

Lucent Technologies
Bell Labs Innovations



CentreVu[®] Messenger
Agent Assist User Guide

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Comcode 108118639
Issue 1
April 1998

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Low-Voltage Directive 73/23/EEC



The "CE" mark affixed to the equipment means that it conforms to the above directives.

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Acknowledgment

This document was prepared by Product Publications, Lucent Technologies, Columbus, OH.

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About This Document

Purpose

This document, *CentreVu® Messenger Agent Assist Administration*, 585-313-704, provides administrative details about the functions of the Agent Assist System Software Version 2.5 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

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

To Locate Specific Topics

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

Conventions Used in This Document

This section describes the conventions used in this document.

Terminology

- 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
Press **ENTER**.
- 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 **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 CentreVu® Messenger Main Menu and select

```
> Customer/Services Administration
> Alarm Management
```

In this example, you would access the CentreVu® Messenger 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.

Safety and Security Alert Labels

This document uses the following symbols to call your attention to potential problems that could cause personal injury, damage to equipment, loss of data, service interruptions, or breaches of toll fraud security:



CAUTION:

Indicates the presence of a hazard that if not avoided can or will cause minor personal injury or property damage, including loss of data.



CAUTION:

Indicates the presence of a toll fraud security hazard. Toll fraud is the unauthorized use of a telecommunications system by an unauthorized party.



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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You may also fax your comments to the attention of the Lucent Technologies CentreVu® Messenger writing team at (303) 538-1741.

Please mention the name and order number of this document, *CentreVu® Messenger System Agent Assist Administration*, 585-313-704.

Overview

This chapter provides an overview of the Agent Assist system software for the CentreVu® Messenger 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 complete or partial conversations and other audio sessions using the CentreVu® Messenger 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 CentreVu® Messenger 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 CentreVu® Messenger 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", 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 CentreVu® Messenger system. When one of the on-demand applications is launched, such as S.T.A.R., the CentreVu® Messenger 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 CentreVu® Messenger system. Many of the administrative functions are accomplished through the Port Manager and the Administrator applications.
- **Recordings** — The CentreVu® Messenger 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 CentreVu® Messenger 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 CentreVu® Messenger system for later retrieval. Using the Agent Assist Recording Retriever application, you can:
 - Retrieve and play the recording on the PC
 - Call the CentreVu® Messenger system and listen to the recording
 - Archive the recording from the CentreVu® Messenger 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 1-1).

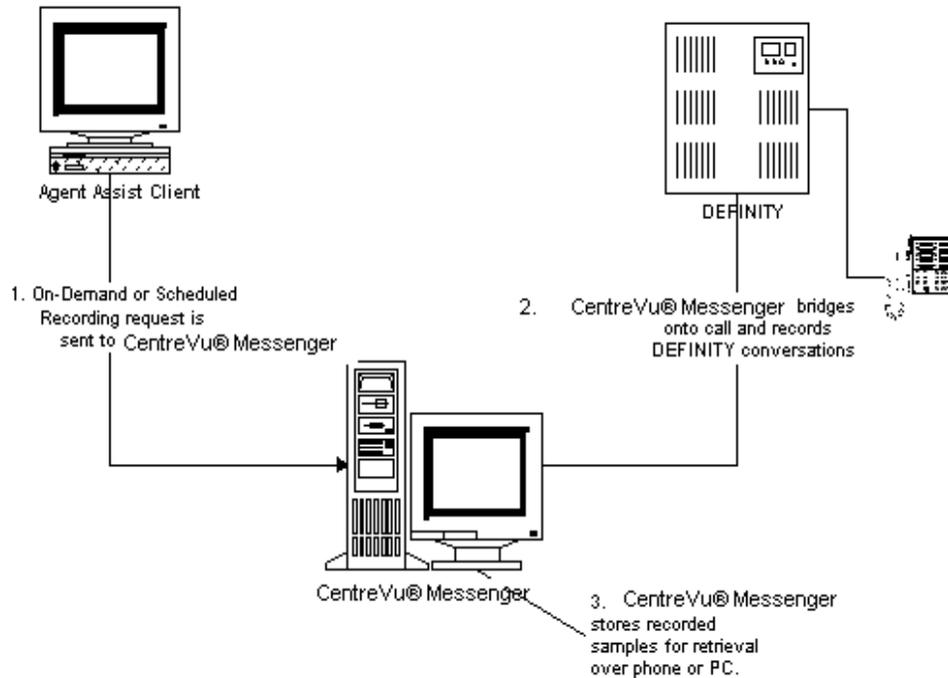


Figure 1-1. Client-Server Architecture

Network Architecture

The Agent Assist software uses a local area network configuration, either Token Ring or Ethernet running TCP/IP, to communicate with the CentreVu® Messenger system. Figure 1-2 depicts a typical network configuration required by the Agent Assist software.

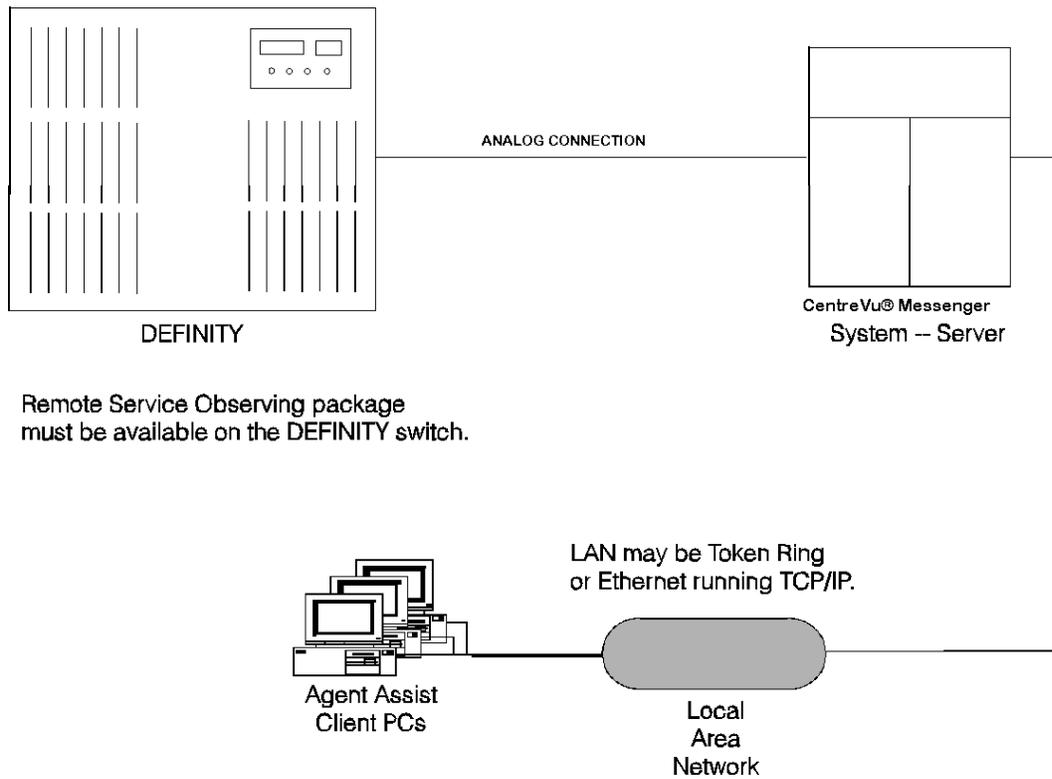


Figure 1-2. Agent Assist Network

Hardware and Software Requirements

The section describes the basic hardware and software requirements for both the CentreVu® Messenger system server and the Windows client PC.

Server Hardware and Software Requirements

The following is required to install the CentreVu® Messenger Agent Assist System software:

- Lucent Technologies platform; MAP/5P, or MAP/40P
- CentreVu® Messenger System
- Analog telephone network connection
- Local area network connection, Ethernet running TCP/IP

Client PC Hardware and Software Requirements

- PC running Windows 95 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.

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 CentreVu® Messenger System (server). The other component resides on a desktop personal computer (client) running Microsoft Windows 95 or Windows NT 4.0 operating system.

Server Software Installation

Use the procedure below to install the Agent Assist server software on the CentreVu® Messenger system:

1. At the Welcome to USL UNIX System V Release 4.2 Version 1 Console Login:, enter **root**

The system prompts you for a password.

2. Enter your root password.

The system displays the system prompt #.

3. Enter **pkgadd**

System response:

```
Please indicate the installation medium you intend to
use. Strike 'C' to install from CARTRIDGE TAPE or 'F' to
install from FLOPPY DISKETTE.
Strike ESC to stop.
```

4. Press **[F]**.

System response:

```
Insert the floppy disk.
```

```
Strike ENTER when ready
or DEL to cancel.
```

5. Insert the diskette labeled "Agent Assist Server, Disk 1 of 1" into the floppy disk drive.



NOTE:

The first disk is labeled Agent Assist Server. The other disks are labeled Agent Assist Windows Client.

6. Press **[ENTER]**.

System response:

```
Installation in progress -- do not remove the floppy
diskette.
```

When the system has finished installing the software, you receive the system response:

```
Installation complete.
```

Once the Agent Assist system software has been successfully installed on the server, you may install the applications on any client PC networked with the target server.

Local Area Network Connectivity

TCP/IP connectivity must exist between the clients and the CONVERSANT/CentreVu® Messenger system to administer and use the Agent Assist applications.

To find out the CONVERSANT/CentreVu® Messenger machine's network name, used in conjunction with the IP address:

1. Login to the CONVERSANT/CentreVu® Messenger as root.
2. At the UNIX prompt enter **sysadm**
3. Then select system-setup, nodename, then display.

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 or Windows NT 4.0 operating systems.

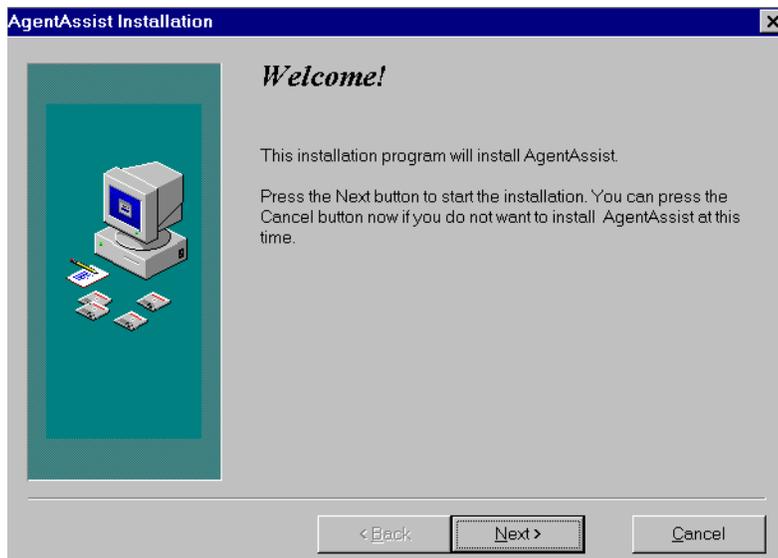
Use the procedure below to install the Agent Assist System software on the client PC:

1. Insert the diskette labeled "Agent Assist Windows Client, Disk 1 of 2" into floppy disk drive of the PC.
2. For Windows 95 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 Installation Notes screen. You may also access this information in the README.TXT file installed during this procedure.

⇒ NOTE:

Please read the Installation Notes carefully. This file contains late-breaking information that wasn't available when the manuals were printed. This file also contains installation details for manually configuring the SERVICES file for Windows 95 and Windows NT 4.0.

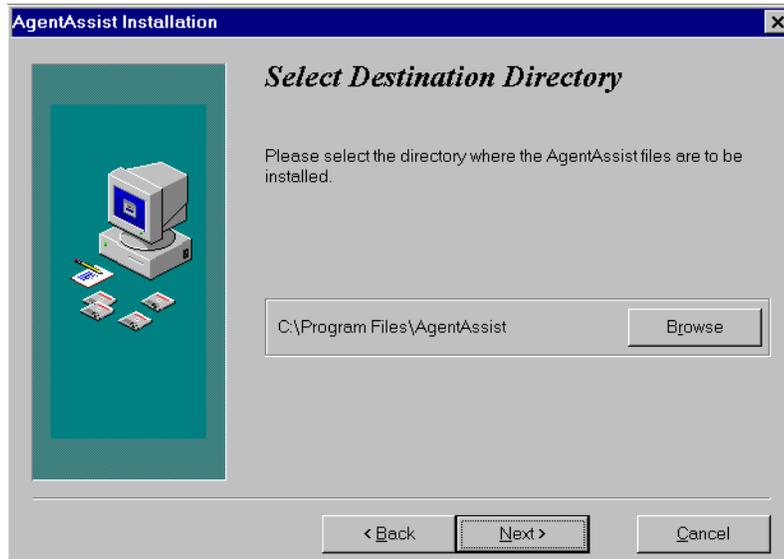
6. Click the Next button to continue.

The system displays the Registration screen.



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

The system displays the Select Destination Directory screen.

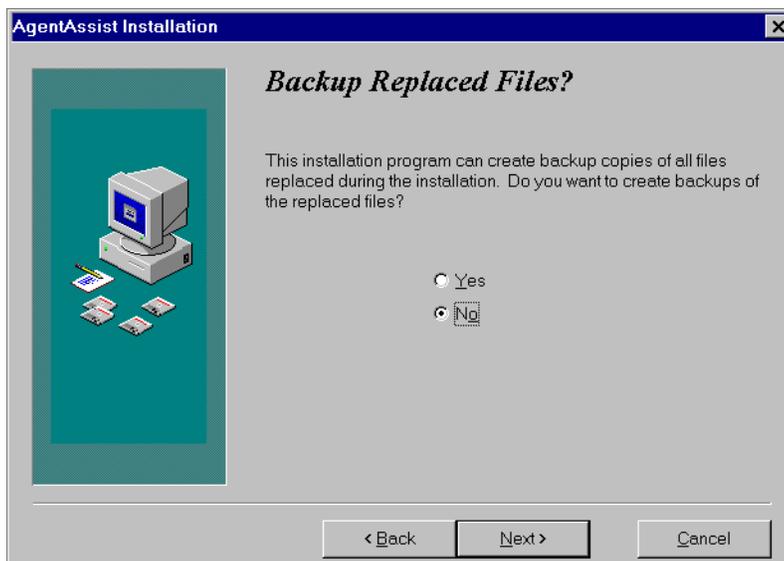


All applications must be stored in the same directory. The **c:\Program Files** directory is used as the default.

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

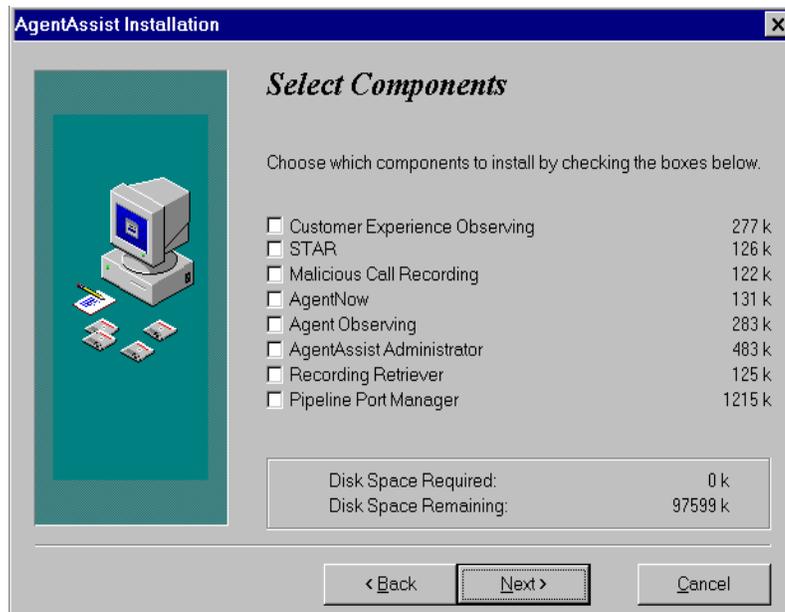
To select a new directory, either enter a directory in the field or click the Browse button to select a different directory. Click the Next button to continue.

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.



11. If you would like to backup your older files, select yes.
12. 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.



You are presented with eight options:

- one selection for each application
- PC Administrator
- Recording Retriever
- CentreVu® Messenger Administration

⇒ 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.

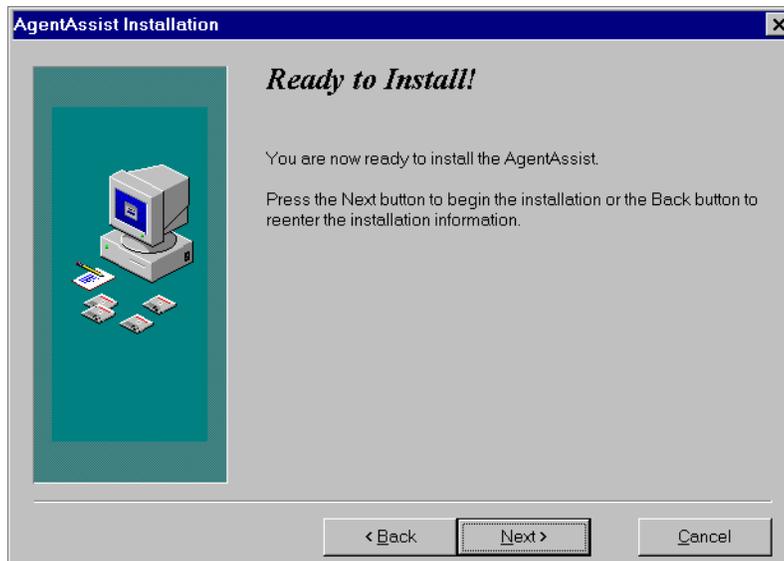
⇒ NOTE:

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.

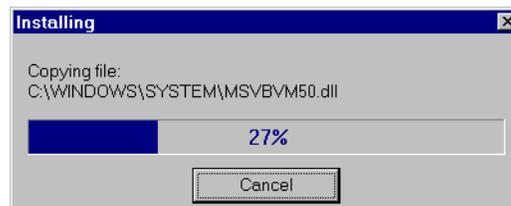
13. Select the Agent Assist applications to install.
14. Click the Next button to continue.

The system displays the Ready to Install screen.



15. Click the Next button to continue.

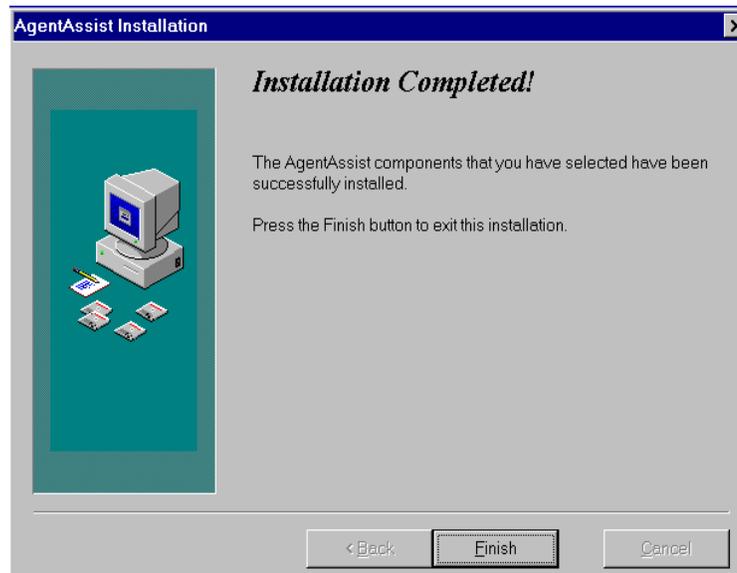
The system displays a progress bar, indicating that the Agent Assist applications are installing.



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

The installation program prompts you to insert the second disk.

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



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

The Agent Assist features are now added to your Start/Program 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 and Windows NT 4.0.

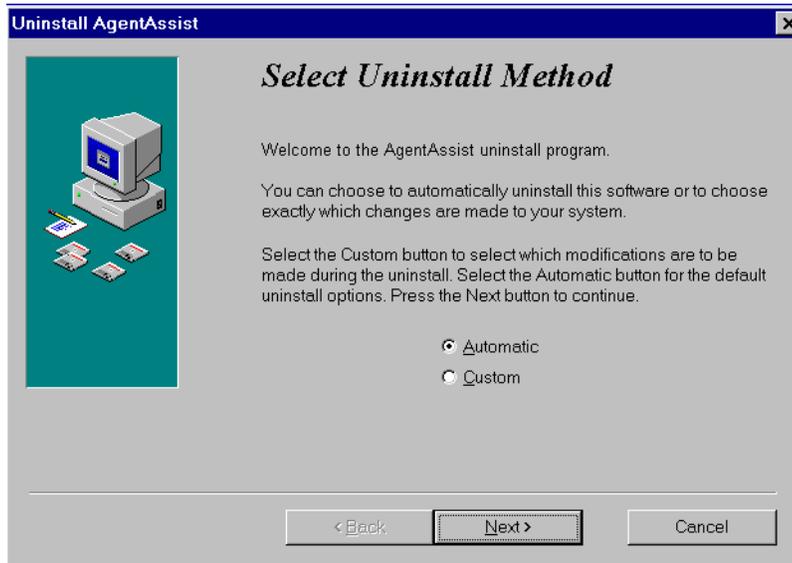
Uninstall the Agent Assist Software

Windows 95 and Windows NT

Use the procedure below to uninstall the Agent Assist System software:

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.



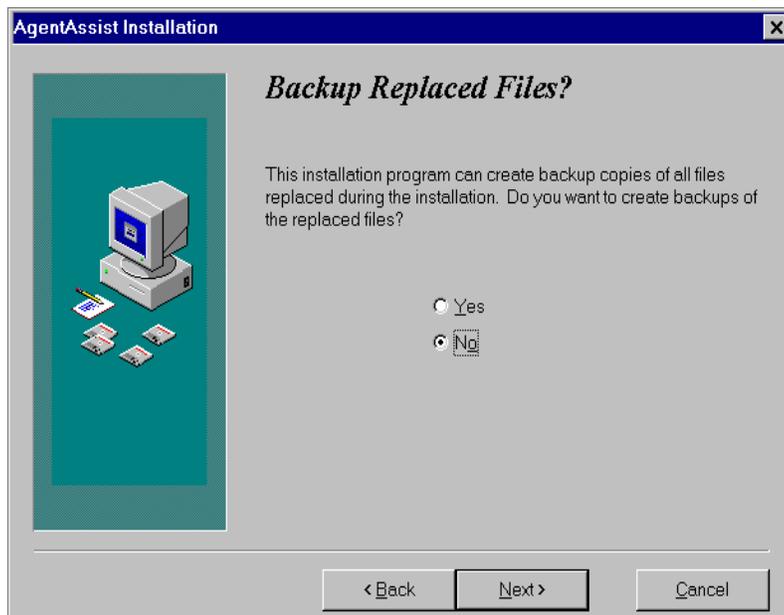
5. Select Automatic or Custom for the deletion process.

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

6. Click the Next button to continue.

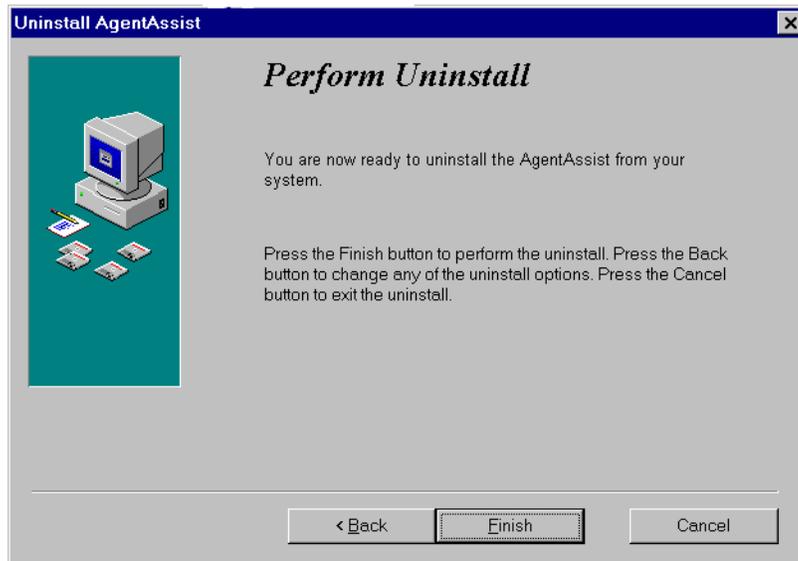
If you chose to perform a backup of older Agent Assist files during the installation of the Agent Assist software, the system displays the Perform Rollback screen.

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



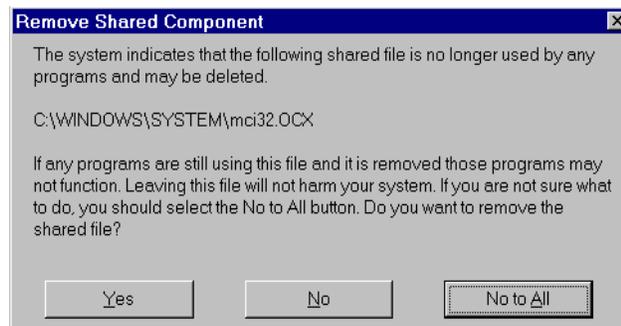
7. Select yes if you want the Agent Assist uninstall program to restore the older version of the Agent Assist files that were backed up during the install program.
8. Click the Next button to continue.

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.

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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT or CONVERSANT 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 CentreVu® Messenger/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:

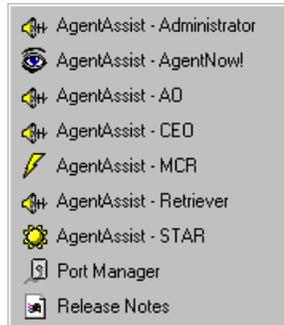
- Agent Assist applications do not take over or interrupt an application that is assigned to a CentreVu® Messenger/CONVERSANT system port. Only other Agent Assist recording requests may be terminated by a higher priority recording request.
- A scheduled recording request may be stopped to allow recording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

Port Manager

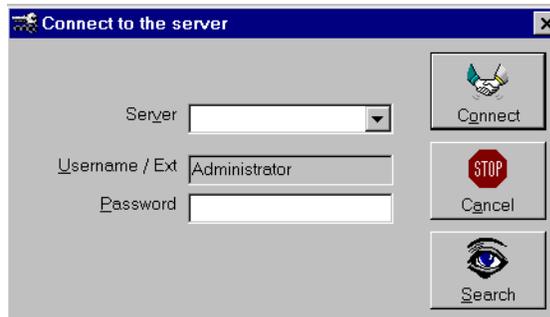
The Port Manager is provided for server and switch integration administration.

Use the procedure below to access the Port Manager:

1. Windows NT and Windows 95: From the Start menu, select Programs.
The system displays the list of Program folders.
2. Select Agent Assist.
The system displays the list of applications.



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 name. 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 CentreVu® Messenger/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 3-32.

6. Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The system displays the Port Manager window.



Server Settings

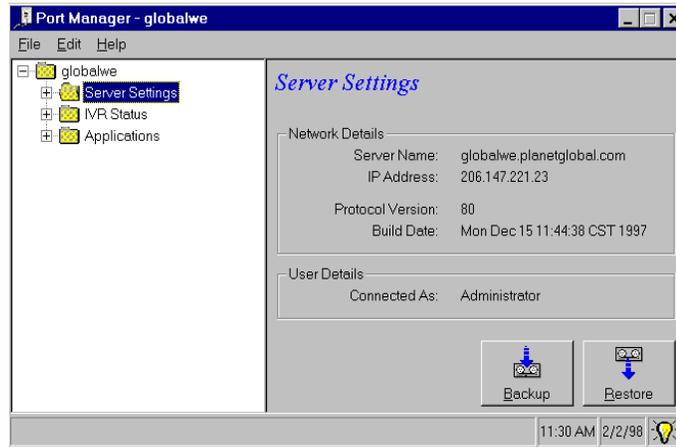
The Server Settings main folder provides an overview details screen, listing the current server name, IP address and protocol version and the user identity.

There are three sub-folders within the Server Settings folder, which control port assignments, dialing options and licensing information. They are used by all 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 CentreVu® Messenger/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 CentreVu® Messenger/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 CenterVu Messenger/CONVERSANT server.
2. Click on the Restore button to restore the data from the tape.



⇒ NOTE:

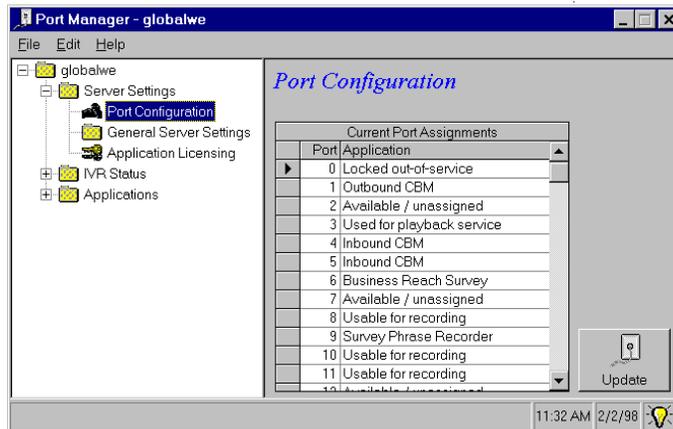
If you restore from a backup with data from the previous day, all data entered for the current day will be lost.

Port Configuration

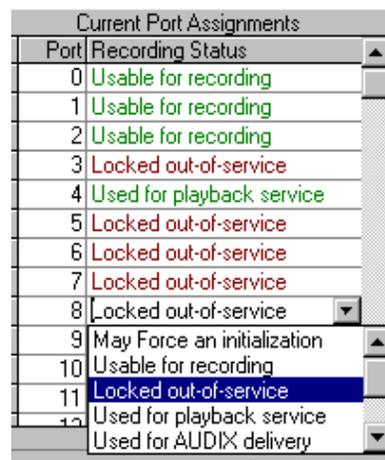
This dialog box assigns a use for each available port on your system.

Use the procedure below to set port assignments:

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



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



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

The following list describes each port status:

- May Force an initialization — forces an application
- Usable for recording — used for recording
- Locked out-of-service — not available

- Used for playback service — used to dial into the CentreVu® Messenger/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.

- Used for AUDIX delivery —
- Outbound CBM —
- Used by Conference Bridging —
- Inbound CBM —
- Record CBM Custom Greetings —
- Business Reach Survey —
- Survey Phrase Recorder —
- Out of Service/unavailable —
- Available/unassigned —

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 CentreVu® Messenger/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 3-30.

⚠ 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 CentreVu® Messenger/CONVERSANT System user documentation for more information about port assignments on the CentreVu® Messenger/CONVERSANT system.

Save Port Assignments

Once all port assignments are complete, the information must be sent to the CentreVu® Messenger/CONVERSANT system.



Click on the Update button to save the port assignments to the CentreVu® Messenger/CONVERSANT system as displayed in the Current Port Assignments window.

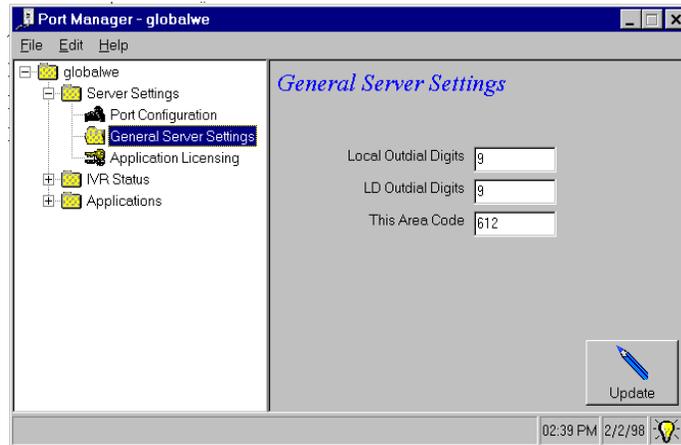
General Server Settings Administration

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

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.
7. Click on the Update button to save the settings.



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.

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**.

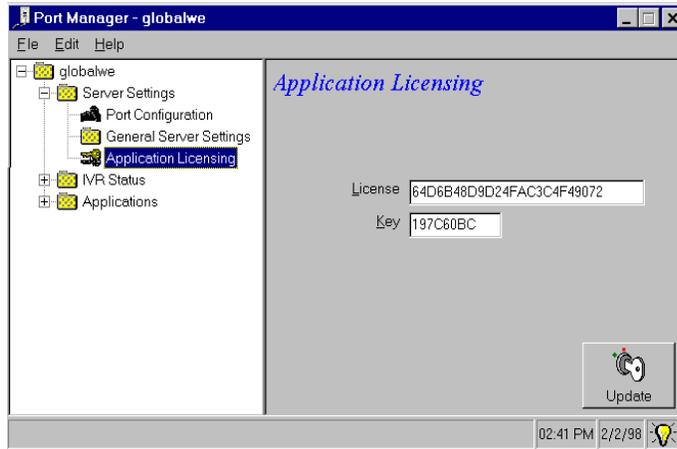
When purchasing this software, you should have received licensing information from your Lucent Technologies account representative and/or the Lucent professional services organization. If you do not have a license, contact Lucent at 1-800-242-2121. Have the following information available when you call:

- Agent Assist Order # _____
- Applications Purchased: 1) AO 2) MCR 3) CEO 4) STAR 5) AgentNow 6) Bundle
- CentreVu® Messenger/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 CentreVu® Messenger/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.



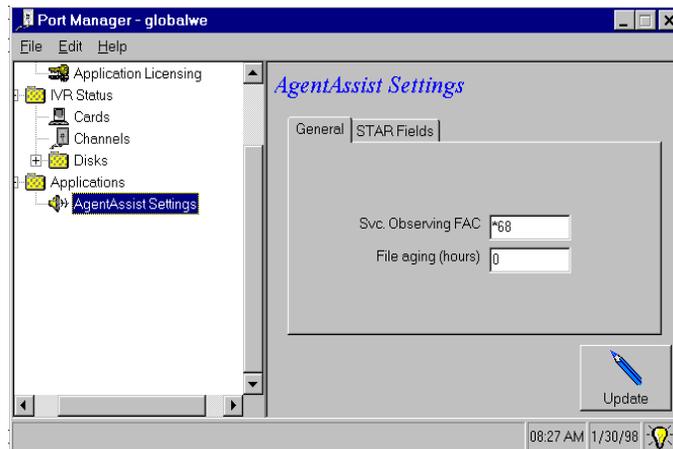
Agent Assist Settings Administration

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/ 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 3-34 for the procedure to assign the Remote Service Observing FAC on the DEFINITY switch.

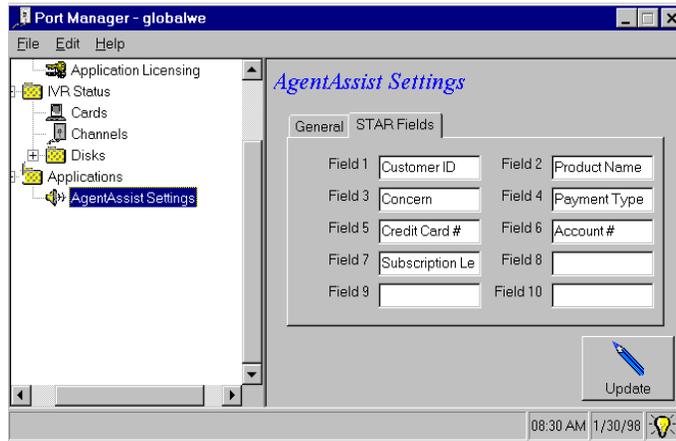
In the example above, the DEFINITY FAC for Remote Service Observing is set to *68. (This is set on the switch)

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 Chapter 7, page 7-7, “Entering Observance Notes”. Type your customized description into the field(s).



6. Click on the Update button to store the settings within the CentreVu® Messenger/CONVERSANT system.



IVR Status

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

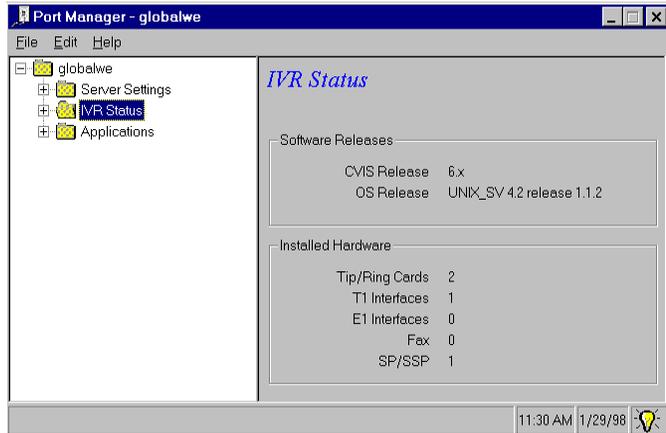
There are three main IVR Status sub-folders, which provide detailed information regard IVR cards, channels and disks.

➤ NOTE:

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

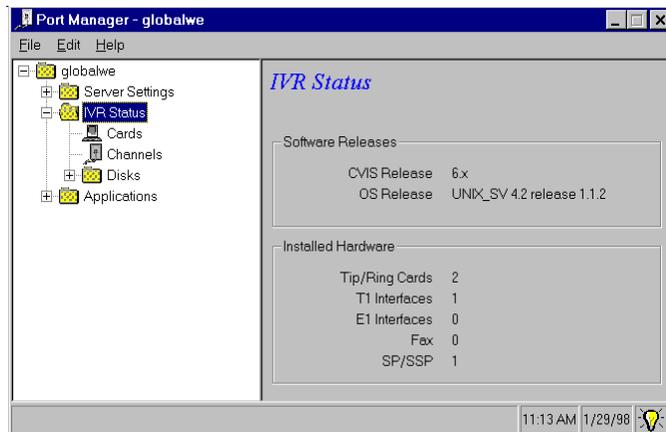
Use the procedure below to view IVR Status overview details:

1. Click IVR Status folder icon.
The system displays the IVR Status window.



2. Expand the IVR Status folder.

The system displays the status window with the current settings:



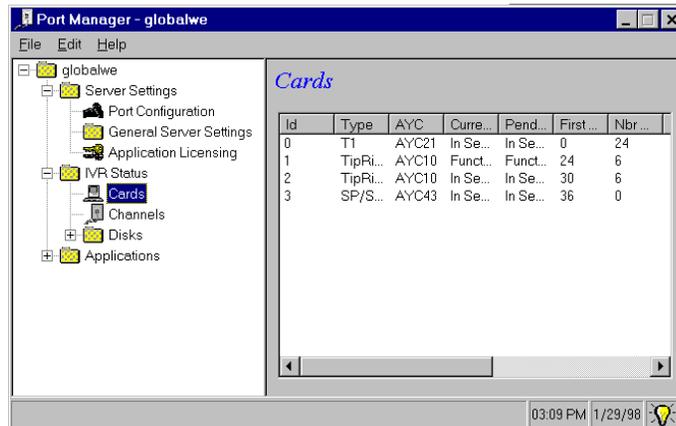
Cards

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

Use the procedure below to view card information:

1. Start at the IVR 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 IVR 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. 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	Pipe
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	

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 IVR application currently using this channel (PipelineRcd = Pipeline Recording)
- Called # — the number dialed to reach that application
- Calling # — the called Id# (ANI) — the number called *from* — (available only if you have called 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.

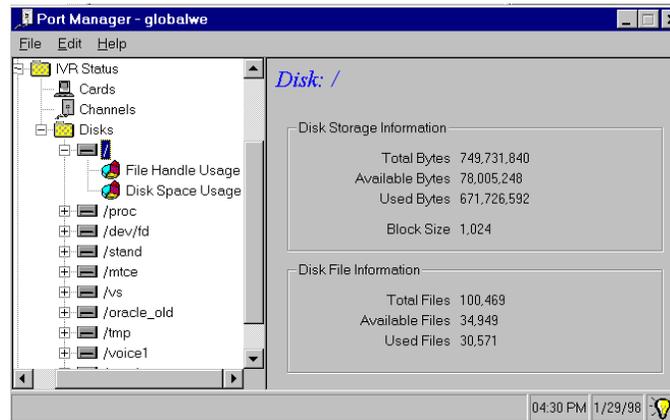
Disks

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.

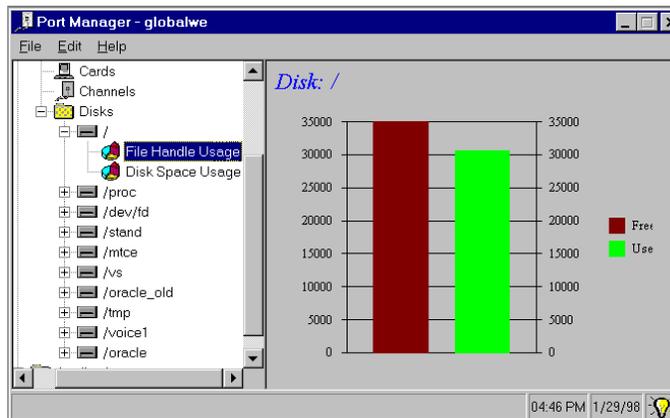
There are three windows available for each “disk” — an overview details window, and two windows showing pie charts that compare free and used portions of system disk space.

Use the procedure below to see the Disk overview information:

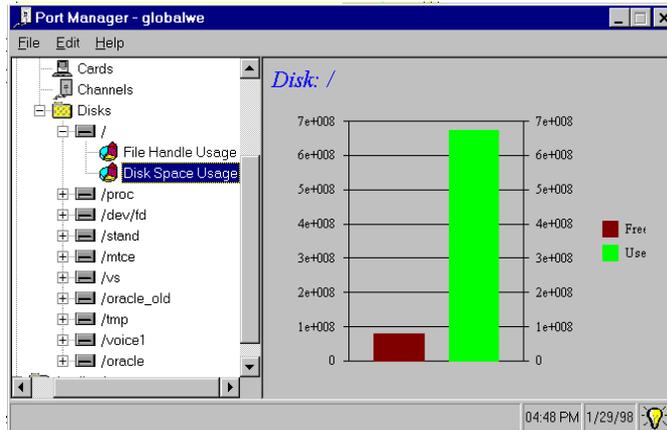
1. Start at the IVR Status window and click on the desired disk folder icon. The system displays the disk storage and disk file information window.



2. Click on the disk folder icon to view the pie 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.

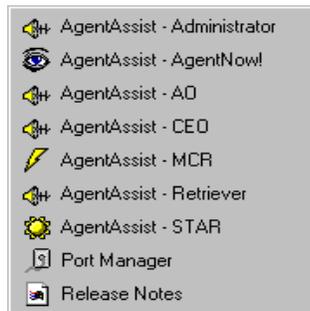


Client PC Administration

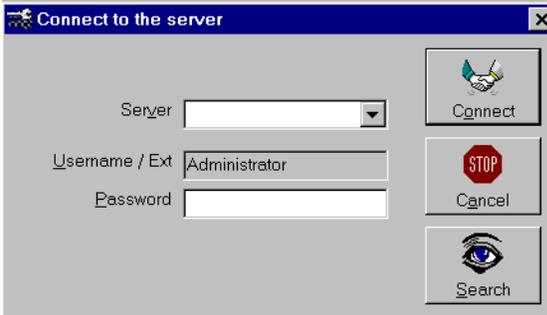
The client PC features are administered through the Agent Assist Administrator application.

Use the procedure below to access the Agent Assist Administrator:

1. Windows NT and Windows 95: From the Start menu, select Programs.
The system displays the list of Program folders.
2. Select Agent Assist.
The system displays the list of applications.



3. 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.

4. In the Server field, select or type a CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

The Username/Ext field is always set to "Administrator".

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 3-32.

6. Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The information from the CentreVu® Messenger/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:

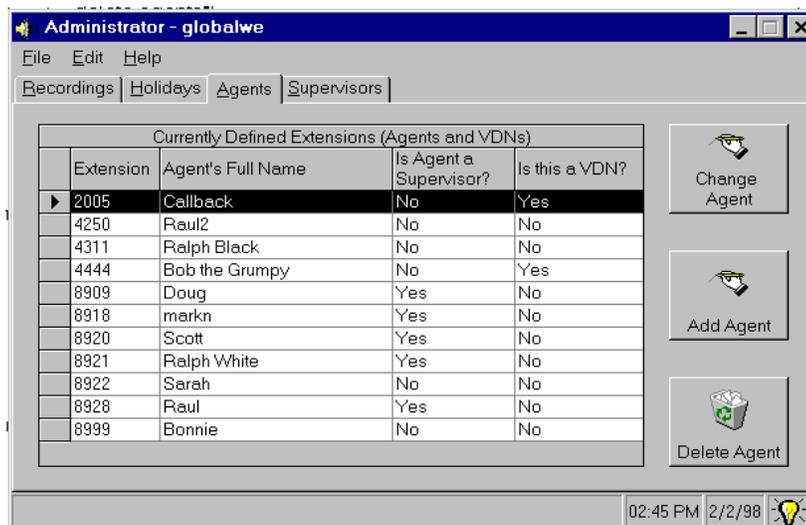
Only the administrator may change agent information.

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.

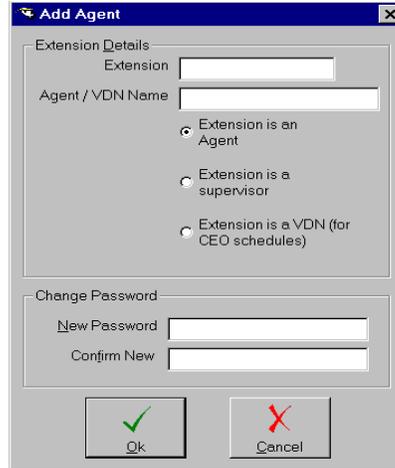


Add Agents

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.

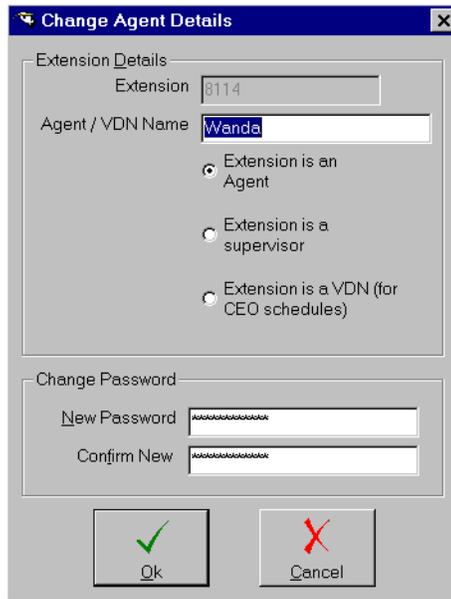
Change Agent Details

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.
4. To change the password, type the new password in the New Password field.
5. Type the new password again in the Confirm New field.

To help ensure security, asterisks (*) are displayed in both fields while the password is entered. All name and password information is case insensitive.

⇒ NOTE:

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

The default agent and supervisor password is “1234”.

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:

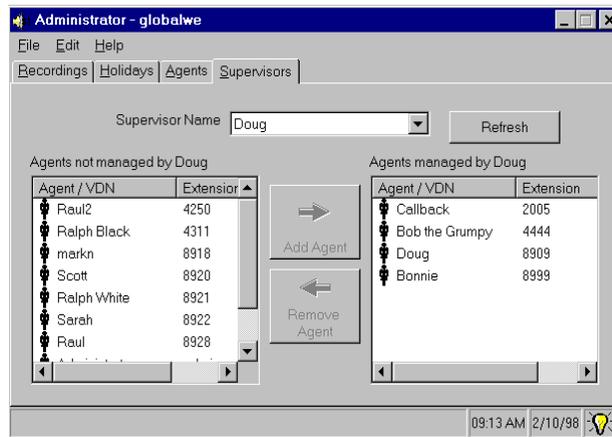
By default, everyone is initially added to the system as an "Agent". To assign an agent with supervisor status, use the "Add Agents" procedure above, and enter "Yes" in the *Is Agent a Supervisor?* field.

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 on the Supervisor Name bar to display a list of all currently assigned supervisors.

By default, the system displays the first available supervisor.

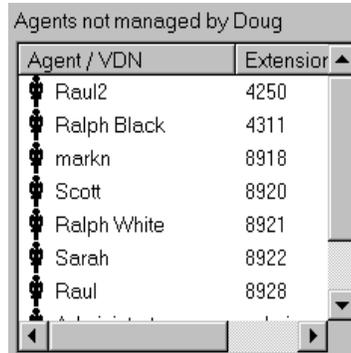


These are the names designated as supervisors in the Agents table.

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

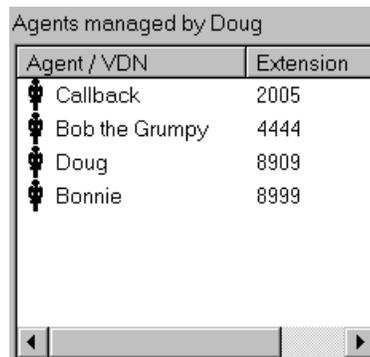
The two lists in the window show the names of agents both assigned and not assigned to the selected supervisor's pool.

The following list shows the agents not assigned to the supervisor Doug:



Agent / VDN	Extensior ▲
Raul2	4250
Ralph Black	4311
markn	8918
Scott	8920
Ralph White	8921
Sarah	8922
Raul	8928

The following list shows the agents assigned to the supervisor Doug:



Agent / VDN	Extension
Callback	2005
Bob the Grumpy	4444
Doug	8909
Bonnie	8999

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

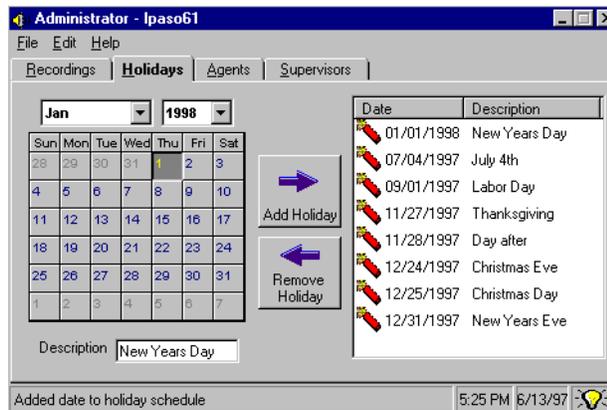
The Holiday tab allows the administrator to assign specific days when the call center is closed for service. During these days, the scheduled Agent Assist applications do not collect any recordings.

Add Holidays

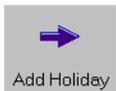
Use the procedure below to add holidays:

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

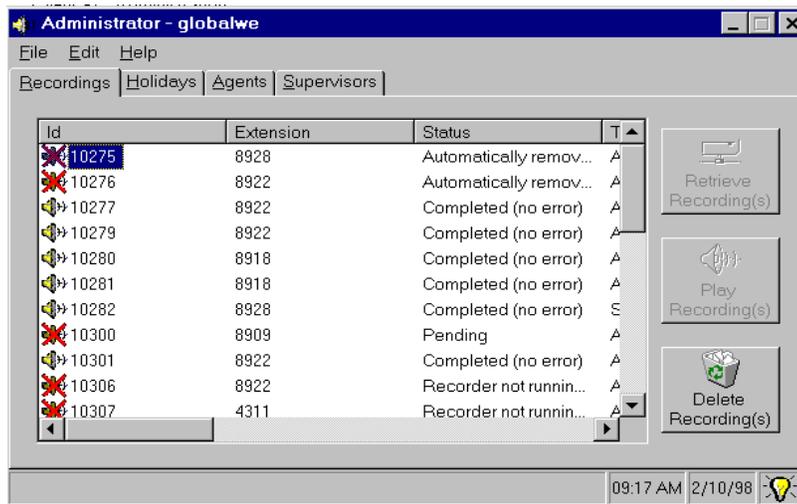
The Recordings tab of the Administrator window lists all Agent Assist recordings. From this tab, the administrator may:

- 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:

- This symbol indicates there is an associated voice file.



- This 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:

⇒ NOTE:

Not all of the status messages may occur.

- Pending — the recording is pending for a later time
- Rescheduled (complete) — the recording was completed after have been postponed and rescheduled
- Error (complete) — the recording was not processed due to inability to access a CentreVu® Messenger/CONVERSANT system port
- Actively Recording — the call is currently being recorded on a CentreVu® Messenger/CONVERSANT system port
- Completed (no error) — the recording completed normally
- Transferring request to recorder — the CentreVu® Messenger/CONVERSANT system is being notified to begin recording

- Deleted (not transferred) — the recording was deleted before it was sent to the CentreVu® Messenger/CONVERSANT system
- 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 CentreVu® Messenger/CONVERSANT system was not running
- Automatically removed by server — the server removed the recording based on the File Aging parameter (page 3-11)
- 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 AgentNow! applications
- Stored At — indicates the final recording storage location on the CentreVu® Messenger/CONVERSANT system; the default storage directory is ***/usr/add-on/pipeline/recordings/id#.adp***

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

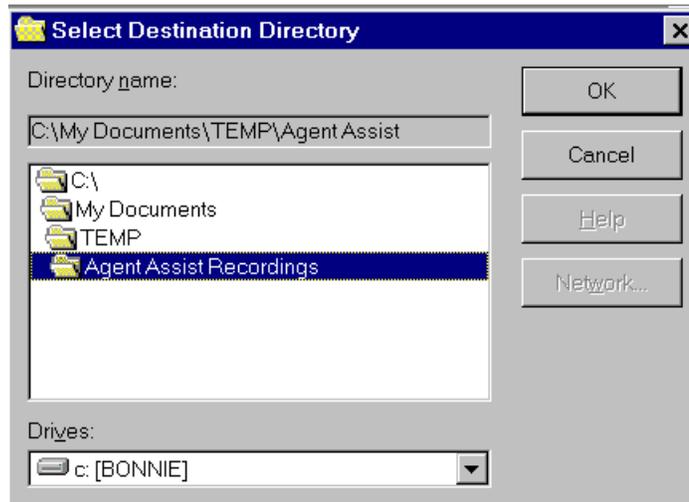
Use the procedure below to retrieve recordings through the client PC:

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 CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window.



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

The CentreVu® Messenger/CONVERSANT sound file(s) stored in CELP or ADPCM retrieved from the system are converted into the .WAV format and saved in the selected destination directory.



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 CentreVu® Messenger/CONVERSANT server via touch-tone a telephone

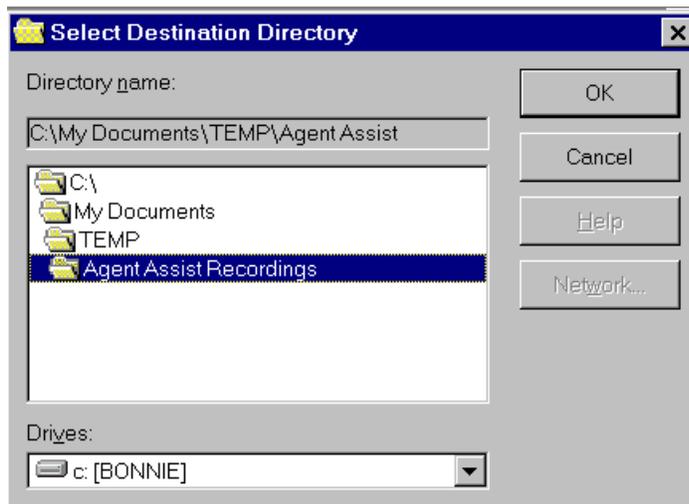
Playback Recordings Through the Client PC

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 CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window



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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory. The files are also displayed in the Task Bar at the bottom of the window.



The Multimedia recorder window is displayed and indicates at the top of the window which .WAV file is currently present for playback.



4. Click on the Play button to listen to the present recording.
5. 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 CentreVu® Messenger/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 3-7 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.

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.

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



⇒ 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 a CentreVu® Messenger/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 CentreVu® Messenger/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) (CentreVu® Messenger/CONVERSANT)	
CentreVu® Messenger/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 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 CentreVu® Messenger/CONVERSANT Ports. This option must be set to **Y** for the CORs to be associated to the CentreVu® Messenger/CONVERSANT ports that will be used for recording events.

General Tips for Changing Class of Restrictions

Find Station COR

To view agents and the CentreVu® Messenger/CONVERSANT system's COR, on the DEFINITY switch administration console

1. Enter **list station**

All agents and CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT ports.

Display COR Attributes

1. Once you have the COR number, enter **display COR** (COR number associated to the agents or CentreVu® Messenger/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.

- CentreVu® Messenger/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
- CentreVu® Messenger/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

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 CentreVu® Messenger/CONVERSANT observes consecutive agent calls during the specified time interval. As long as the supervisor has scheduled Agent Observing for a particular agent, the CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system.
3. The time to begin recording is reached and the CentreVu® Messenger/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 CentreVu® Messenger/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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system where a background process handles the triggering of recordings.

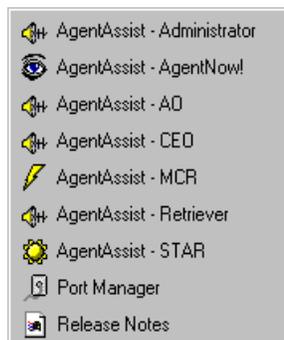
Use the procedure below to administer the Agent Observing application:

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

The system displays the list of Program folders.

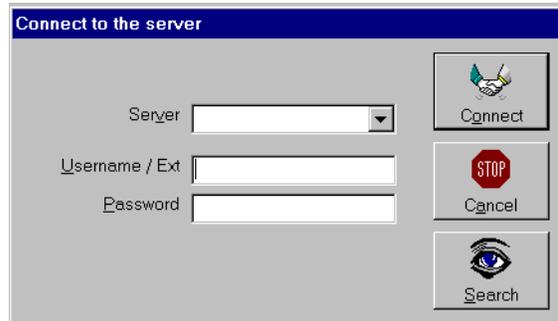
2. Select AgentAssist.

The system displays a list of applications.



3. 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.

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

The default password for the supervisor is “1234”.

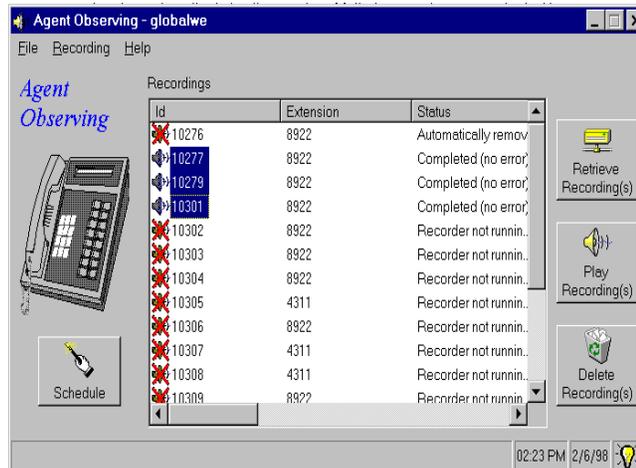
 **NOTE:**

It is recommended that you change the supervisor password and store it in a secure location.

8. Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/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 on 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.



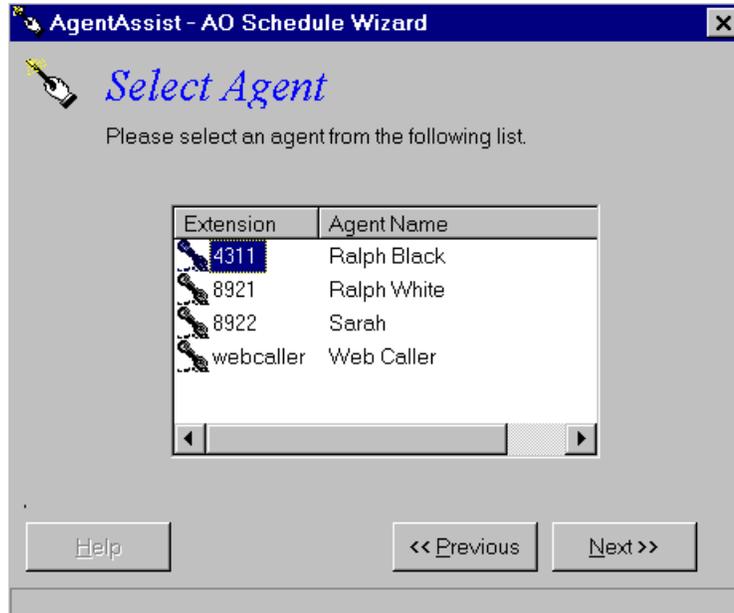
2. Click on Begin to start.



⇒ 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.

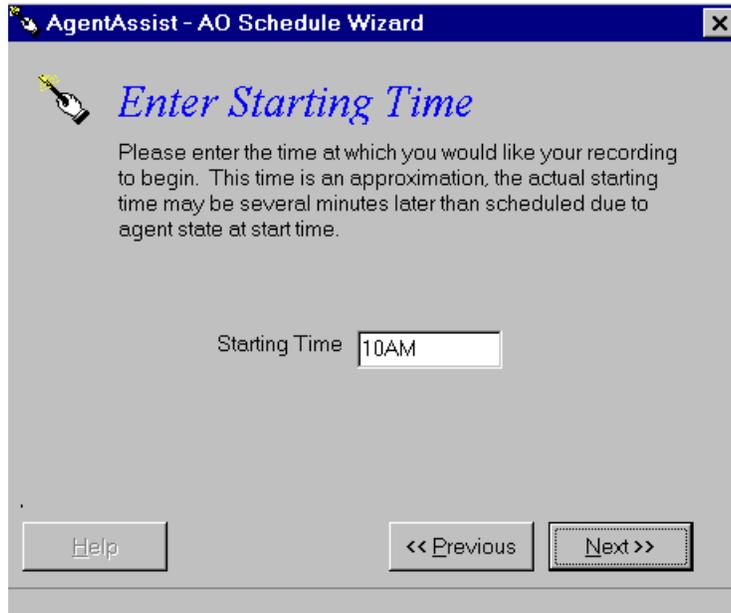
The system lists the Available Extension/Agent Name.



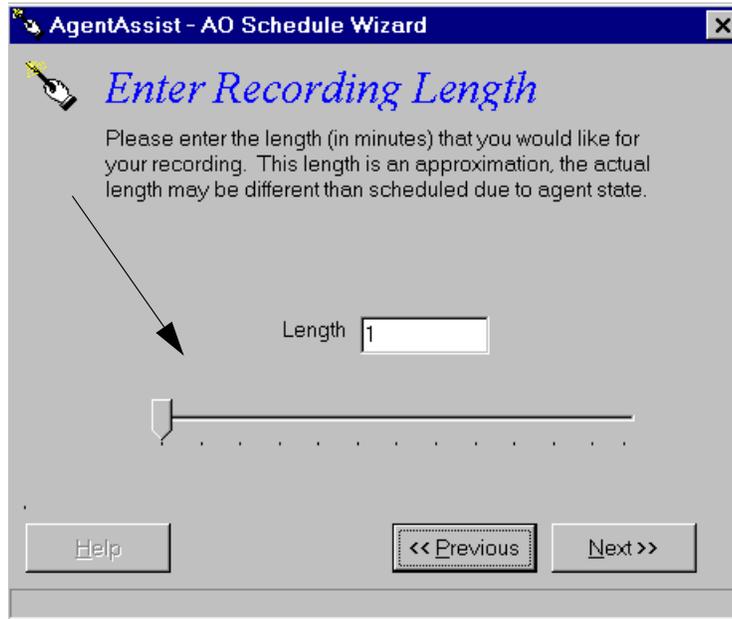
4. Select the Extension/Agent Name to schedule a single recording session. Click on Next to continue.



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



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

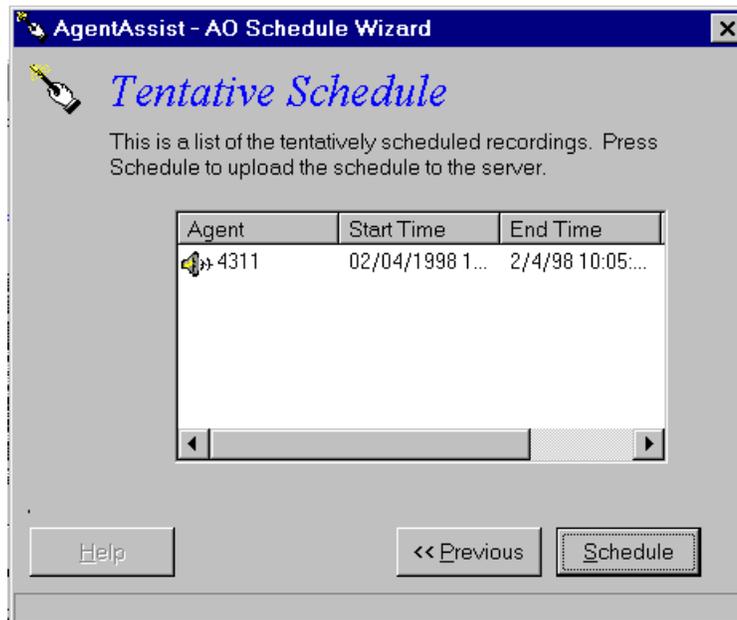


- Using the slide bar, select the recording length (in minutes) or type in the recording length (in minutes). Click on Next to continue.

⚠ CAUTION:

The recording length will impact the amount of hard disk space needed on the CentreVu® Messenger/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 CentreVu® Messenger/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.



- Click on 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 on Finish to complete the Scedule 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 on 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.

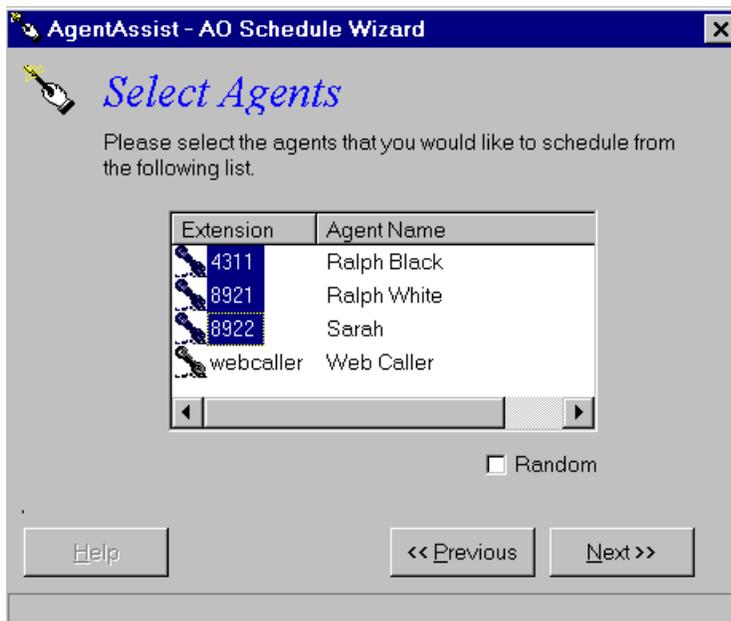
The system displays the initial Wizard window.



2. Click on Begin to start.



3. Select Multiple Agents/Multiple Recordings. Click on 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 activate scheduling of all agents assigned to the administering supervisor. With this active, all agents are sampled randomly 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.

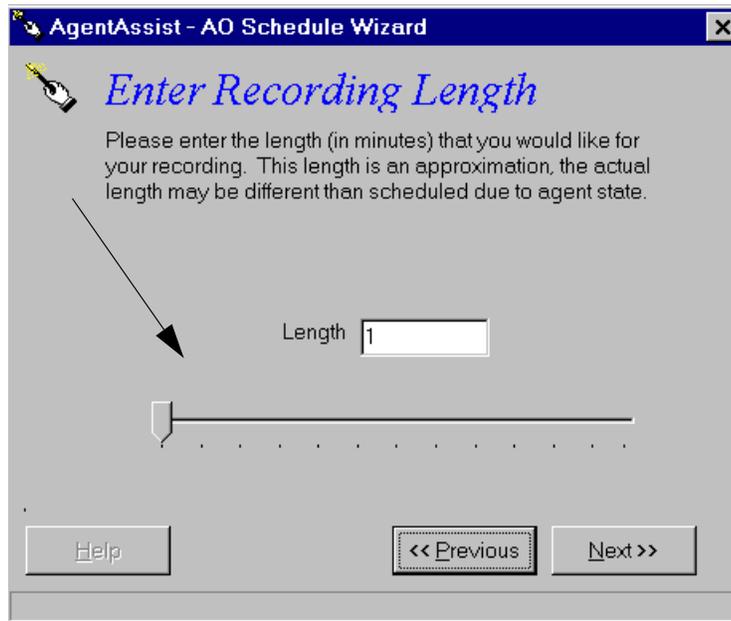
After selecting the appropriate agents, click on Next to continue.



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



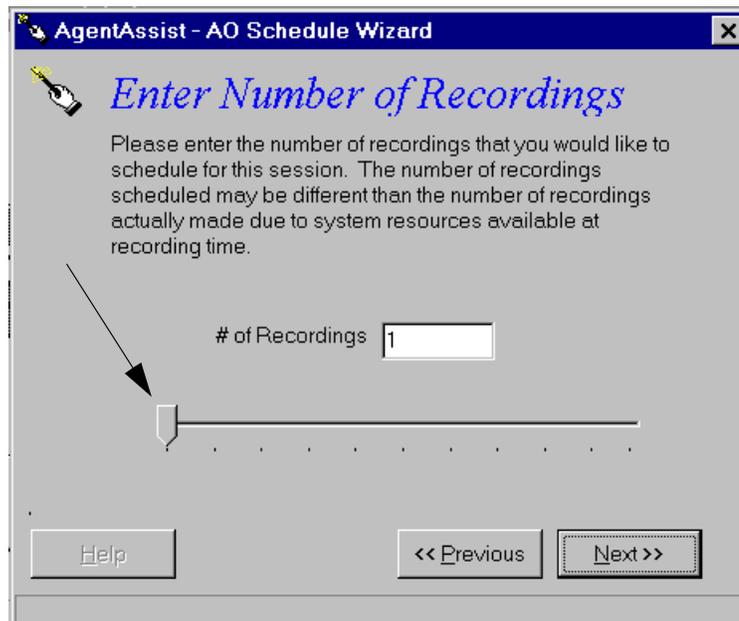
6. Select the recording ending date from the calendar. Click on Next to continue.



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

⇒ NOTE:

The recording length will impact the amount of hard disk space needed on the CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system for specific information about hard disk storage space.



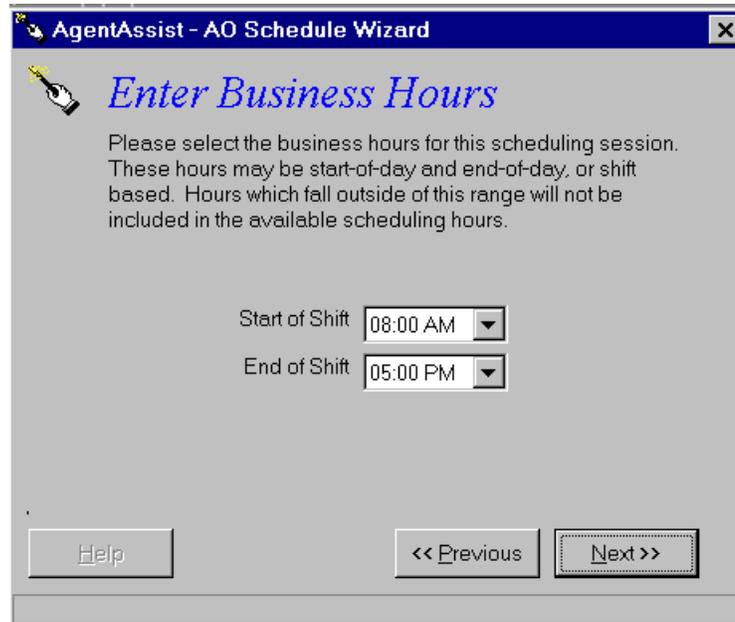
8. Use the slide bar or type in the number of recordings you would like to schedule. Click on Next to continue.



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



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

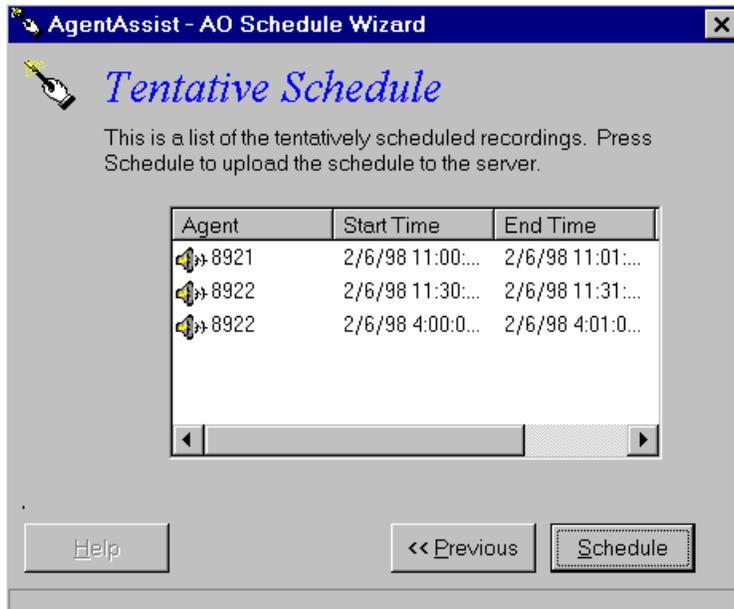


11. Select the business hours for this scheduling session from the following screen. Click on Next to continue.



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 on Next to continue.

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



13. Click on 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.

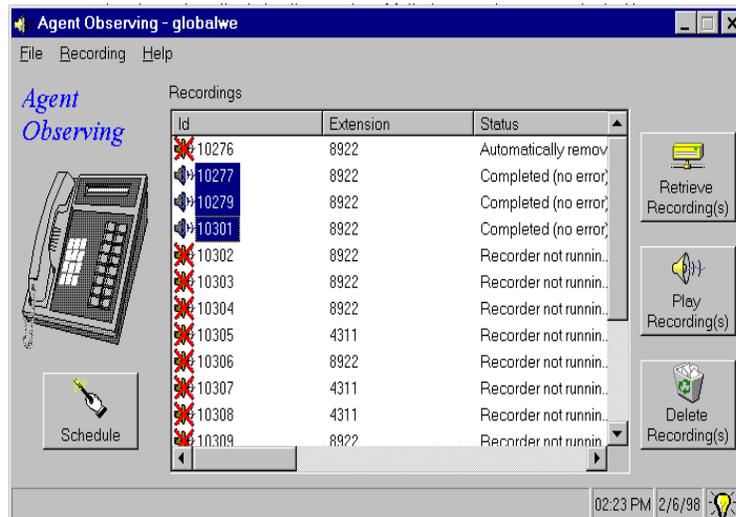


14. Click on Finish to complete the Schedule Wizard session.

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 Chapter 3, page 3-29.

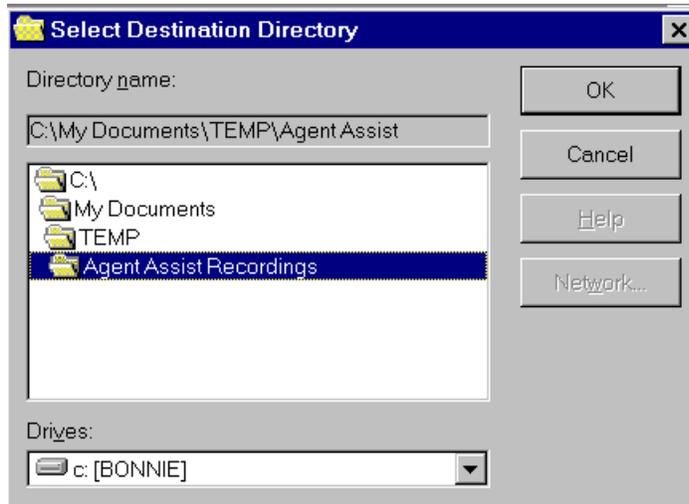


You may only retrieve those recordings that have an associated voice file (completed without errors).

2. Click on the Retrieve Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window:



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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory.

Playback Recordings

There are two methods by which to playback recordings:

- through the client PC (Multimedia player required)
- through the CentreVu® Messenger/CONVERSANT server via a touch-tone telephone

Playback Recordings through the Client PC

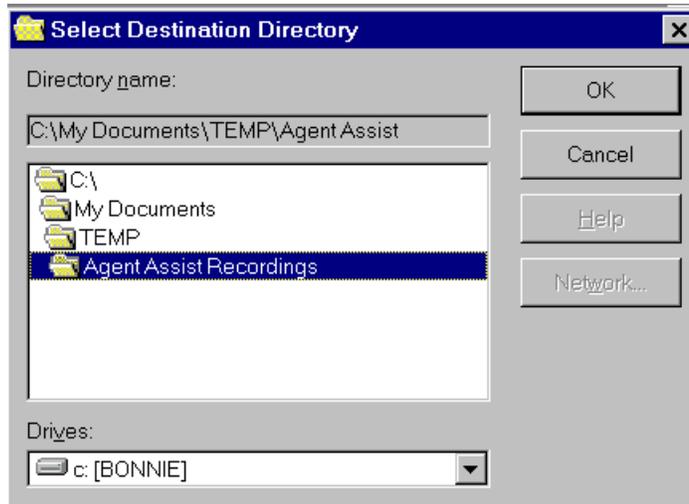
Use this procedure to listen to completed recordings from the client PC:

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 on the Play Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the CentreVu® Messenger/CONVERSANT server.

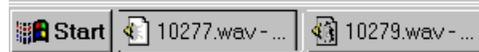
The system displays the Select Destination Directory window:





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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory. The files are also displayed in the Task Bar at the bottom of the screen.



The Multimedia recorder window is displayed and indicates at the top of the window which .WAV file is currently present for playback.



4. Click the Play button to listen to the present recording.
5. 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 CentreVu® Messenger/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 3-7 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. The original default password is ‘1234’.

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 on the Delete Recording(s) button. The system sends a message to the CentreVu® Messenger/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 sessions(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. The system sends a message to the CentreVu® Messenger/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.

 **WARNING:**

Once removed from the CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system.

 **CAUTION:**

It is highly recommended that recordings are periodically removed from the CentreVu® Messenger/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

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 CentreVu® Messenger/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 CentreVu® Messenger/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 CentreVu® Messenger/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.

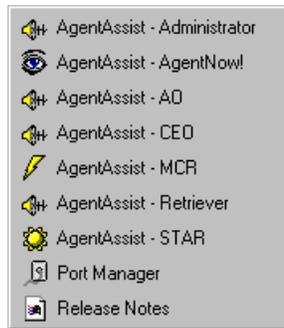
Accessing Malicious Call Recording

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.

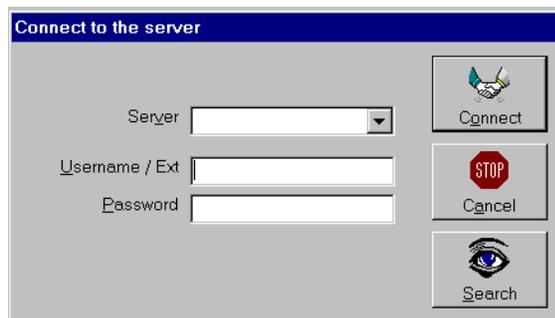
Log in to Malicious Call Recording

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

1. Windows 95 or Windows NT: From the Start menu, select Programs.
The system displays the list of Program folders.
2. Select Agent Assist.
- The system displays the list of applications.



3. 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".

4. In the server field, select or type a CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

The default agent password is "1234".

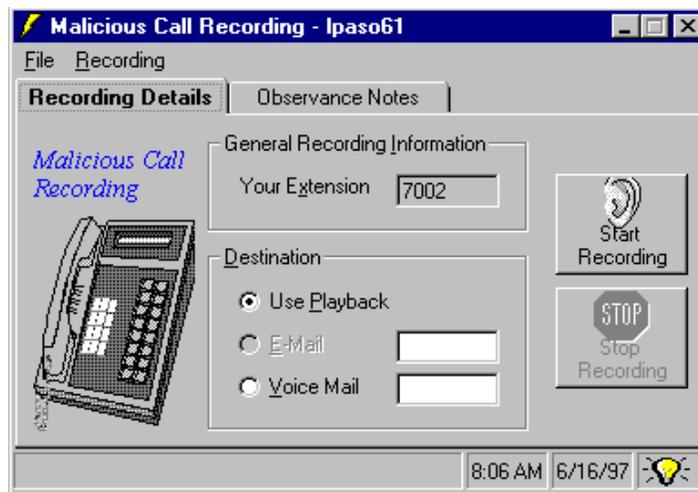
⇒ NOTE:

You should change the agent password and store it in a secure location. Change the password using the Administrator application as described in Chapter 3, "Agent Assist Administration".

7. Click the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The information from the CentreVu® Messenger/CONVERSANT system is downloaded to the client PC for the application session.

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



Instant Access to the Malicious Call Recording Application

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 CentreVu® Messenger/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.

5. Specify the method by which the recordings are stored with the Destination portion of the Recordings Details tab. This portion of the window has three fields:
 - Use Playback — The standard method of retrieving and storing samples. With this item selected, the completed recording samples are stored in the CentreVu® Messenger/CONVERSANT system until retrieved by the supervisor.
 - E-Mail — Included for future releases of the Agent Assist software.
 - Voice Mail — Included for future releases of the Agent Assist software.

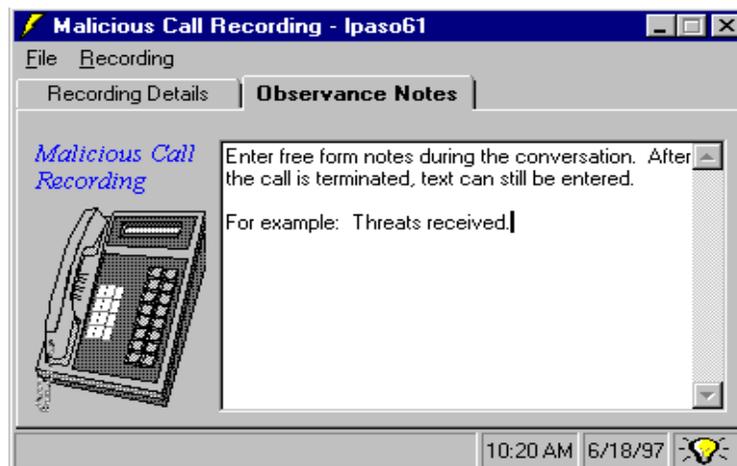
Enter Observation Notes

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 CentreVu® Messenger/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:

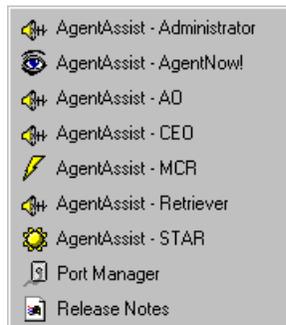
Any text entered is displayed with the recording information in the Notes field of the Recording Retriever window.

Recordings Retrieval

By design, the Malicious Call Recording 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.

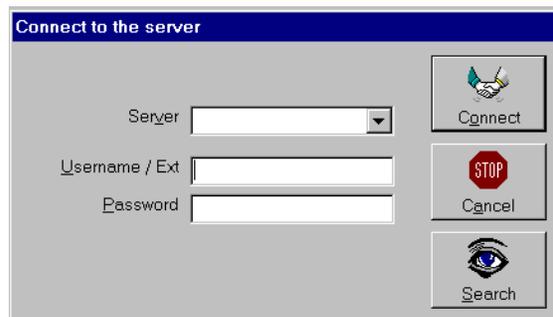
Use the procedure below to use the Recording Retriever:

1. Windows 95 or Windows NT: From the Start menu, select Programs.
The system displays the list of Program folders.
2. Select Agent Assist.
The system displays the list of applications.



3. Select AgentAssist-Retriever.

The system displays the initial agent login window.



4. In the server field, select or type an CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

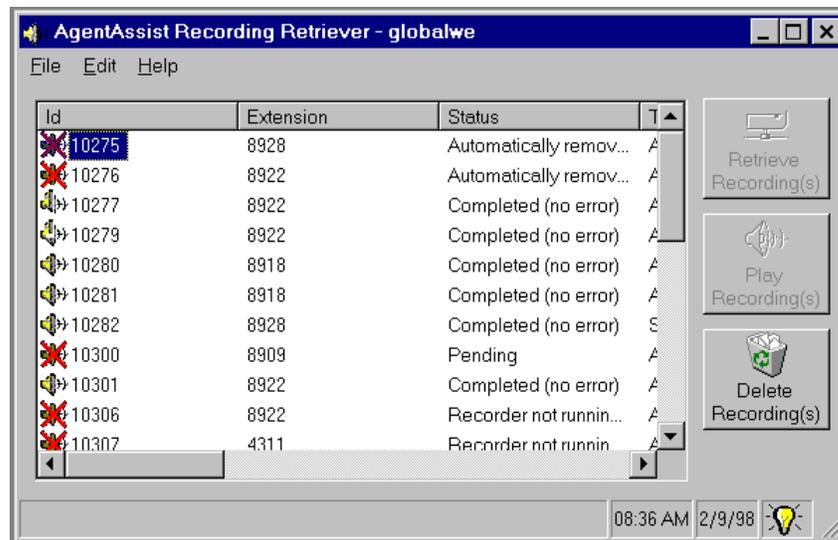
The default agent password is **"1234"**.

7. Click the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.



The information from the CentreVu® Messenger/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.



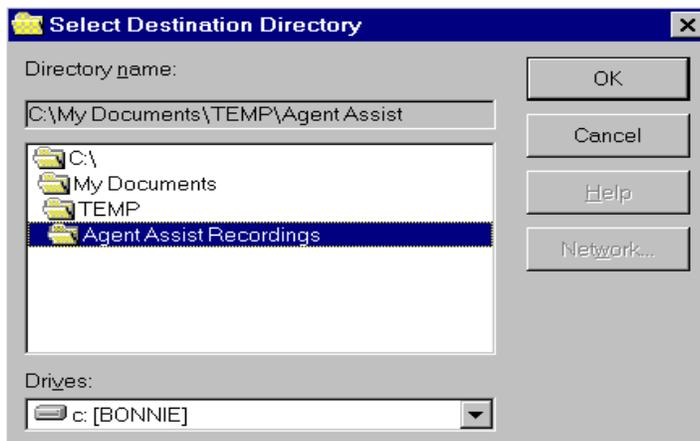
8. Highlight the recording(s) you wish to retrieve from the list in the window. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.



9. Click the Retrieve Recording button.

The system retrieves the CELP or ADPCM sound file from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window.



10. Select the location (folder or floppy diskette) to save the retrieved recording(s).
11. The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory.

⇒ NOTE:

The Retrieve Recording(s) option is designed as an application to gather successful recordings. You may wish to distribute this application on a stand-alone basis for users who you wish to manage these recordings for supervisors and/or groups of agents.

Playback Recordings

There are two methods by which to playback recordings:

- through the client PC (Multimedia player required).
- through the CentreVu® Messenger/CONVERSANT server via touch-tone telephone.

Playback Recordings through the Client PC

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

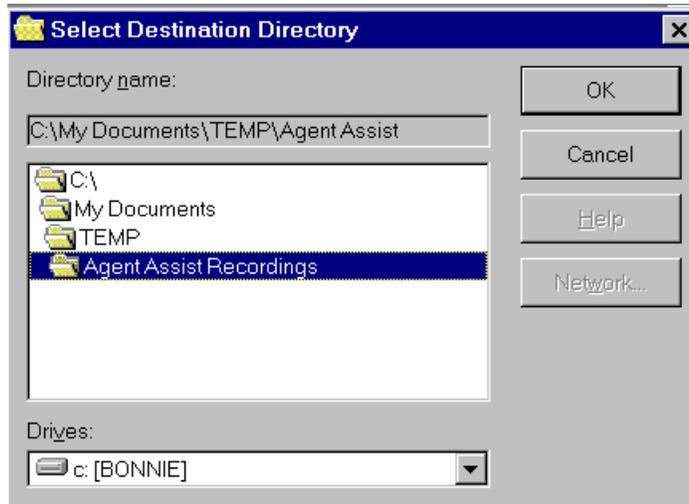
1. Start at the Agent Assist Recording Retriever window. Highlight the recording(s) you wish to playback. Multiple recordings are selected by pressing and holding down the “Control” key while clicking on the desired recordings.

2. Click on the Play Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window:





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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory. The files are also displayed in the Task Bar at the bottom of the screen.



The Multimedia recorder window is displayed and indicates at the top of the window which .WAV file is currently present for playback.



4. Click the Play button to listen to the present recording.
5. 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 CentreVu® Messenger/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 3-7 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. The original default password is ‘1234’.

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 CentreVu® Messenger/CONVERSANT system.

CAUTION:

You should periodically remove recording from the CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system. The textual components of the message remain on the system.

WARNING:

Once removed from the CentreVu® Messenger/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 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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system.
3. The time to begin recording is reached and the CentreVu® Messenger/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.
4. The recording stops and is stored on the CentreVu® Messenger/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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system.



CAUTION:

Any application with a higher port contention priority (Malicious Call Recording, AgentNow!, and S.T.A.R.) “bump” 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 CentreVu® Messenger/CONVERSANT system where a background process handles the triggering of recordings.

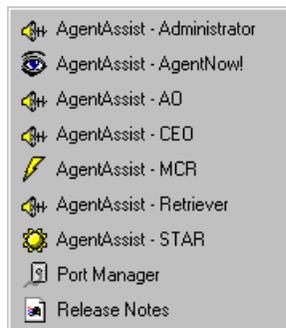
Use the procedure below to administer the C.E.O. application:

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

The system displays the list of Program folders.

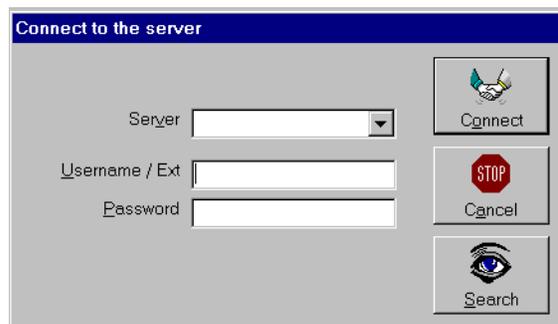
2. Select Agent Assist.

The system displays the list of applications.



3. 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.

4. In the Server field, select or type a CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

The default password for the supervisor is “1234”.

⇒ NOTE:

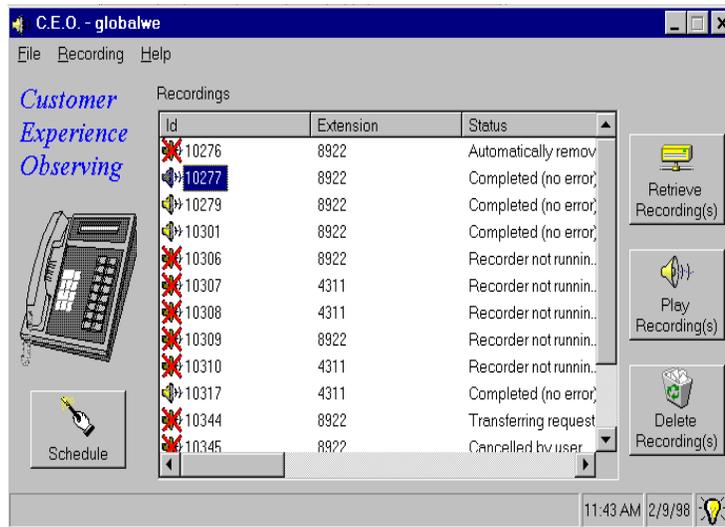
You should change the supervisor password and store it in a secure location. Change the password using the Administrator application as described in Chapter 3, “Agent Assist Administration”.



7. Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The information from the CentreVu® Messenger/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:

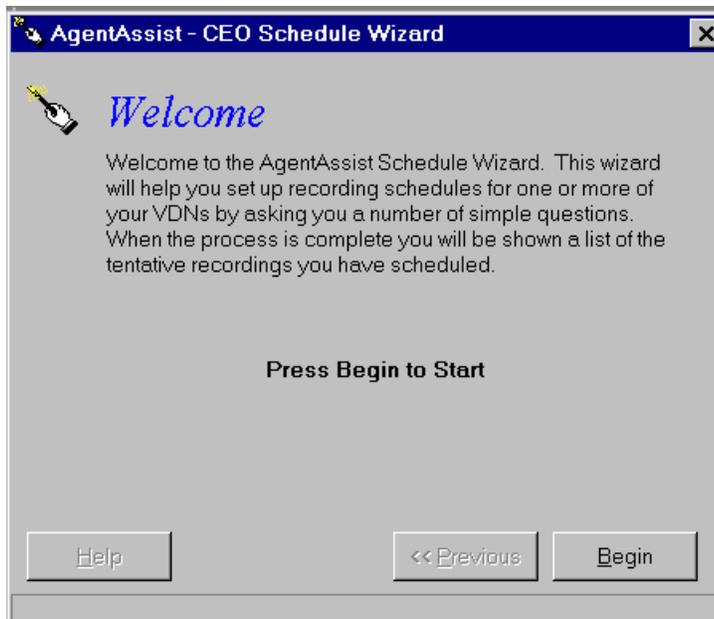
1. Select the Schedule Wizard from the Recording menu or click on the Schedule icon on the C.E.O. window.



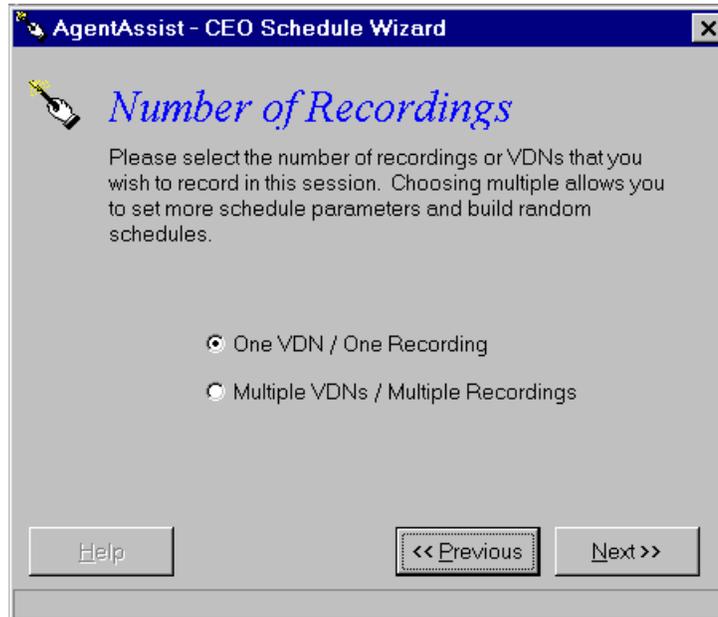
NOTE:

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 on Begin to start.

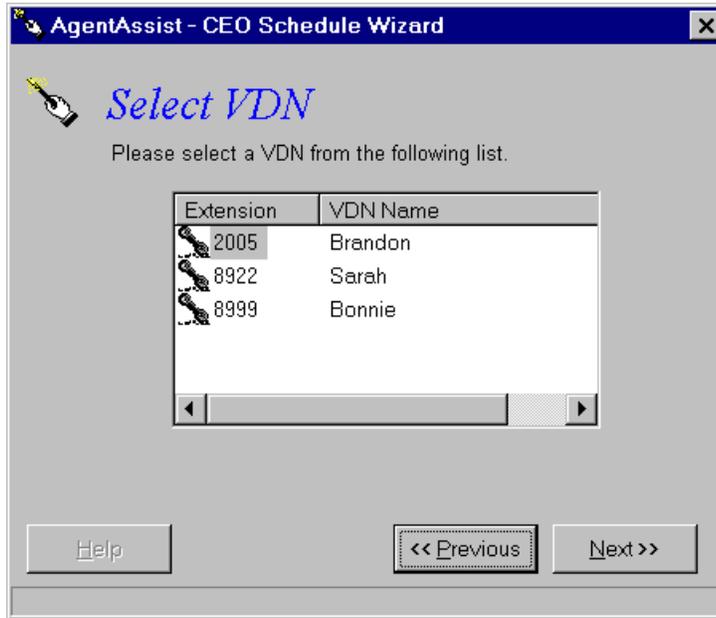


NOTE:

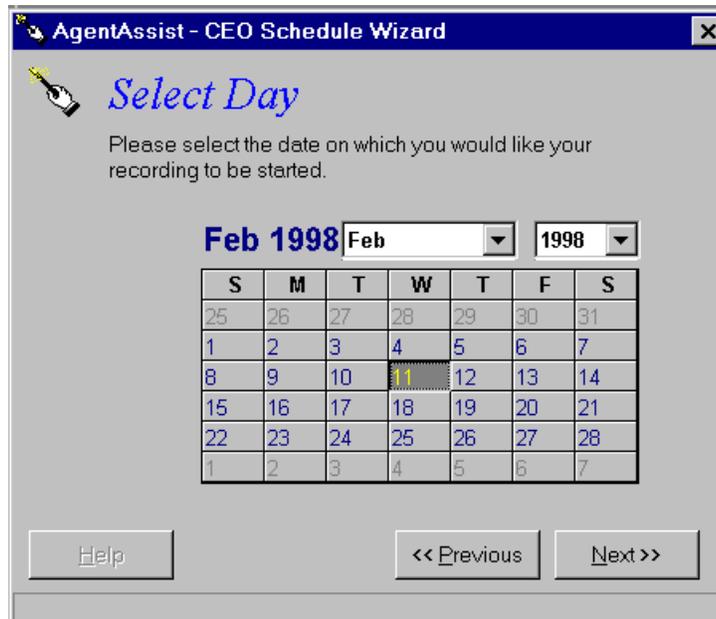
Multiple VDNs/Multiple Recordings allows the supervisor to set schedule parameters and build random schedules of recordings or VDNs based on recording hours.

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.



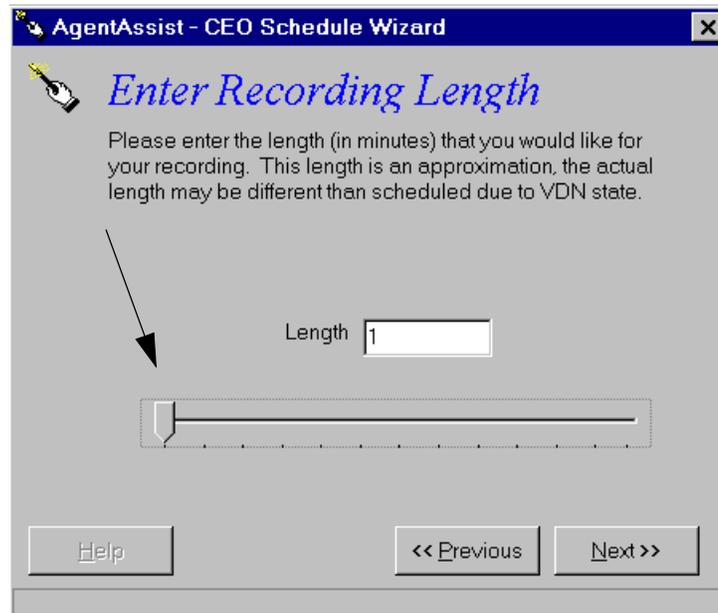
4. Select the VDN to schedule a single recording session. Click on Next to continue.



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



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



- Using the slide bar or type in the recording length (in minutes). Click on 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 540 minutes (9 hours).

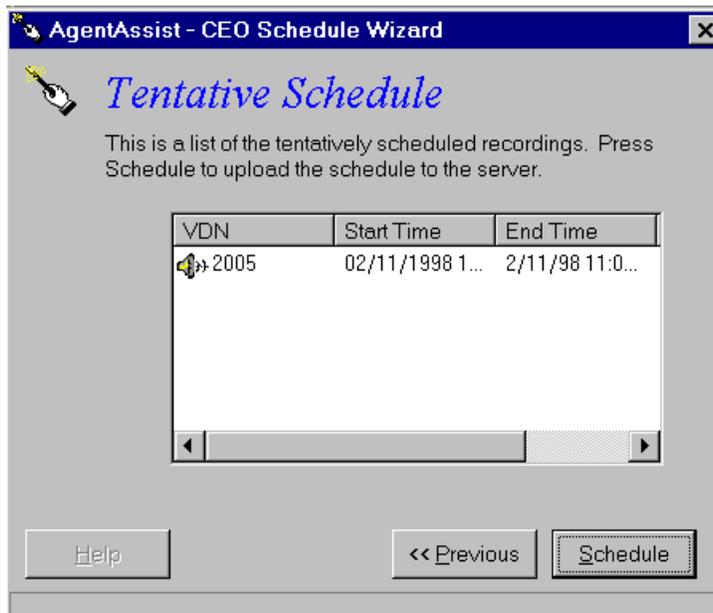
⚠ CAUTION:

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 CentreVu® Messenger/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.



- Click on 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 on 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 on 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.

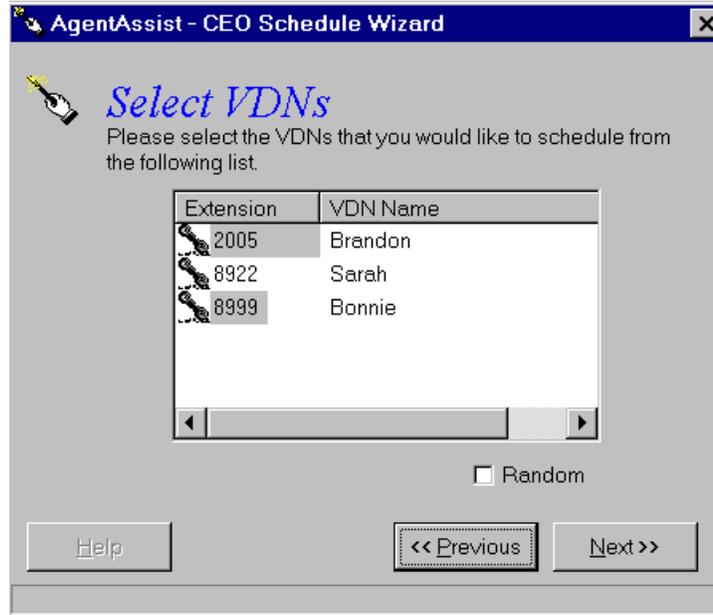
The system displays the initial Wizard window.



2. Click on Begin to start.



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

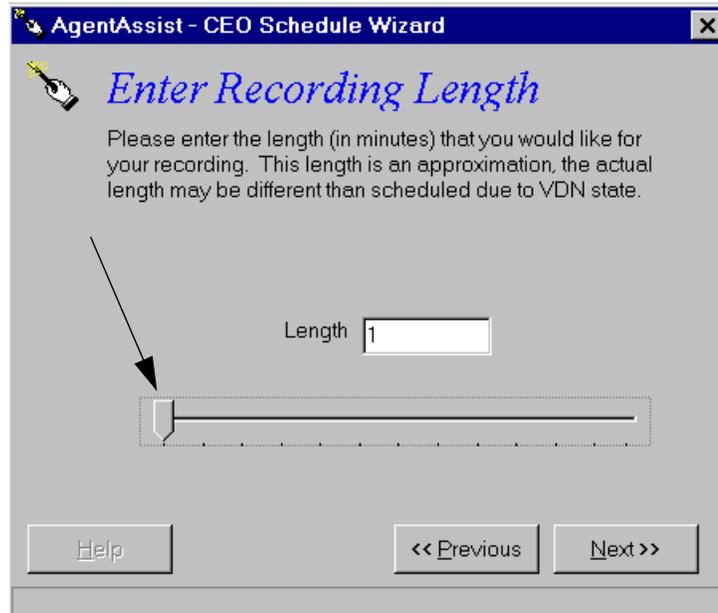
Random — Checking the Random box activates the scheduling of all VDNs assigned to the administering supervisor. With this active, all VDNs are sampled randomly during the period assigned in the Scheduling tab of this window. The number of samples assigned in the # Recordings field is performed until the session is complete.



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



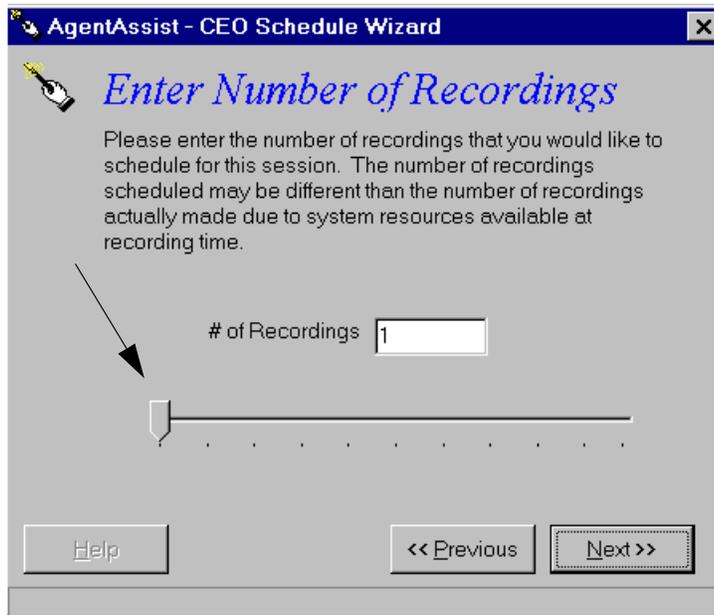
6. Select the recording ending date from the calendar. Click on Next to continue.



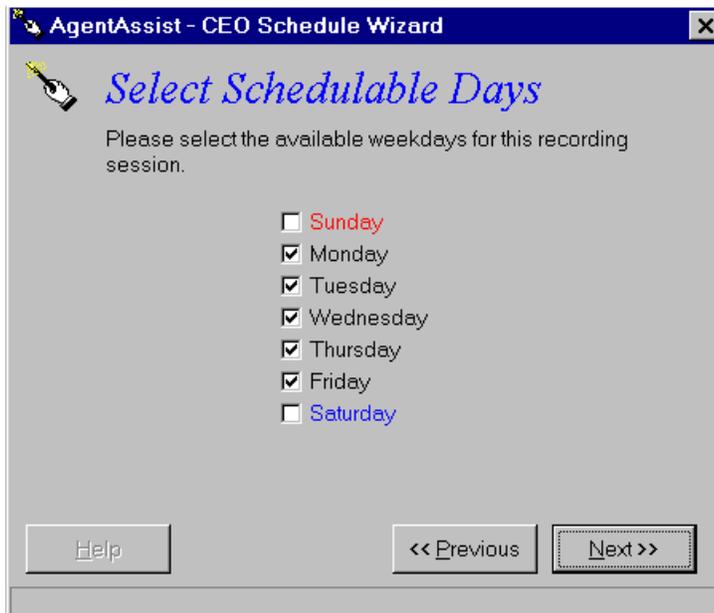
7. Use the slide bar or type in the recording length (in minutes). Click on Next to continue.

⚠ 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 CentreVu® Messenger/CONVERSANT system for specific information about hard disk storage space.



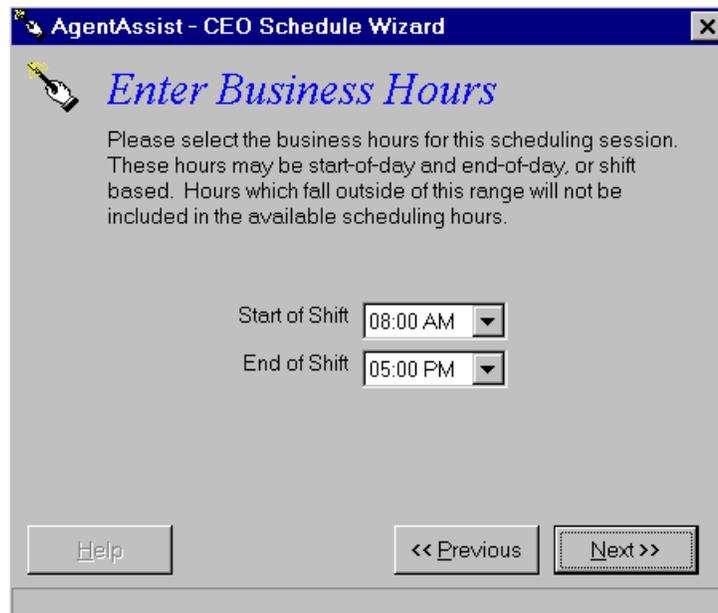
8. Use the slide bar or type in the number of recordings you would like to schedule. Click on Next to continue



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



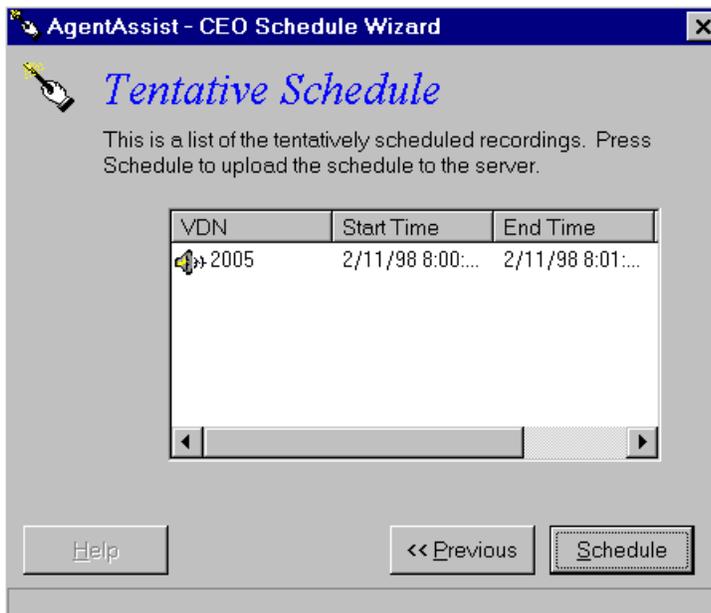
10. Select Yes to include holidays or No to exclude holidays. Click on Next to continue. Select Yes to include holidays or No to exclude holidays. Click on Next to continue.



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



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



13. The following 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.

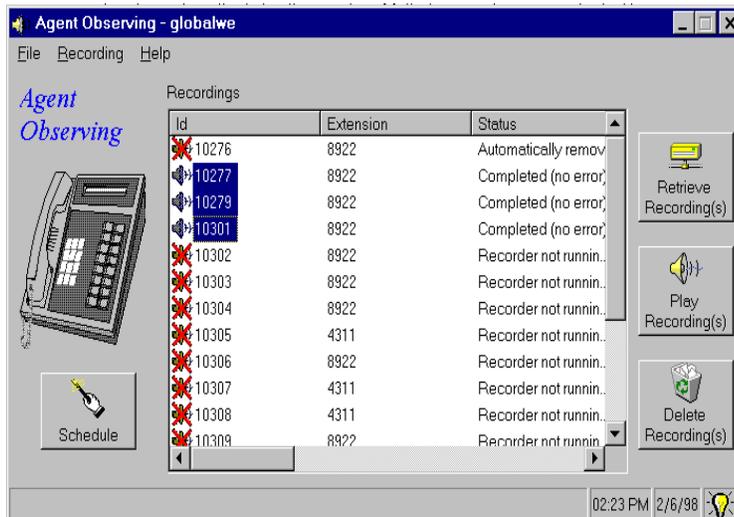


14. Click on Finish to complete the Schedule Wizard session.

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 3-29.

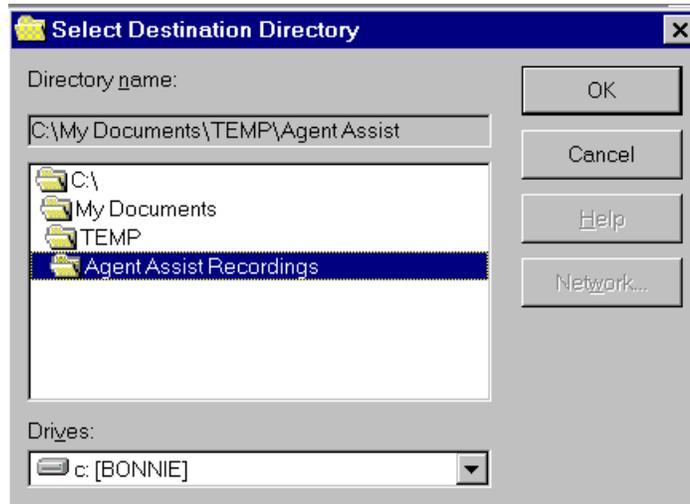
You may only retrieve those recordings that have an associated voice file (completed without errors).

2. Click on the Retrieve Recording(s) button.

The system retrieves the CELP or ADPCM sound file(s) from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window:





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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory.

Playback Recordings

There are two methods by which to playback recordings:

- through the client PC (Multimedia player required)
- through the CentreVu® Messenger/CONVERSANT server via a touch-tone telephone

Playback Recordings through the Client PC

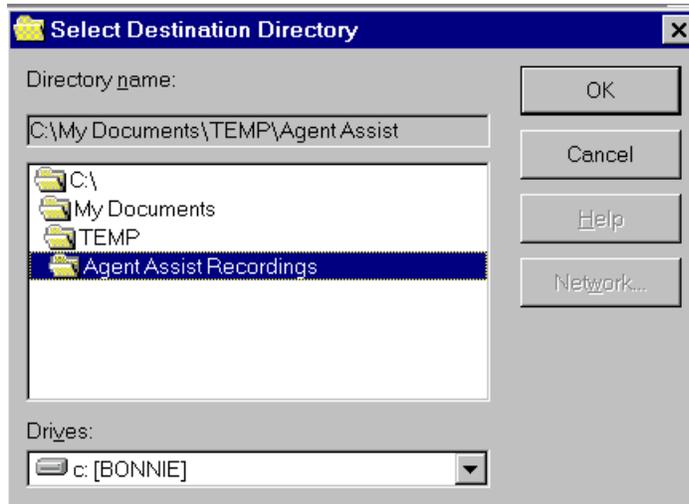
Use this procedure to listen to completed recordings from the client PC:

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 on the Play Recording(s) button.



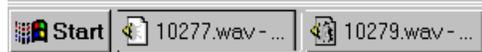
The system retrieves the CELP or ADPCM sound file(s) from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window:



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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory. The files are also displayed in the Task Bar at the bottom of the screen.



The Multimedia recorder window is displayed and indicates at the top of the window which .WAV file is currently present for playback.



4. Click the Play button to listen to the present recording.
5. 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 CentreVu® Messenger/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 3-7 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. The original default password is '1234'.

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 on the Delete Recording(s) button. The system sends a message to the CentreVu® Messenger/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 CentreVu® Messenger/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. 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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system.

 **CAUTION:**

It is highly recommended that recordings are periodically removed from the CentreVu® Messenger/CONVERSANT system to save space on the system disk.

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

7

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

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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system. Once a S.T.A.R. session is started, recording begins on the CentreVu® Messenger/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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system.

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

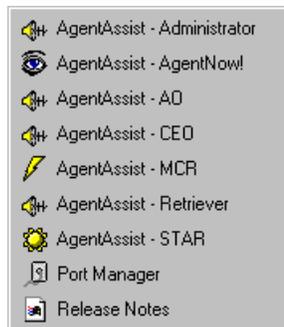
Accessing S.T.A.R.

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.

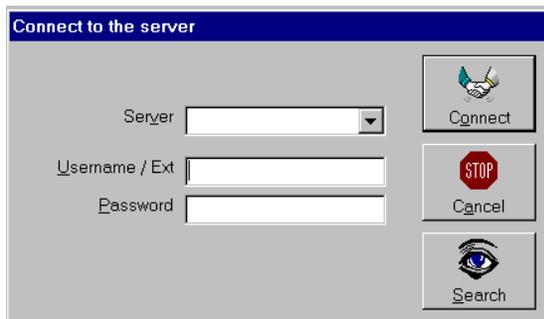
Log in to Spontaneous Telephony Agent Recording

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

1. Windows 95 or Windows NT: From the Start menu, select Programs.
The system displays the list of Program folders.
2. Select Agent Assist.
- The system displays the list of applications.



3. 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”.

4. In the Server field, select or type a CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

The default agent password is "1234".

⇒ NOTE:

It is recommended that you change the agent password and store it in a secure location. Passwords are administered by the Administrator application as described in Chapter 3, "Agent Assist Administration".

7. Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The information from the CentreVu® Messenger/CONVERSANT system is downloaded to the client PC for the application session.

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

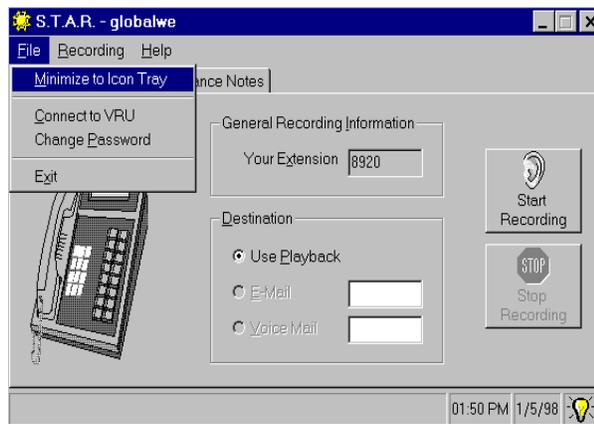


Instant Access to the S.T.A.R. Application

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.



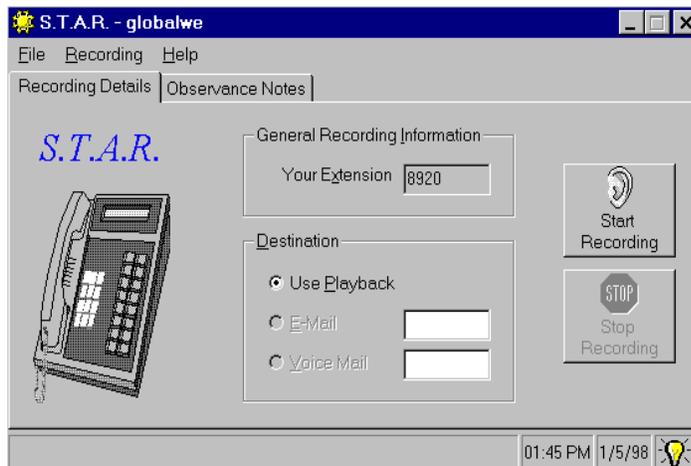
Click this icon at any time to initiate a S.T.A.R. recording session.

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 CentreVu® Messenger/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.

5. Specify the method by which the recordings are stored with the Destination portion of the Recordings Details tab. This portion of the window has three fields:
 - Use Playback — The standard method of retrieving and storing samples. With this item selected, the completed recording samples are stored in the CentreVu® Messenger/CONVERSANT system until retrieved by the supervisor.
 - E-Mail — Included for future releases of the Agent Assist software.
 - Voice Mail — Included for future releases of the Agent Assist software.

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 CentreVu® Messenger/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 3-10, 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

By design, the S.T.A.R. 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.

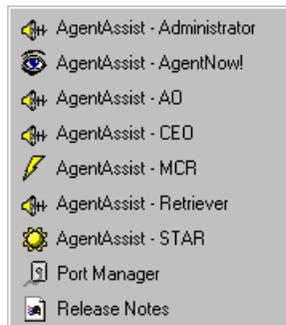
Use the procedure below to use the Recording Retriever:

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

The system displays the list of Program folders.

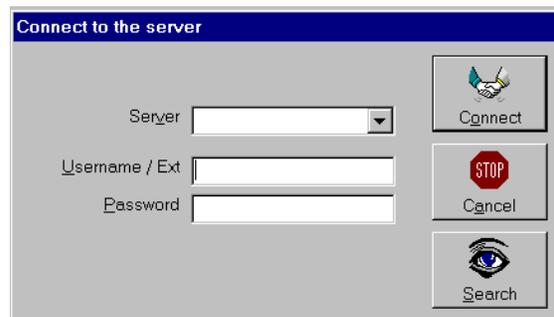
2. Select Agent Assist.

The system displays the list of applications.



3. Select AgentAssist-Retriever.

The system displays the initial agent login window.



4. In the server field, select or type a CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

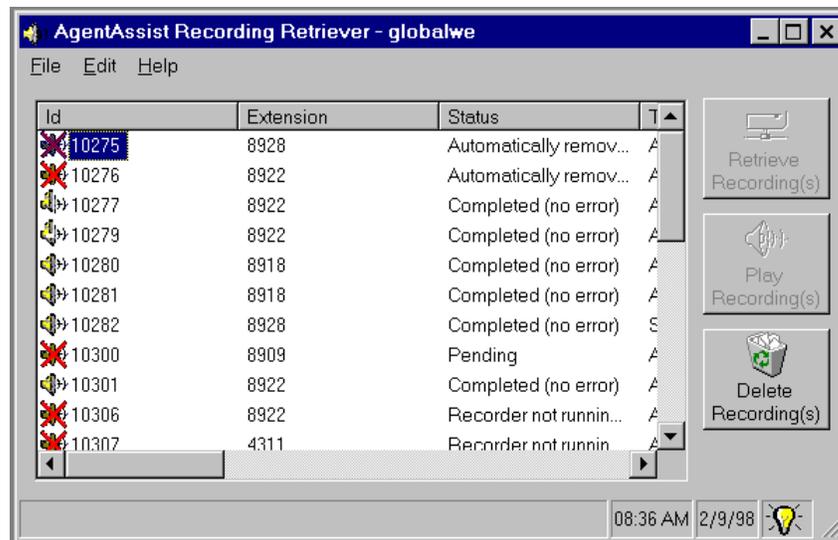
The default agent password is "1234".

7. Click the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.



The information from the CentreVu® Messenger/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.



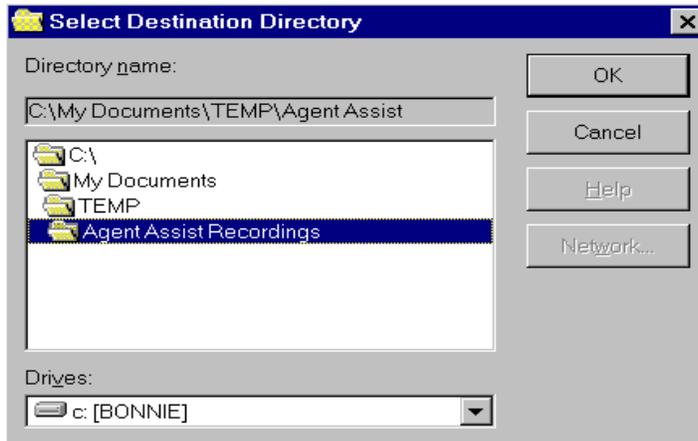
8. Highlight the recording(s) you wish to retrieve from the list in the window. To select multiple recordings, hold down the Control key while clicking on items to be retrieved.



9. Click the Retrieve Recording button.

The system retrieves the CELP or ADPCM sound file from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window.



10. Select the location (folder or floppy diskette) to save the retrieved recording(s).
11. The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory.

⇒ 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 CentreVu® Messenger/CONVERSANT server

Playback Recordings through the Client PC

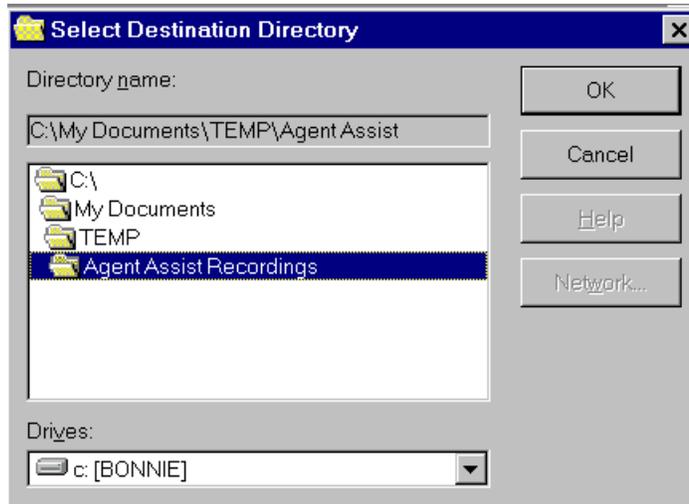
Use this procedure to listen to completed recordings from the client PC:

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 CentreVu® Messenger/CONVERSANT server.

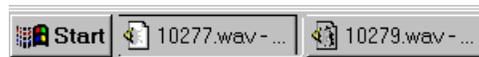
The system displays the Select Destination Directory window:





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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory. The files are also displayed in the Task Bar at the bottom of the screen.



The Multimedia recorder window is displayed and indicates at the top of the window which .WAV file is currently present for playback.



4. Click the Play button to listen to the present recording.
5. 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 CentreVu® Messenger/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 3-7 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. The original default password is ‘1234’.

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 CentreVu® Messenger/CONVERSANT system.

CAUTION:

You should periodically remove recordings from the CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system. The textual components of the message remain on the system.

WARNING:

Once removed from the CentreVu® Messenger/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 CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT system. Once the AgentNow! session is started, recording begins on the CentreVu® Messenger/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 CentreVu® Messenger/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

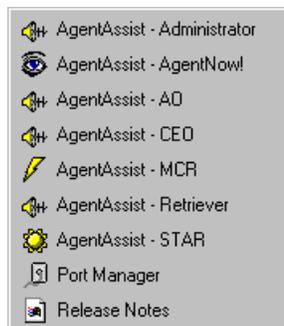
Use the procedure below to log in to the AgentNow! application:

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

The system displays the list of Program folders.

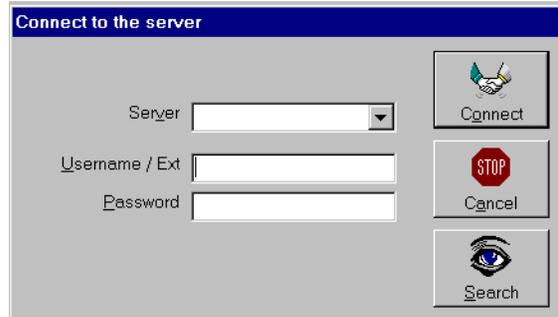
2. Select Agent Assist.

The system displays the list of applications.



3. 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”.

4. In the Server field, select or type a CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

The default supervisor password is “1234”.

⇒ NOTE:

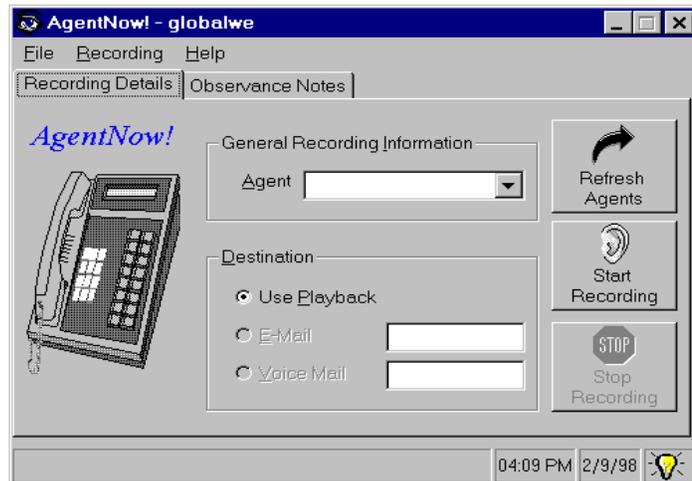
It is recommended that you change the supervisor password and store it in a secure location. Passwords are administered by the Administrator application as described in Chapter 3, “Agent Assist Administration”.

7. Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The information from the CentreVu® Messenger/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.



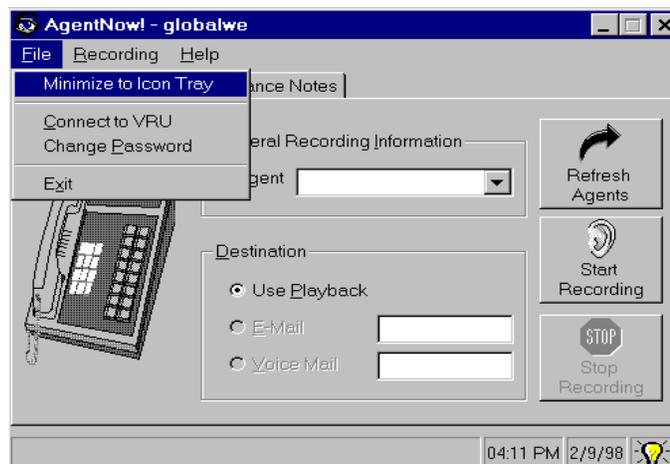


Instant Access to the AgentNow! Application

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 an instant access icon (the eye) from the icon tray at the bottom of the Windows screen.



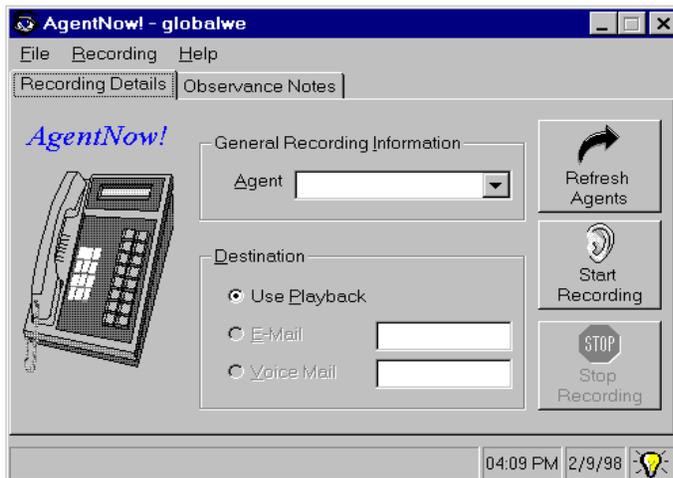
Click this icon at any time to initiate a AgentNow! recording session.

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 CentreVu® Messenger/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.
6. Specify the method by which the recordings are stored with the Destination portion of the Recordings Details tab. This portion of the window has three fields:
 - Use Playback — The standard method of retrieving and storing samples. With this item selected, the completed recording samples are stored in the CentreVu® Messenger/CONVERSANT system until retrieved by the supervisor.
 - E-Mail — Included for future releases of the Agent Assist software.
 - Voice Mail — Included for future releases of the Agent Assist software.

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 CentreVu® Messenger/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:

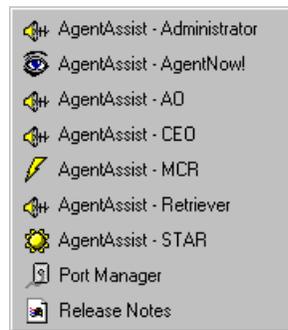
Any text entered is displayed with the recording information in the Notes field of the Recording Retriever window.

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 3-29.

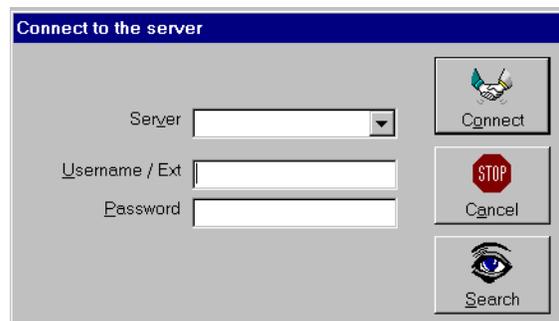
Use the procedure below to use the Recording Retriever:

1. Windows 95 or Windows NT: From the Start menu, select Programs.
The system displays the list of Program folders.
2. Select Agent Assist.
The system displays the list of applications.



3. Select AgentAssist-Retriever.

The system displays the initial supervisor login window.



- In the Server field, select or type an CentreVu® Messenger/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 CentreVu® Messenger/CONVERSANT systems.

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

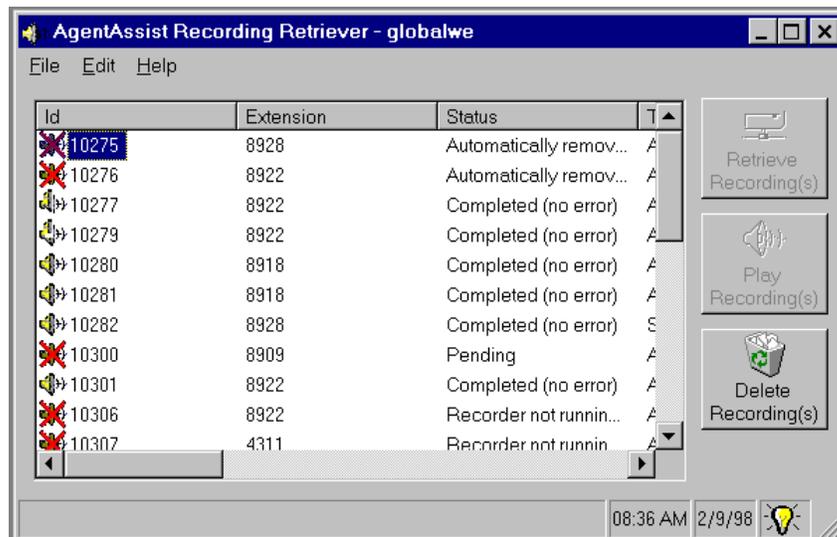


The default supervisor password is “1234”.

- Click on the Connect button to connect the client PC to the selected CentreVu® Messenger/CONVERSANT system.

The information from the CentreVu® Messenger/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.

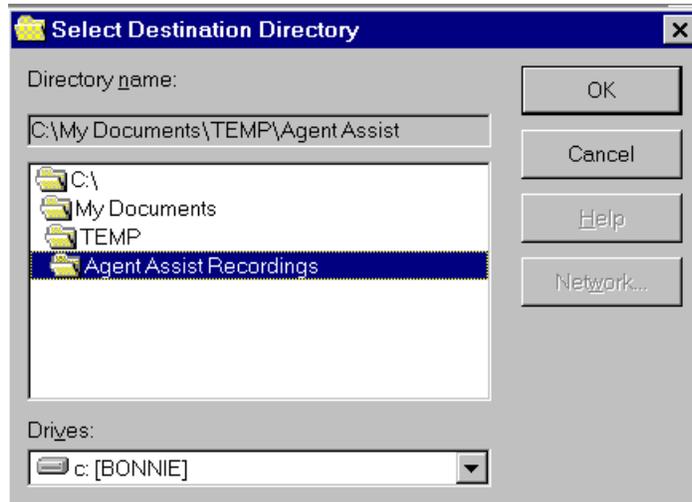


- Highlight the recording you wish to retrieve from the list in the window.
- Click on the Retrieve Recording button.



The system retrieves the CELP or ADPCM sound file from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window:



10. Select the location (folder or floppy diskette) to save the retrieved records. The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory.

Playback Recordings

There are two methods by which to playback recordings:

- through the client PC (Multimedia player required)
- through the CentreVu® Messenger/CONVERSANT server via touch-tone a telephone

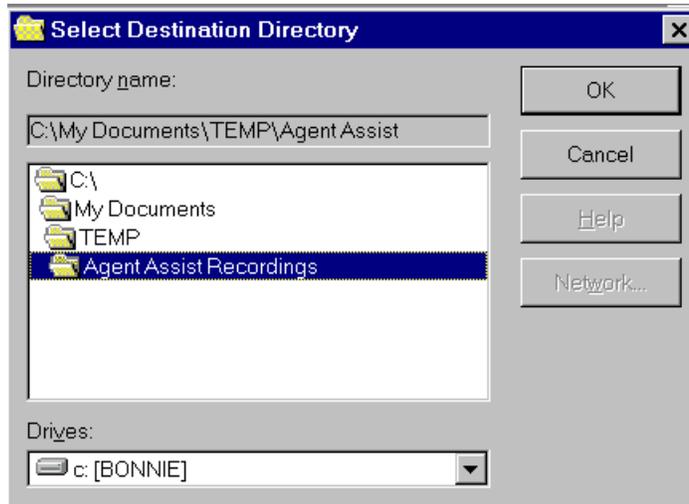
Playback Recordings through the Client PC

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.

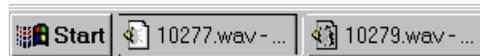
The system retrieves the CELP or ADPCM sound file(s) from the CentreVu® Messenger/CONVERSANT server.

The system displays the Select Destination Directory window:



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

The CELP or ADPCM sound file(s) retrieved from the CentreVu® Messenger/CONVERSANT system are converted in the .WAV format and saved in the selected destination directory. The files are also displayed in the Task Bar at the bottom of the screen.



The Multimedia recorder window is displayed and indicates at the top of the window which .WAV file is currently present for playback.



4. Click the Play button to listen to the present recording.
5. 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 CentreVu® Messenger/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 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. The original default password is '1234'.

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 CentreVu® Messenger/CONVERSANT system.

CAUTION:

You should periodically remove recordings from the CentreVu® Messenger/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.



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

WARNING:

Once removed from the CentreVu® Messenger/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 CentreVu® Messenger/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.

Table 9-1. Agent Assist Troubleshooting

Problem	Resolution
Calls are not being recorded	<ol style="list-style-type: none"> 1. Verify the voice system is running. <ol style="list-style-type: none"> a. Log on to the CentreVu® Messenger/CONVERSANT system as root. b. At the prompt enter start_vs 2. Verify the plrecord is running. <ol style="list-style-type: none"> a. Log on to the CentreVu® Messenger/CONVERSANT system as root. b. At the UNIX prompt enter ps -ef pg Look for /usr/add-on/pipeline/plrecord. c. If not found, enter cd /usr/add-on/pipeline 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. <ol style="list-style-type: none"> 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. <ol style="list-style-type: none"> a. From the client PC, open the Agent Assist Port Manager. b. Verify the Switch FAC is the same as the DEFINITY switch
Customer Experience Observing calls not recording.	<p>Verify the VDN selected to record is a valid VDN on the DEFINITY switch.</p> <ol style="list-style-type: none"> 1. Log onto the DEFINITY switch. 2. At the prompt enter list vdn <p>This will list the valid VDNs on the switch. Look for the VDN.</p>

Continued on next page

Table 9-1. Agent Assist Troubleshooting — Continued

Problem	Resolution
Recordings not removed automatically from the server.	<ol style="list-style-type: none"> 1. Log on to the CentreVu® Messenger/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/pipeline 6. Enter plsvrstart 7. Verify server is running by entering ps -ef grep pl Look for the process ID for plserver.
Agents are not being recorded.	<ol style="list-style-type: none"> 1. Verify agent information was entered correctly in the Agent Assist Administrator. 2. Verify the agent extensions have been defined in the switch.
Invalid user name or password.	<ol style="list-style-type: none"> 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.)
Receive message 32004 unable to locate gtiserv.	<p>Using the README.TXT file supplied with the software, verify the gtiserv, gticInt, and gtisrvr entries are in the following directory file:</p> <ul style="list-style-type: none"> ■ For Windows 95, edit the \windows\services file <p>OR</p> <ul style="list-style-type: none"> ■ For Windows NT, edit the \winnt\system32\drivers\etc\services file

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