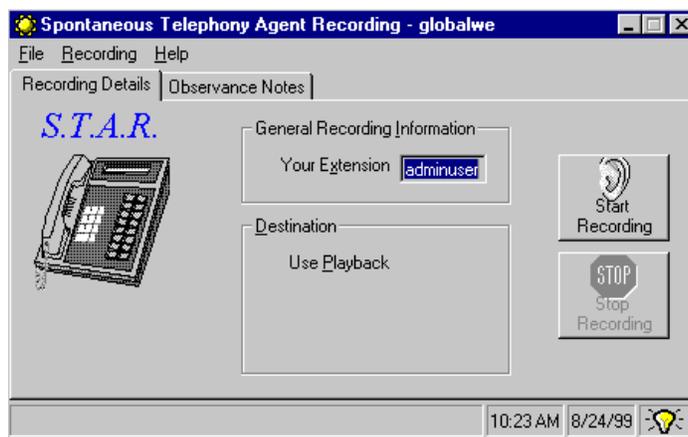
This window is similar to the login window described in "Client PC Administration" in Chapter 3, "Agent Assist Administration".

5. In the Server field, select or type a Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network and are currently running Agent Assist Server Software.

Click on the Search button to search the network for valid Intuity CONVERSANT systems.

6. In the Username/Ext field, type your login name or extension identifier.
7. In the Password field, type your password.
8. Click on the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

Once the agent is logged into the system, the system displays the S.T.A.R. window.

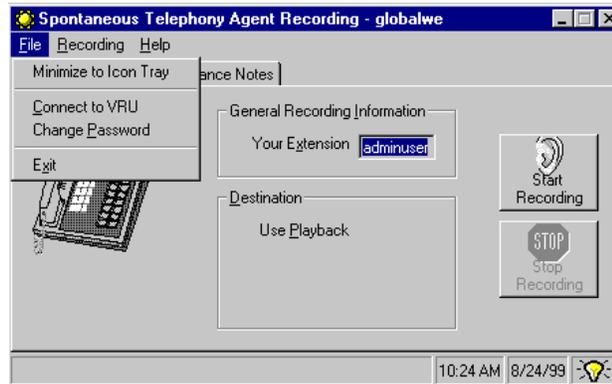


### Instant Access to the S.T.A.R. Application

During normal PC use, the S.T.A.R. application is not active. However, when desired, the agent will want quick access to the application. The Agent Assist software provides the capability of placing the S.T.A.R. icon in the icon tray at the bottom of the Windows screen.

Use the procedure below to create a “quick access” icon for S.T.A.R.:

1. Start at the Spontaneous Telephony Agent Recording window and from the File menu, select Minimize to Icon Tray.



The system removes the S.T.A.R. window from the desktop and provides and instant access icon (the star) from the icon tray at the bottom of the Windows screen.



Click this icon at any time to initiate a S.T.A.R. recording session.

## Using Spontaneous Telephony Agent Recording

Use the procedure below to use the Spontaneous Telephony Agent Recording application:

1. Click on the S.T.A.R. instant access icon (the star) from the icon tray at the bottom of the Windows screen.

The system displays the S.T.A.R. window.



2. Click on the Recording Details tab to activate that portion of the window.
3. Press the Start Recording button to begin a S.T.A.R. session.

The S.T.A.R. session is active on the Intuity CONVERSANT system and the client PC.

The status bar at the bottom of the window displays the recording ID of the call that is currently recording.



### ⇒ NOTE:

The Your Extension field displays the extension/login for your terminal. This may only be changed by the administrator. This extension is assigned during initial administration and is not administrable by the agent or supervisor.

4. Press the Stop Recording button when the conversation is over, or when you wish to stop recording.



## Entering Observance Notes

---

The S.T.A.R. application provides a window for the agent to enter Observance Notes either during or after the conversation.

These textual notes are stored in the Intuity CONVERSANT system and are associated with the recording.

Use the procedure below to enter text notes with a S.T.A.R. recording:

1. From the S.T.A.R. window, click on the Observance Notes tab.
2. Type your notes in the text fields.

The Observance Notes tab is customized information entered to identify the unique type of recording session. See Chapter 3, "Agent Assist Settings Administration" page 3-32, to set up these fields.



3. When you have finished entering notes, from the Recording menu, select the Update button.



### NOTE:

Any text entered is displayed with the recording information in the Notes field of the Recording Retriever window.

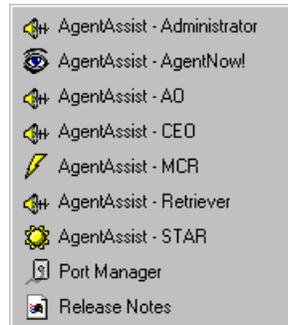
## Recordings Retrieval

---

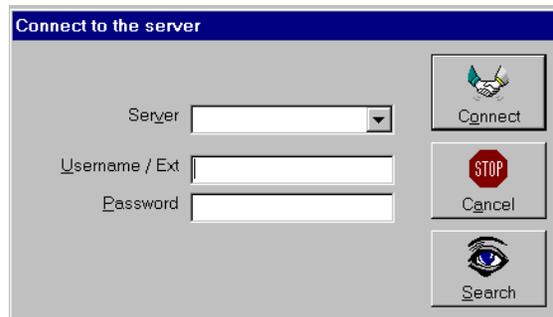
The S.T.A.R. application does not allow retrieval of recordings from the client application. To listen to these recordings use the Agent Assist Recording Retriever.

Use the procedure below to use the Recording Retriever:

1. For Windows 95/98 or Windows NT, select Programs from the Start menu.  
The system displays the list of Program folders.
2. Select CenterPoint Solutions.
3. Select Agent Assist.  
The system displays the list of applications.



4. Select AgentAssist-Retriever.  
The system displays the initial agent login window.



5. In the server field, select or type a Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network and are currently running Agent Assist Server Software.

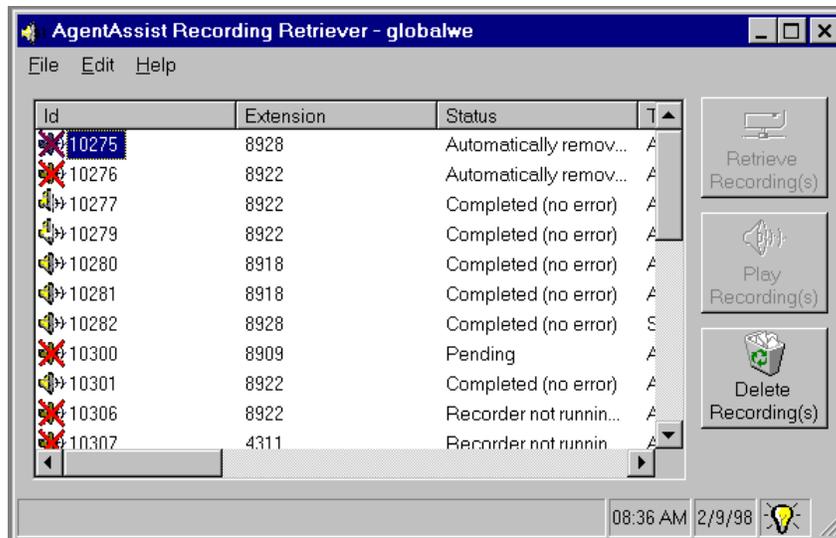
Click the Search button to search the network for valid Intuity CONVERSANT systems.

6. In the Username/Ext field, type your login name or extension identifier.
7. In the Password field, type your password.
8. Click the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The information from the Intuity CONVERSANT system is downloaded to the client PC for the application session.



Once you are logged into the system, the system displays the Recording Retriever window.



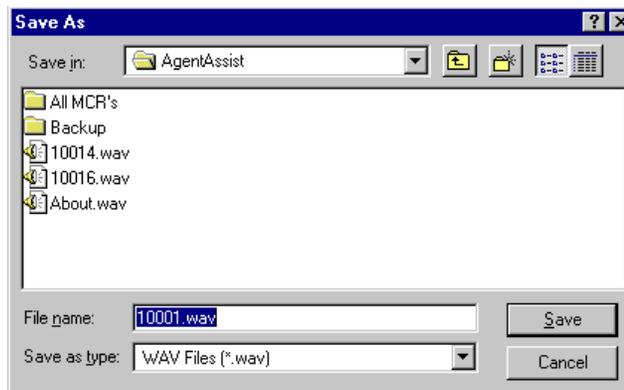
9. Highlight the recording(s) you wish to retrieve from the list in the window. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.

10. Click the Retrieve Recording button.



The system retrieves the CELP or ADPCM sound file from the Intuity CONVERSANT server.

The system displays the Save As window.



11. Select the location (folder or floppy diskette) to save the retrieved recording(s).

12. Choose from the following options:
  - If you have a CELP voice file player, select Edit|Use CELP Player to play CELP voice files to use the CELP player.
  - If you do *not* have a CELP voice file player the files automatically convert and save as a .wav file.
13. Click Save.



**NOTE:**

The Retrieve Recording(s) option is designed to retrieve only.

## Playback Recordings

---

There are two methods by which to playback recordings:

- Through the client PC (Multimedia player required)
- Through the Intuity CONVERSANT server

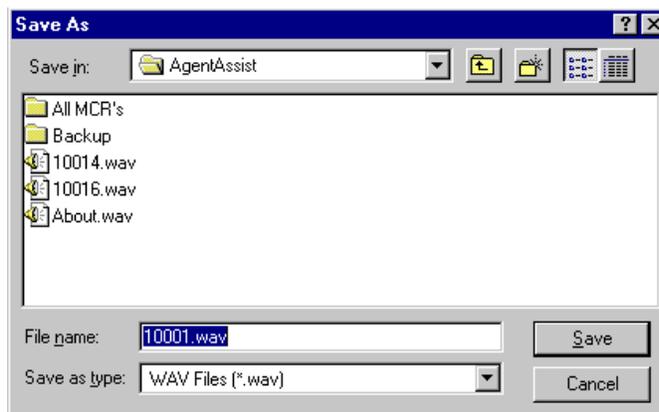
### Playback Recordings through the Client PC

Use this procedure to listen to completed recordings from the client PC:

1. Start at the Agent Assist Recording Retriever window. Highlight the recording(s) you wish to playback. Multiple recordings are selected by pressing and holding down the “Control” key while clicking on the desired recordings.
2. Click on the Play Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window:



3. Select the location (folder or floppy diskette) to save the retrieved recording(s) for playback.



4. Choose from the following options:

- If you selected Edit|Use CELP Player to play CELP voice files, the CELP voice file player opens.
- If you saved the file as a .wav file, your default Windows voice player opens.

**⇒ NOTE:**

CELP files are stored on the CONVERSANT system with an .lvp extension and use less hard drive space than .wav files.

The default multimedia recorder window is displayed and indicates at the top of the window which .wav file is currently present for playback.



5. Click the  button to listen to the recording.
6. Close the multimedia window or click on a .wav file from the Task bar to continue with playback(s).

**⇒ NOTE:**

If multiple recordings are retrieved for playback and you wish to listen to a specific .wav file, you may click on the specific .wav file from the Task Bar for playback.

### Playback Recordings through the Server

Recorded messages can also be played using the telephone to access the server directly by entering the recording ID number or the extension on which the recording was made.

Use the procedure below to listen to completed recordings from a telephone:

1. Dial the telephone number corresponding to the channel assigned to Used for Playback on the Intuity CONVERSANT system. The Used for Playback Service must be assigned to the selected channel using the Port Manager. See "Assign Ports for Telephone Playback" on page 3-29 for more information.
2. The supervisor will be prompted for their extension followed by the # key and password followed by the # key. Once connected to the Agent Assist Recording Player, the supervisor has the option to hear a specific recording or a list of recording IDs for a given extension.

To listen to a specific recording:

- Enter the recording ID followed by the # key.

You hear the ID number, extension, date, and length of the recording and the actual recording.

To listen to a list of recordings for a given extension:

- Enter an agent extension number followed by the \* key.

You hear the ID number, extension, date, and length of the recording.

 **NOTE:**

The supervisor password is identical to that assigned in the client application. As a result of the capability of accessing via a touch-tone phone, this password must be numeric.

### Refresh Recordings

To refresh recordings, from Recording menu, select Refresh. You may also press **F5** to refresh recordings. If any additional recordings have been scheduled or added, they now appear in the window.

### Archive Recordings

Files may be saved for later usage or editing. This is accomplished by storing them as a standard .wav file in a directory (or floppy diskette) located somewhere other than on the Intuity CONVERSANT system.

 **CAUTION:**

*You should periodically remove recordings from the Intuity CONVERSANT system to save space on the system disk.*

## Delete Recordings

---

Use the procedure below to delete recordings:

1. Start at the Agent Assist Recording Retriever window and select recording(s) from the list. To select multiple recordings, hold down the Control key while selecting recordings.
2. Click the Delete Recording button.



Both the recording and any associated notes are permanently removed from the Intuity CONVERSANT system.

**⚠ WARNING:**

*Once removed from the Intuity CONVERSANT system, the record cannot be retrieved unless previously stored on a floppy diskette or converted to a .wav file.*



## **Overview**

---

This chapter describes the AgentNow! application. AgentNow! is used by supervisors to create recordings of a specific agent on demand. The intent of AgentNow! is to provide supervisors with a mechanism of recording conversations of agents assigned to them on an immediate basis.

AgentNow! is one of three “on-demand” applications used to create recordings. “On-demand” refers to the ability to begin recording immediately from an Agent Assist client PC by clicking the appropriate application icons. The other two On-demand applications are M.C.R. and S.T.A.R.

## **Purpose**

---

The purpose of this chapter is to describe the AgentNow! application, including an explanation of its use, the procedures to access and administer the application, and how to work with the resulting recordings.

## AgentNow! Application

---

The AgentNow! application works much the same as Malicious Call Recording and S.T.A.R., in that it allows the user to record a conversation on-demand. The primary difference is that AgentNow! is used by a supervisor to perform an immediate recording session on an assigned agent.

### CAUTION:

*This feature is intended for supervisor use only. Caution should be taken during initial administration to prohibit non-authorized users from recording conversations. See "Agent Administration" and "Supervisor Administration" in Chapter 3, "Agent Assist Administration", for more information about administering agents and supervisors.*

The basic use of the AgentNow! application is represented by the following scenario:

1. A supervisor decides to record an agent's conversation.
2. The supervisor starts the AgentNow! application, and after logging in, selects an agent from a pull-down list of agent extensions assigned to that supervisor.
3. The supervisor clicks on the Start Recording button.
4. A message is sent to the Intuity CONVERSANT system and bridges on to the call and records the conversation.
5. Recording continues until the agent clicks the Stop Recording button.
6. The supervisor may use the Observance Notes tab to enter text information about the call.
7. The recording is stored for later retrieval.

### NOTE:

If AgentNow! is the only Agent Assist application installed on a PC, the Recording Retriever must also be installed to manage recordings.

## AgentNow! Port Contention

---

Of the Agent Assist applications, AgentNow! has a high priority in obtaining a port on the Intuity CONVERSANT system. Once the AgentNow! session is started, recording begins on the Intuity CONVERSANT system regardless of Agent disposition.

The AgentNow! application takes precedence over port usage when simultaneous requests are made for Agent Observing, C.E.O. or S.T.A.R. sessions. AgentNow! "bumps" any other Agent Assist application off ports if no other facilities are available for use. However, AgentNow! *does not* interrupt an Intuity CONVERSANT system application that is physically assigned to a system port.

See “Ports Usage” in Chapter 3, “Agent Assist Administration”, for more information about port assignments.

## **Accessing AgentNow!**

---

When using AgentNow!, you will want to access the application as quickly as possible to record an agent’s call.

Thus, it may be desirable for supervisors to log into AgentNow! before they wish to record an agent. Use the procedures below to log in and create an instant access icon to the AgentNow! application.

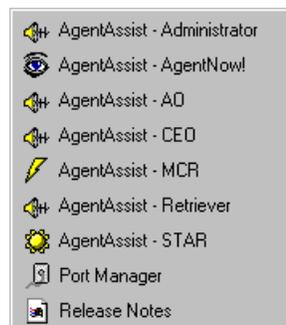
### **Log in to Spontaneous Telephony Agent Recording**

---

Use the procedure below to log in to the AgentNow! application:

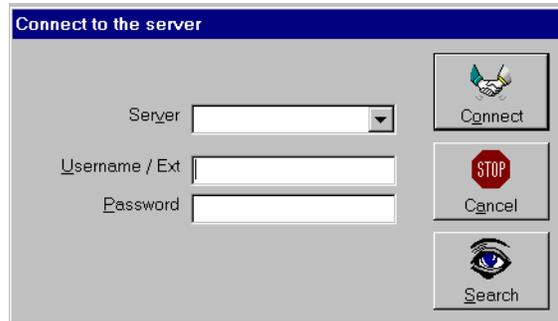
1. For Windows 95/98 or Windows NT, select Programs from the Start menu.  
The system displays the list of Program folders.
2. Select CenterPoint Solutions.
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist-AgentNow!.

The system displays the initial supervisor login window.



This window is similar to the login window described in “Client PC Administration” in Chapter 3, “Agent Assist Administration”.

5. In the Server field, select or type a Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network and are currently running Agent Assist Server Software

Click on the Search button to search the network for valid Intuity CONVERSANT systems.

6. In the Username/Ext field, type your login name or extension identifier.
7. In the Password field, type your supervisor password.
8. Click on the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The information from the Intuity CONVERSANT system is downloaded to the client PC for the application session.

Once the supervisor is logged into the system, the system displays the AgentNow! window.



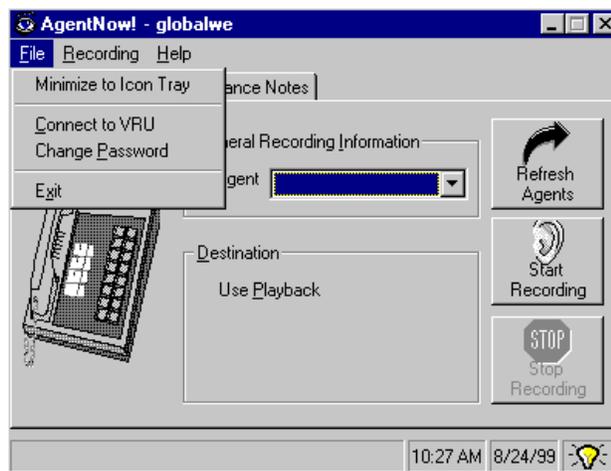
## Instant Access to the AgentNow! Application

---

During normal PC use, the AgentNow! application is not active. However, when desired, the agent will want quick access to the application. The Agent Assist software provides the capability of placing the AgentNow! icon in the icon tray at the bottom of the Windows screen.

Use the procedure below to create a “quick access” icon for AgentNow!:

1. Start at the AgentNow! window and from the File menu, select Minimize to Icon Tray.



The system minimizes the AgentNow! window on the desktop and provides and instant access icon (the eye) from the icon tray at the bottom of the Windows screen.



Click this icon at any time to initiate a AgentNow! recording session.

## Using AgentNow!

---

Use the procedure below to use the AgentNow! application:

1. Click on the AgentNow! instant access icon (the eye) from the icon tray at the bottom of the Windows screen.

The system displays the AgentNow! window.



2. Click on the Recording Details tab to activate that portion of the window.
3. Select the agent to record using the pull-down list of agents in the Agent field.

**⇒ NOTE:**

Supervisors may only record agents assigned to them in the administration section of the Agent Assist features. See “Agent Administration” and “Supervisor Administration” in Chapter 3, “Agent Assist Administration” for more information about administering agents and supervisors.

4. Press the Start Recording button to begin an AgentNow! session.

The AgentNow! session is active on the Intuity CONVERSANT system and the client PC.

The status bar at the bottom of the window displays the recording ID of the call that is currently recording.



5. Press the Stop Recording button when the conversation is over, or when you wish to stop recording.



### Enter Observation Notes

The AgentNow! application provides a window for the supervisor to enter observation notes either during or after the conversation.

These textual notes are stored in the Intuity CONVERSANT system and are associated with the recording.

Use the procedure below to enter text notes with an AgentNow! recording:

1. From the AgentNow! window, click on the Observance Notes tab.
2. Type your notes in the text field.



3. When you have finished entering text, from the Recording menu, select Update Notes or click on the Update icon.

**⇒ NOTE:**

Any text entered is displayed with the recording information in the Notes field of the Recording Retriever window.

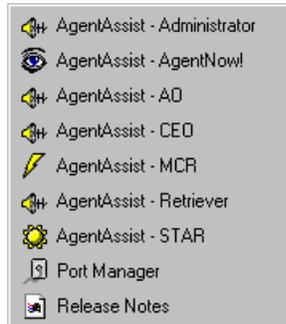
## Recording Retrieval

By design, the AgentNow! application does not allow retrieval of recordings from the client application. It is intended that supervisors gain access to these recordings via the Agent Assist Recording Retriever application. See Chapter 3, "Retrieve Recordings" on page 3-49.

Use the procedure below to use the Recording Retriever:

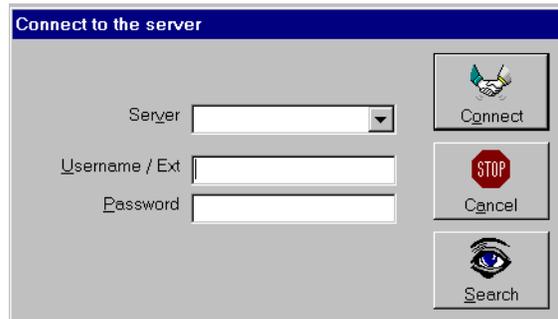
1. For Windows 95/98 or Windows NT, select Programs from the Start menu.  
The system displays the list of Program folders.
2. Select CenterPoint Solutions.
3. Select Agent Assist.

The system displays the list of applications.



4. Select AgentAssist-Retriever.

The system displays the initial supervisor login window.



5. In the Server field, select or type an Intuity CONVERSANT system from the drop-down menu. The systems listed are those connected through the local area network and are currently running Agent Assist Server Software.

Click on the Search button to search the network for valid Intuity CONVERSANT systems.

6. In the Username/Ext field, type the login name or extension identifier of the supervisor.

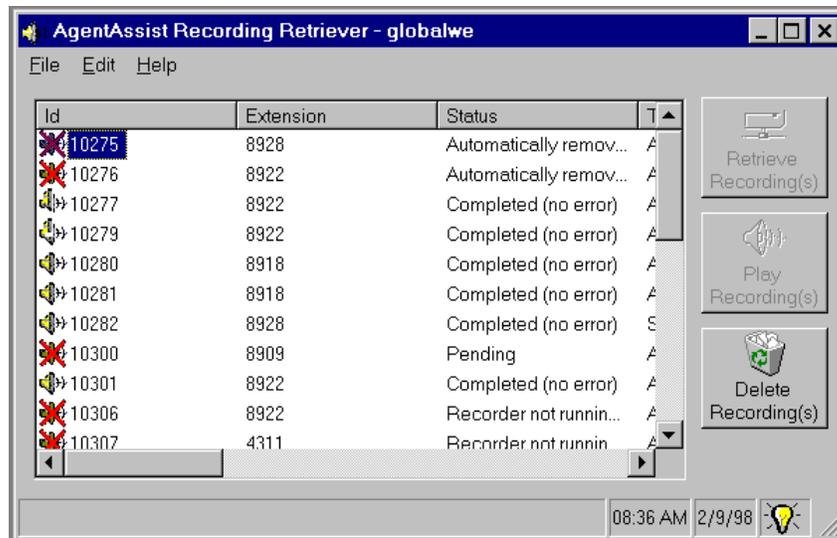
7. In the Password field, type the supervisor password.

8. Click on the Connect button to connect the client PC to the selected Intuity CONVERSANT system.

The information from the Intuity CONVERSANT system is downloaded to the client PC for the application session.



Once the supervisor is logged into the system, the system displays the Recording Retriever window.

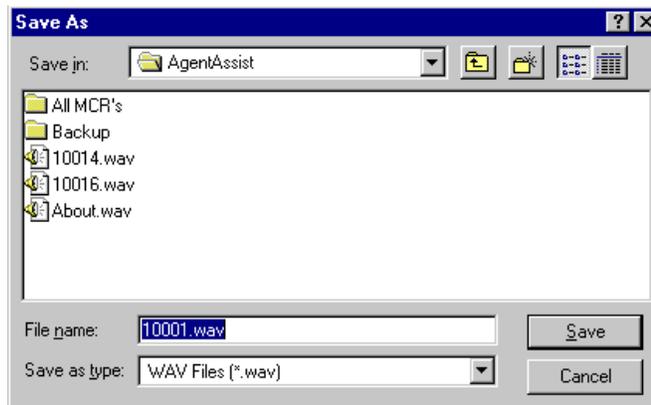


9. Highlight the recording you wish to retrieve from the list in the window.
10. Click on the Retrieve Recording button.



The system retrieves the CELP or ADPCM sound file from the Intuity CONVERSANT server.

The system displays the Save As window:



11. Select the location (folder or floppy diskette) to save the retrieved recording(s).

12. Choose from the following options:
  - If you have a CELP voice file player, select Edit|Use CELP Player to play CELP voice files to use the CELP player.
  - If you do *not* have a CELP voice file player the files automatically convert and save as a .wav file.
13. Click Save.



**NOTE:**

The Retrieve Recording(s) option is designed to retrieve only.

## Playback Recordings

---

There are two methods by which to playback recordings:

- Through the client PC (Multimedia player required)
- Through the Intuity CONVERSANT server via touch-tone a telephone

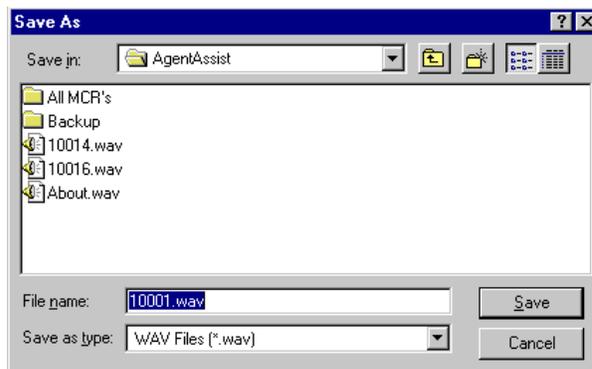
### Playback Recordings through the Client PC

Use this procedure to listen to completed recordings from the client PC:

1. Start at the Recordings tab of the Administrator window and highlight the recording(s) you wish to playback. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.
2. Click on the Play Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the Intuity CONVERSANT server.

The system displays the Save As window:



3. Select the location (folder or floppy diskette) to save the retrieved recording(s) for playback.

4. Choose from the following options:

- If you selected Edit|Use CELP Player to play CELP voice files, the CELP voice file player opens.
- If you saved the file as a .wav file, your default Windows voice player opens.

**⇒ NOTE:**

CELP files are stored on the CONVERSANT system with an .lvp extension and use less hard drive space than .wav files.

The default multimedia recorder window is displayed and indicates at the top of the window which .wav file is currently present for playback.



5. Click the  button to listen to the recording.
6. Close the multimedia window or click on a .wav file from the Task bar to continue with playback(s).

**⇒ NOTE:**

If multiple recordings are retrieved for playback and you wish to listen to a specific .wav file, you may click on the specific .wav file from the Task Bar for playback.

### Playback Recordings through the Server

Recorded messages can also be played using the telephone to access the server directly by entering the recording ID number or the extension on which the recording was made.

Use the procedure below to listen to completed recordings from a telephone:

1. Dial the telephone number corresponding to the channel assigned to Used for Playback on the Intuity CONVERSANT system. The Used for Playback Service must be assigned to the selected channel using the Port Manager. See Chapter 3, "Assign Ports for Telephone Playback" for more information.
2. The supervisor will be prompted for their extension followed by the # key and password followed by the # key. Once connected to the Agent Assist Recording Player, the supervisor has the option to hear a specific recording or a list of recording IDs for a given extension.

To listen to a specific recording:

- Enter the recording ID followed by the # key.

You hear the ID number, extension, date, and length of the recording and the actual recording.

To listen to a list of recordings for a given extension:

- Enter an agent extension number followed by the \* key.

You hear the ID number, extension, date, and length of the recording.

 **NOTE:**

The supervisor password is identical to that assigned in the client application. As a result of the capability of accessing via a touch-tone phone, this password must be numeric.

### Refresh Recordings

To refresh recordings, from Recording menu, select Refresh. You may also press **F5** to refresh recordings. If any additional recordings have been scheduled or added, they now appear in the window.

### Archive Recordings

Files may be saved for later usage or editing. This is accomplished by storing them as a standard .wav file in a directory (or floppy diskette) located somewhere other than on the Intuity CONVERSANT system.

 **CAUTION:**

*You should periodically remove recordings from the Intuity CONVERSANT system to save space on the system disk.*

## Delete Recordings

---

Use the procedure below to delete recordings:

1. Start at the Recordings tab of the Administrator window and select recording(s) from the list. To select multiple recordings, hold down the Control key while selecting recordings.
2. Click on the Delete Recording button.



Both the recording and any associated notes are permanently removed from the Intuity CONVERSANT system.

**⚠ WARNING:**

*Once removed from the Intuity CONVERSANT system, the record cannot be retrieved unless previously stored on a floppy diskette or converted to a .wav file.*



### **Overview**

---

This chapter provides some basic procedures for troubleshooting the Agent Assist system software.

### **Purpose**

---

The purpose of this chapter is to provide troubleshooting resolution procedures.

### **Troubleshooting Agent Assist Software**

---

This chapter helps remedy some problems that may occur while you are using the Agent Assist system software. First, follow the troubleshooting steps for a list of problems and solutions. Then, if you experience problems, call the following number:

Technical Service Center

**1-800-242-2121**

### **Messages and Alarms**

---

Certain situations and chain-of-events may cause Agent Assist and the Intuity CONVERSANT system to generate one or more of the messages listed in this section. We refer to all of these messages as “alarms,” but some are only informational and therefore do not require immediate action.

## Escalation Strategy

---

When you are unable to resolve the trouble you have experienced, contact your technical support organization. You will need to provide the technical support engineer with the general information concerning the trouble as well as information such as login IDs, passwords, and modem numbers.

## Issues

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### INTUITY CONVERSANT Machine Network Name

---

The CONVERSANT host name must be included with your license application. To determine the Intuity CONVERSANT machine name on the network:

1. Login to the CONVERSANT as **root**.
2. Enter **uname -n** and write down the result.

Write CONVERSANT Machine Name here:

\_\_\_\_\_

You will need this machine name to be able to get a license for your CallBack Manager application.

3. Enter **grep XXX /etc/host** where **XXX** is the CONVERSANT name returned by the **uname** command. If no match is returned, the CONVERSANT name must be added to the hosts file.
4. Exit.

### Voice Recording Problems

---

To resolve agent recording problems:

1. Verify the voice system is running.
  - a. Log on to the CentreVu® Messenger/ CONVERSANT system as **root**.
  - b. At the prompt enter **start\_vs**
2. Verify the plrecord is running.
  - a. Log on to the INTUITY CONVERSANT system as **root**.
  - b. At the UNIX prompt enter **ps -ef | pg**  
Look for **/usr/add-on/centerpoint/agentassist/bin/plrecord**
  - c. If not found, enter **cd /usr/add-on/centerpoint/agentassist/bin**

- d. At the prompt enter **plrecstart**.
- e. Verify the recording is running by entering the **ps-ef | pg** command again.
3. Verify the recording status has been assigned to the channels.
  - a. From the client PC, open the Agent Assist Port Manger and use it to check the channels assignments.
4. Verify the Switch Feature Access Code is the same as the DEFINITY switch FAC.
  - a. From the client PC, open the Agent Assist Port Manager.
  - b. Verify the Switch FAC is the same as the DEFINITY switch
5. If problems occur with Customer Experience Observing, verify the VDN selected to record is a valid VDN on the DEFINITY switch:
  - a. Log onto the DEFINITY switch.
  - b. At the prompt enter **list vdn**  
This lists the valid VDNs on the switch. Look for the VDN.
6. If agents are not being recorded:
  - a. Verify agent information was entered correctly in the Agent Assist Administrator.
  - b. Verify the agent extensions have been defined in the switch.

### Recordings Do Not Automatically Delete

If your agent recordings do not automatically get removed from the server, follow these steps.

1. Log on to the Intuity CONVERSANT as **root**.
2. At the UNIX prompt, enter **ps -ef | grep pl**
3. Write down the process ID for plserver (number in second column).
4. Enter **kill <process ID number>** (from step 3).
5. Enter **cd /usr/add-on/centerpoint/bin**
6. Enter **plsvrstart**
7. Verify server is running by entering **ps -ef|grep pl**

Look for the process ID for plserver.

## **Recordings Do Not Record When Expected**

If scheduled recordings do not begin and end at the times you expect, you may need to synchronize the time between the CONVERSANT and the client.

To check the time on the CONVERSANT:

1. Login to the CONVERSANT.
2. Enter "Date"

The system displays the time and date.

## **Enhanced Basic Speech Problems**

To verify that Enhanced Basic Speech is installed:

1. Login to the CONVERSANT as **root**
2. Enter **pkginfo | grep ebsUS**

If the package is installed, the following line will appear in the result set:

```
intuity ebsUS Enhanced Basic Speech - US_English -  
Female
```

If you do not receive this line, contact the Lucent Account Executive to purchase the package.

## **Invalid User Name or Password**

To validate a user name or password:

1. Verify the user name has been entered in the Agent Assist Administrator Agent tab.
2. Verify the password.
3. Reset the user password in Agent Assist Administrator, Detail Options.



**NOTE:**

This can only be done by the Administrator.

### Error Message 32004 Unable to Locate gtiserv

To resolve problems associated with error 32004, use the README.TXT file supplied with the software.

Verify the gtiserv, gticInt, and gtisrvr entries are in the following directory file:

- For Windows 95/98, edit the **lwindows\services** file

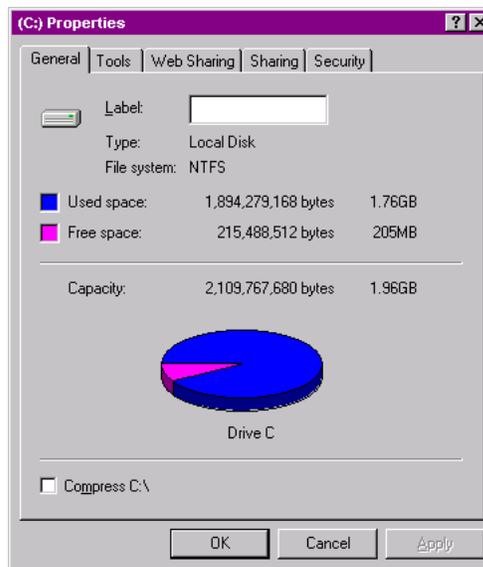
OR

- For Windows NT, edit the **lwinnt\system32\driver\etc\services** file

### Hard Drive Space Problems

To determine the amount of available space on a hard drive:

1. Run Windows Explorer (the file manager not the Internet browser).
2. Locate the icon associated with the drive in question, generally drive C.



3. Right click on the drive icon.
4. Choose Properties from the pop-up menu.
5. Note the amount of free space shown in megabytes. In the previous example, drive C only has 28.4MB free, indicating that drive space is critically low.

### Available Space Problems on the Disk Partition

1. Login to the CONVERSANT as **root**
2. Enter **df -k**
3. Scan through the first column of the results for the voice1 file system.

```
filesystemkbytesusedavailcapacitymounted on
/dev/root7321606815075065393%/
/proc0 0 0 0% /proc
/dev/fd00 0 0% /dev/fd
/dev/vol/standvol1536043361102428%/stand
/dev/vol/mtce2048066541382632%/mtce
/dev/vol/vs2048009156111323945%/vs
/dev/vol/tmp204801706187748%/tmp
/dev/vol/voice161337634247227090456%/voice1
/dev/vol/oracle7134000003030709693076%/oracle
/dev/vol/home2500001541489585262%/home
```

The percentage listed in the capacity column indicates the amount of space used on the partition. The avail column displays the amount of space available. In the sample results shown above, the partition "/dev/voice1" is 56% full with 270MB free.

### CONVERSANT Login Problems

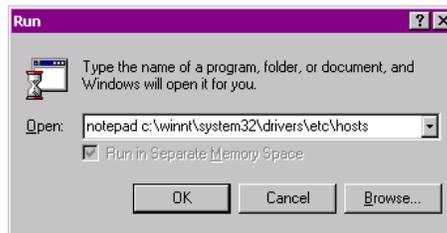
If you cannot login to the CONVERSANT via Port Manager or Agent Assist, you may want to try pinging the server. If you can ping by IP, you may need to update the hosts file, then try pinging again. If you still cannot ping, check with your system administrator to see that the CONVERSANT is properly configured on the network.

To ping the server:

1. From the Start menu, select Run.
2. Enter “ping -t XXX” where XXX is the server name or the IP address. In the example below, an attempt is made to ping the server named “globalwe.”

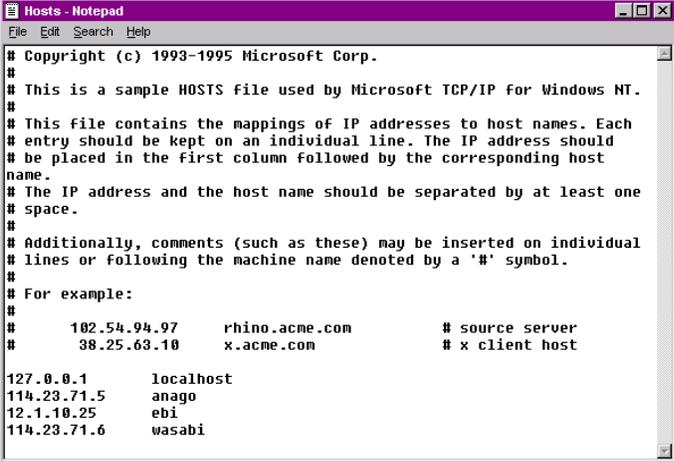


3. Wait for about five seconds and then press Ctrl-C to stop the ping.
4. Choose from the following options:
  - If the ping is successful, you receive a reply from the CONVERSANT similar to the following:  
**Reply from 221.105.23.114: bytes=32 time<10ms TTL=255**
  - If the ping is unsuccessful, you receive the following message:  
**Request timed out.**  
Contact your network administrator.
5. If you cannot login to the CONVERSANT by host name, but you can ping by IP:
  - a. From the Start menu, select Run.
  - b. Open the hosts file using Notepad. The pathname shown below is for a Windows NT client. For a Windows 95 client, the hosts file can be found in “c:\windows”



- c. Add the server to the hosts file. In the example shown below, the server wasabi with an IP address of 114.23.71.6 has been added.

d. Save the file.



```
Hosts - Notepad
File Edit Search Help
# Copyright (c) 1993-1995 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows NT.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host
# name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#       102.54.94.97   rhino.acme.com   # source server
#       38.25.63.10   x.acme.com     # x client host
127.0.0.1       localhost
114.23.71.5     anago
12.1.10.25     ebi
114.23.71.6     wasabi
```

---

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