Lucent Technologies
Bell Labs Innovations

INTUITY™ CONVERSANT® System

Customer Assist
Windows Administration

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Comcode 108368366
Issue 1
December 1998

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- Routed to a recorded announcement that can be administered by the CPE user

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Contents

About This Document

This section introduces you to the Customer Assist Windows Administration document. It also directs you to additional related documentation.

Intended Audiences

This document is written for system administrators who are responsible for setting up and maintaining the call center configuration.

How to Use This Document

This document is a tutorial; it is designed to familiarize you with the type of applications you can build using Customer Assist Windows Administration and instructs you how to begin building them. The tutorial appears in the three chapters below:

- Chapter 3, ‘‘Tutorial: Building an Application’’, describes how to build an Auto Attendant.
- Chapter 4, ‘‘Tutorial: Dynamic Port Allocation’’, describes how to automatically allocate ports based on information from the DEFINITY switch.
- Chapter 5, ‘‘Tutorial: Callback Messaging’’, describes how to set up your system so callers can leave messages requesting agents to call them back.

If you are just starting off with Customer Assist Windows Administration, read Chapter 1, ‘‘Introduction’’, to familiarize yourself with the product. Use this document in conjunction with the on-line Help system and the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706.

Organization of This Document

This document is divided into eight chapters including the index.

- Chapter 1, ‘‘Introduction’’, provides an overview of Customer Assist Windows Administration and describes the applications you can create with it.
- Chapter 2, ‘‘Getting Started’’, describes how to install Customer Assist Windows Administration and introduces you to its modules as well as basic concepts.
- Chapter 3, ‘‘Tutorial: Building an Application’’, describes how to build an Auto Attendant.
- Chapter 4, ‘‘Tutorial: Dynamic Port Allocation’’, describes how to automatically allocate ports based on information from the DEFINITY switch.
- Chapter 5, ‘‘Tutorial: Callback Messaging’’, describes how to set up folders for Callback Messaging.
- Appendix A, ‘‘Windows Administration vs. UNIX Terminology’’, gives the UNIX and Customer Assist Windows Administration name for each vector action and for callback messaging.
- Appendix B, ‘‘Tutorial Examples’’, provides the completed tutorial examples.
- The index contains a detailed list of important terms along with the pages where they can be found.

Conventions

This section describes the terminology, typography, and symbols used in this document.

Terminology

- The word “enter” means to press the key or sequence of keys specified. For example, an instruction to enter the letter “y” is shown as

  Enter **y** to continue.

- 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].

- The word “select” means to click on the desired item. You may “select” a check box, a radio button, or an item in a Dropdown list box. For example, an instruction to select a radio button is shown as

  Select Recorded speech.

- 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 or third key or both) 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 PC, also known as soft keys, are represented as round boxes proceeded by the function or value of that key in capital letters. For example, an instruction to press function key 3 is shown as

  Press CHOICES (F3)

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

  Press [1] to record a message.

Typography

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

  Example 1:

  Enter **1** as the unique number and **Request extension** as the description.

- Terminology that is in the process of being defined appears in italics, as in the following example:

  Actions are instructions — commands — that perform a task.

Safety and Security Alert Labels

This document uses the following symbols to call your attention to helpful hints, potential problems that could cause loss of data or service interruptions.

NOTE:
Information in notes is helpful hints for using Customer Assist Windows Administration. Helpful hints may include basic theory or procedural shortcuts. Notes are indented from the main text.

CAUTION:
Indicates the presence of a hazard that if not avoided can or will damage your software or cause you to lose data.

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Related Resources

Use the list below to find reference materials that offer more information on subjects covered in this document.

- *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706

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Introduction

1

This chapter describes the intent of this document and then introduces you to Customer Assist as well as the applications you can build with it.

Intent of Document

This document is designed as a tutorial; it is not a reference manual. It is designed to help you install the software and familiarize you with the type of applications you can build using Customer Assist Windows Administration. The tutorial walks you through the steps involved in creating Customer Assist applications.

Detailed information regarding the individual actions can be found in the on-line Help system (See “Help Menu” on page 5 for more information) or the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706.

What is Customer Assist?

Customer Assist is software that runs on the CONVERSANT. With it, you can build applications to handle inbound calls and provide your callers with automated services that enable them to make call-handling decisions.

Customer Assist provides an administrative interface that enables you to tailor the software for the needs of your call center.

NOTE:
The interface is in English.

Customer Assist Applications

There are two types of applications you can build with Customer Assist:

- Self-service applications—These applications are typically considered "Interactive Voice Response (IVR)" services. They run automatically around the clock without agent assistance. In offering them, you are allowing your callers to serve themselves at the time of their choosing.
- Call enhancement applications—These applications are typically considered "Computer Telephony Integration (CTI)" services. They allow callers to identify the services they want. They can establish the identity of the caller to provide input for screen pop or enable different treatments for different types of callers. These applications can inform callers of their wait time and provide alternatives to waiting on hold.

Self-Service Application

Self-service applications allow your callers to access the information and services they need without speaking to an agent. They include:

- Voice bulletin boards — These allow callers to access information without speaking to an agent. Callers navigate through menu and submenu choices to select the information they want to hear.
- Voice forms — These are an ordered series of questions, which Customer Assist presents to the caller. Because the voice form collects the caller's input in an ordered series of questions, the information is complete and sequential. Your agents transcribe the completed forms on a separate call when convenient for your Call Center, using the Customer Assist services.
- Surveys — These are a special category of voice form, it collects feedback from callers on products or services.

Call-Enhancement Applications

The Customer Assist applications designed to enhance the interaction between your callers and agents include:

- Automated Attendant — allows callers to navigate through menu and submenu choices to select the service they desire.
- Routing — tries to identify callers, determine their needs, and route them to the appropriate service based on one or more of the following: calling number (ANI), dialed number (DNIS), queue status, schedule status, caller identity and profile information, as well as caller responses to menu choices in an Automated Attendant.
- Announcements — include both standard and dynamic announcements, which provide information to callers who are in queue to make the wait more constructive and less burdensome.

- Callback messaging — allows the caller to leave a message for a return call; it can automatically deliver the message to an agent as well.
- Screen pop enhancement — screen pop requires coordinating functions on several processors in your environment. Customer Assist can be part of the solution. It can accept information from the switch as Touch Tones, which the switch delivers via a Converse with ACD action. It can use this information to establish an identity for screen pop. For example, Customer Assist can obtain the ANI from the switch and use it to retrieve an identifier, such as telephone number, social security number or account number. If the ANI is unavailable or not recognized, Customer Assist can prompt for the identifier. Customer Assist returns the identifier to the switch for the screen pop as Touch Tones via a Return Data to ACD action.

Customer Assist Environment

Customer Assist runs on the CONVERSANT. The CONVERSANT channels connect to the DEFINITY switch in a line side appearance. The public telephone network directs calls to the DEFINITY switch based on the number the caller dialed. The routing services on the DEFINITY switch direct calls to the CONVERSANT channels. Customer Assist on the CONVERSANT can provide the voice processing services or can invoke other CONVERSANT application services. Customer Assist transfers callers who need assistance to agents by flashook methods or in coordination with the DEFINITY switch vectors.

Some configurations may include Computer Telephony Integration services, which allow information about the call, such as ANI, DNIS or caller entered information, to pass among the DEFINITY switch, the CONVERSANT and Customer Assist. For some environments, the integration is by DTMF tones over the voice channel. In other environments, it is over a separate link, which does not carry voice traffic.

The system administrator can maintain the Customer Assist configuration from a Windows PC connected to the CONVERSANT via TCP/IP services.

Figure 1 shows a representative environment diagram.

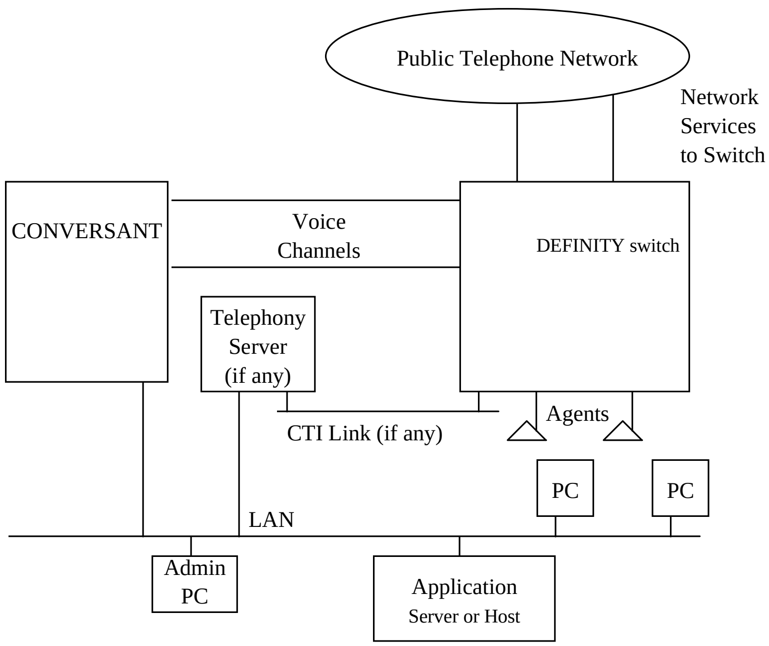


Figure 1. Customer Assist Environment

Administering Customer Assist: Windows Administration Versus Unix-based Administration

The CONVERSANT holds your active Customer Assist configuration, which handles incoming calls. You can maintain your active configuration through two separate interfaces:

- Customer Assist Windows Administration — serves as a scratch pad, where you create and change your Customer Assist applications. You retrieve configuration information from the CONVERSANT to your PC over the local area network, make your changes and additions on your PC, and then send the configuration back to the CONVERSANT. Changes you make on your PC do not affect calls, until you transfer them to the CONVERSANT.
- Customer Assist menu-based administration — allows you to administer your active configuration directly from your CONVERSANT console or a remote login.

Which Should I Use?

Which should you use? It is strongly recommended that you select the administrative interface that seems most friendly to you and use only that interface. Changing your Customer Assist configuration through multiple interfaces, particularly if multiple system administrators are making the changes, can result in conflicting changes.

Accessing Help

Use one of the three methods below to access the Help system:

- Select the Help Menu from the Main Window
- Click on the Help Icon
- Press HELP F1

Select the Help Menu from the Main Window to access general information about Customer Assist Windows Administration or to search for specific information. Click on the Help Icon to access context-sensitive help.

Help Menu

Access the Help Menu by selecting it from the Main Window. The Help system is divided into three categories:

- Help Topics — allows you to access general information about Customer Assist Windows Administration.
- Search — allows you to access specific information about a topic of your choice.
- Using Help — describes the procedures for using or customizing the Help system.

Context-Sensitive Help

Access context-sensitive help by pressing F1. Customer Assist Windows Administration displays a Help window for whatever is selected. For example, if you press F1 when an action is selected, Customer Assist Windows Administration displays the Help window for that action.

Summary

This chapter introduced you to Customer Assist Windows Administration and provided an overview of the product.

- See Chapter 2, ‘‘Getting Started’’, for instructions on how to install the software and an introduction to the four modules contained in Customer Assist Windows Administration.
- See Chapter 3, ‘‘Tutorial: Building an Application’’, for information on how to build an application using the Speech Administration, Custom Call Routing, and Vector Explorer modules.
- See Chapter 4, ‘‘Tutorial: Dynamic Port Allocation’’, for information on how to implement dynamic port allocation, which is the allocation of ports based on information from the DEFINITY switch.
- See Chapter 5, ‘‘Tutorial: Callback Messaging’’, for information on how to set up folders and forms for Callback Messaging.

Getting Started

2

Overview

This chapter describes the procedures for installing and navigating Customer Assist Windows Administration. It explains how to transfer your configuration information from the CONVERSANT to your PC and how to transfer your administrative changes back to the CONVERSANT. It also provides an overview of the main menu and the four Customer Assist Windows Administration modules below:

- Speech Administration
- Vector Explorer
- Custom Call Routing
- Callback Messaging

Installation Requirements

Customer Assist Windows Administration requires specific hardware and software on your system. Use the software and hardware lists below to insure that your system can handle Customer Assist Windows Administration.

Software Requirements

Customer Assist Windows Administration requires the following software packages:

- INTUITY CONVERSANT V7.0 (on the CONVERSANT)
- TCP/IP connectivity to administration PC (on both the CONVERSANT and the Windows PC)
- Customer Assist software (on the CONVERSANT)

Hardware Requirements

Customer Assist Windows Administration requires the following PC hardware:

- PC with a Pentium 133 MHz or higher processor
- One of the following operating systems:
  - Microsoft Windows 95 Operating System OSR1 or later
  - Microsoft Windows 98 Operating System
  - Microsoft Windows NT 4.0 Operating System with Service Pack 3 and above
- Mouse
- Super VGA resolution monitor
- RAM — 32 MBytes of RAM for Windows 95 and NT
- Hard-disk space — 40 MBytes
- TCP/IP connectivity to CONVERSANT

  Customer Assist Windows Administration requires you have a pre-existing IP connection to the CONVERSANT.

Installing Customer Assist

Use the steps below to install Customer Assist Windows Administration on your PC:

1. Insert the disk labeled Customer Assist Windows Administration Disk 1.
2. Select Run from the Windows Start Menu.
3. Enter **a:\Setup.exe** to install Customer Assist Windows Administration.

   The system prompts you through the installation process. Follow the instructions that appear on the screen.
4. Reboot your PC.

Starting Customer Assist Windows Administration

Use the steps below to access Customer Assist Windows Administration on Windows 95, Windows 98 or Windows NT when it is installed in the default directory:

1. Select Programs from the Windows Start Menu.
2. Select Lucent > Customer Assist > Customer Assist Main. (This path may be different if another directory was specified during installation).

   The system displays the Customer Assist Windows Administration main menu (Figure 2).

Figure 2. Customer Assist Windows Administration Main Menu

Customer Assist Windows Administration Modules

Customer Assist Windows Administration contains the main menu and four administration *modules*. Each *module* provides administration for a different Customer Assist service:

- Speech Administration
- Vector Explorer
- Custom Call Routing
- Callback Messaging

Speech Administration

Speech Administration allows you to define and record *phrases*, which are fragments of speech that the CONVERSANT uses to prompt callers for input or recite information to them. For example, you can use the Speech Administration module to create the following phrase, which prompts callers to enter their telephone number:

- “Please enter your telephone number”

This module allows you to define and record phrases; it does not activate them in your application. You must include the phrase in your application before the system recites a phrase. (You will learn more about defining and recording phrases in Chapter 3, ‘‘Tutorial: Building an Application’’.)

Vector Explorer

Vector Explorer allows you build your call logic using *actions*. Actions are instructions — commands — that perform a task. For example, an action can recite information to the caller or collect touch-tone input from the caller. You link actions together to create a *vector*, which is a series of actions that perform a function. For example, a vector can include actions that first collect information from the caller and then transfer the caller to an agent.

You can think of Vector Explorer as the glue for Customer Assist, because it allows you to integrate the configuration information entered in all four modules into a complete call script.

Custom Call Routing

Custom Call Routing allows you to create *tables* in which Customer Assist can look up information such as valid extension numbers or information about callers. You structure and organize the data within the table into *records*. A record is comprised of fields of related data. For example, you can create records that relate:

- The caller’s account number to the caller’s telephone number
- A caller’s area code to the agent group serving callers from that area code

Callback Messaging

Callback Messaging allows callers to leave a message for a return call. You use the Callback Messaging module to create *folders*, which hold the messages left by callers. You can make different folders for different types of callers. You configure one *form* for each folder. A form defines the prompts that Customer Assist uses to collect the message from the caller. When the caller completes the responses to the questions, Customer Assist Windows Administration saves the responses as a message in the folder that is associated with the form. Callback Messaging can automatically deliver the messages to agents, or agents can dial into the CONVERSANT to retrieve them.

PC Workspace vs. CONVERSANT

On your Windows PC, you make your changes and additions in a *workspace*. One workspace exists for each of the four modules. You perform the administration through the following steps:

1. On your PC, start the Customer Assist module in which you want to perform administration.

   When you start a Customer Assist Windows Administration module, the configuration you most recently saved with the Save command appears in the workspace.

2. Synchronize your PC workspace with the CONVERSANT.

   Use the Retrieve command to copy the CONVERSANT configuration to your PC workspace. The Retrieve Data dialog box appears. Select the module for which you want to retrieve configuration information from the CONVERSANT (Figure 3).

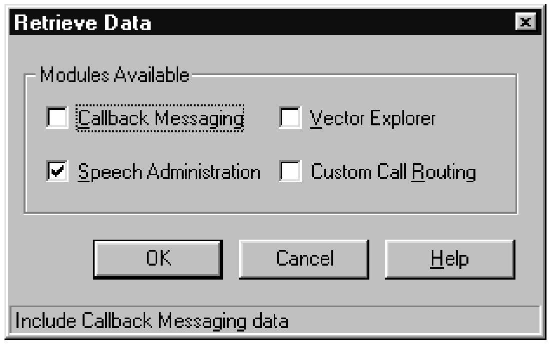


Figure 3. Retrieve Data Dialog Box

The Remote Login dialog box appears when you try to retrieve information from the CONVERSANT. Log in to the CONVERSANT (Figure 4).

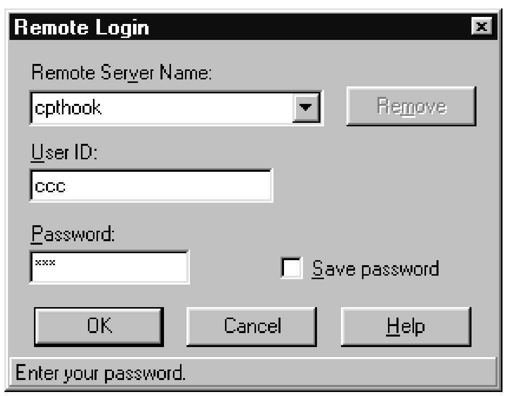


Figure 4. Remote Login Dialog Box

Alternatively, use the Restore command to bring a configuration that you saved previously in a PC directory into the workspace. The information you Retrieve and Restore varies for each of the modules. Read the module specific sections below for details.

3. Make your changes and additions in the workspace.

   If you wish to make the current configuration the one that will appear next time you start the module, use the Save command to bring the saved workspace configuration into your PC workspace. To backup your configuration in one of your PC directories, use the Backup command.

4. Copy your new configuration to the CONVERSANT.

   When you complete your changes and additions, send a copy of the configuration to the CONVERSANT with the Send command. Like the Retrieve command, the Send command operates differently for each module. Read the module specific sections below for details.

Synchronization for Speech

Figure 5 illustrates the Speech Administration module commands for copying configurations to and from the PC workspace.

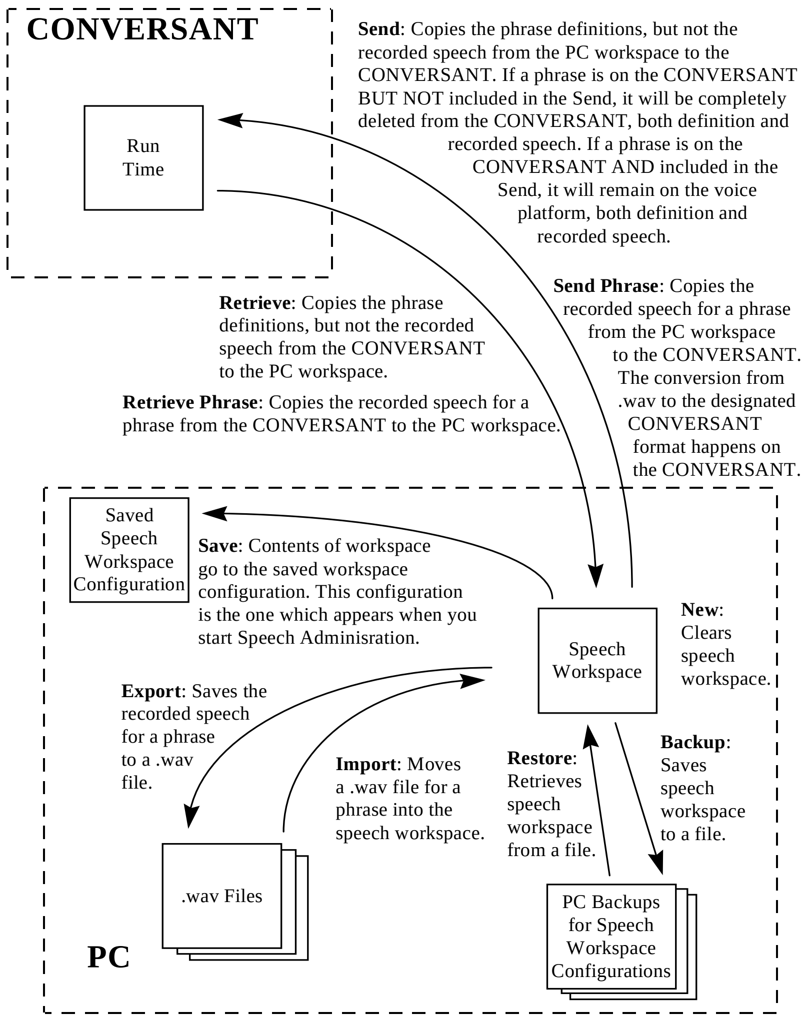


Figure 5. Synchronization for the Speech Administration module

Table 1 describes how the commands for copying configurations to and from the Speech Administration PC workspace operate as well as the cautions associated with them.

Table 1. Speech Administration Commands

Command	**Function**	**CAUTIONS**
Retrieve	Copies the following from the CONVERSANT to the PC workspace: ■ phrase definitions ■ phrase text (if any)	Each Retrieve command overwrites the configuration that existed in your PC workspace before the Retrieve.
Send	Copies the following from the PC workspace to the CONVERSANT: ■ phrase definitions ■ phrase text (if any) It DOES NOT copy the recorded speech. If a phrase is on the CONVERSANT BUT NOT included in the Send, it will be completely deleted from the CONVERSANT (both the definition and the recorded speech) If a phrase is on the CONVERSANT AND included in the Send, it will remain on the CONVERSANT (both the definition and the recorded speech).	If you did not synchronize your workspace with the CONVERSANT by performing a Retrieve at the start of this administration session, you risk deleting phrase definitions, text and recorded speech from the CONVERSANT. See ‘‘Synchronization for Speech’’ on page 14 for more information.
Save	Causes the Speech Administration module to retain a copy of the current workspace, including phrase definitions, text, and recorded speech (if any). This copy appears the next time you start this module.	Each Save command overwrites the copy from the previous Save command.
New	Clears your PC workspace.	
Backup	Copies your PC workspace, including phrase definitions, text, and recorded speech (if any), to the file you specify.	

Continued on next page

Table 1. Speech Administration Commands — *Continued*

Command	Function	CAUTIONS
Restore	Copies the following Speech Administration configuration information into your PC workspace from the file you specify: ■ phrase definitions ■ text ■ recorded speech (if any)	The Restore command overwrites the configuration that was in your PC workspace before the Restore.
Export	Copies the recorded speech from a phrase in your PC workspace to a file you specify in .wav format	
Import	Copies a .wav file you specify (it must be accessible from your PC) into the workspace as recorded speech for a phrase you specify	
Send Phrase	Copies the phrase that you specify, including the phrase definition, text, and recorded speech (if any), from your PC workspace to the CONVERSANT	
Retrieve Phrase	Copies the recorded speech for the phrase that you specify from the CONVERSANT to the PC workspace	

Warning Messages for Speech

This section describes the warning message that can appear when you select the Send command.

If phrases exist on the CONVERSANT that are not in the copy of the PC workspace you are sending, the system displays the following error message:

```
WARNING: The following phrases were previously defined
on the CTI Server, but were not included in the
workspace you just sent. If you continue, the following
phrases and their recorded speech will be deleted.
```

The system displays a warning list, which shows the phrases that will be deleted from the CONVERSANT if you continue with the Send command.

```
Do you wish to continue?
```

If this warning message appears, use the steps below:

1. Examine the phrases and do one of the following:
   - If the list includes phrases you do not want to delete, follow the instructions in ‘‘Canceling a Speech Administration Send Command’’ on page 17 below.
   - If the list includes only those phrases you want to delete, go to Step 2.
2. Select “Yes” to install the phrases and their definitions on the CONVERSANT.

   Customer Assist deletes the phrases that appeared in the warning list from the CONVERSANT, including the phrase definitions and any recorded speech for the phrase. It installs the phrase definitions included in the Send on the CONVERSANT. If a phrase included in the Send already exists on the CONVERSANT, it will remain on the CONVERSANT with its recorded speech, if any, after the Send.

Canceling a Speech Administration Send Command

To avoid deleting one or more of the phrases in the CONVERSANT warning list, use the steps below:

1. Select “No” to cancel the Send command.
2. Use the Export command to copy the recorded speech to a .wav file, one per phrase, for each phrase, for which you have created newly recorded speech during the administrative session.
3. Select the Retrieve command to make a copy of the speech configuration that is on the CONVERSANT and transfer it to your PC workspace.

   This step synchronizes your PC workspace with the CONVERSANT for the Speech Administration module.
4. Make any changes or additions to the phrase definitions and text.
5. Use the Send command to transfer a copy of the speech configuration from your PC workspace to the CONVERSANT.
6. Use the Import command for those phrases for which you exported recorded speech in Step 2 to copy the recorded speech from the .wav file back into the PC workspace.
7. Use the Send Phrase command to transfer a copy of each phrase you created in Step 5 from your PC workspace to the CONVERSANT.

Synchronization for Vectors

Customer Assist has three CONVERSANT databases for the Vector Explorer module:

- Run time database—this database stores the vector configuration that Customer Assist uses for call processing
- Development database—this database stores the vector configuration in which new changes appear before they are placed in service for call processing.
- Archive database—this database stores previous run time vector configurations.

NOTE:
These three databases are relevant only to the Vector Explorer configurations and affect only the Vector Explorer module. You can copy only the development database from the CONVERSANT to your PC workspace; you cannot copy the runtime nor the archive databases to your PC workspace.

Figure 6 illustrates the Vector Explorer module commands for copying configurations to and from the PC workspace.

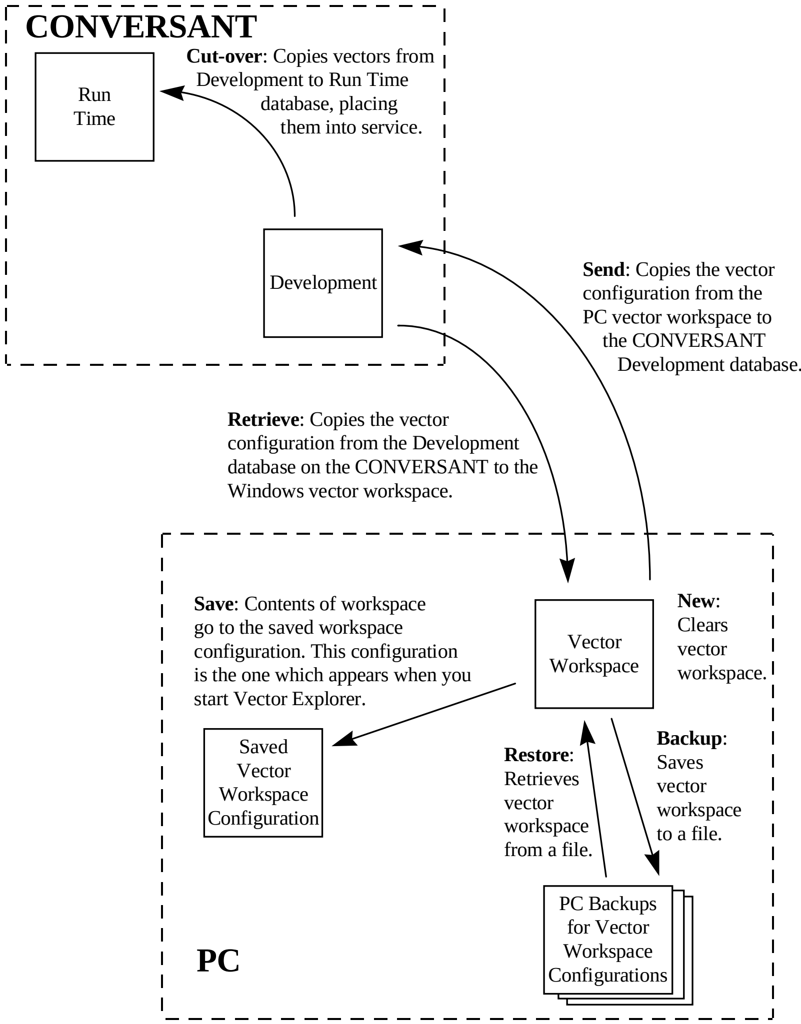


Figure 6. Synchronization for the Vector Explorer Module

Table 2 describes how the commands for copying to and from the Vector Explorer PC workspace operate as well as the cautions associated with them.

Table 2. Vector Explorer Commands

Command	Function	CAUTIONS
Retrieve	Copies the vector configuration from the CONVERSANT development database to the Vector Explorer PC workspace.	Each Retrieve command overwrites the configuration that existed in your PC workspace before the Retrieve.
Send	Copies the vector configuration from the PC workspace to the CONVERSANT development database.	The Send command does not put the vector configuration into service; it copies the vector configuration to the development database, not the run-time database. See the Cutover command for more information about placing vectors in service.
Save	Causes the Vector Explorer module to retain a copy of the current vector workspace. This copy appears the next time you start this module.	Each Save command overwrites the copy from the previous Save command.
New	Clears your PC workspace.	
Backup	Copies your PC workspace to the file you specify.	
Restore	Copies into your PC workspace the contents of a vector configuration file, which you designate.	The Restore command overwrites the configuration that was in your PC workspace before the Restore.
Cutover	Copies the vector configuration from the development database on the CONVERSANT to the run-time database on the CONVERSANT. This places the configuration in service.	

Warning Messages for Vector Explorer

When you select the Send command, Customer Assist copies your PC workspace to the development database on your CONVERSANT. Because Customer Assist copies to the development database instead of the runtime database, Customer Assist Windows Administration displays no warning messages for the Vector Explorer Send command.

Synchronization for Callback Messaging

Customer Assist has only one configuration database for callback messaging. Customer Assist uses it for call processing.

Figure 7 illustrates the Callback Messaging module commands for copying configurations to and from the PC workspace.

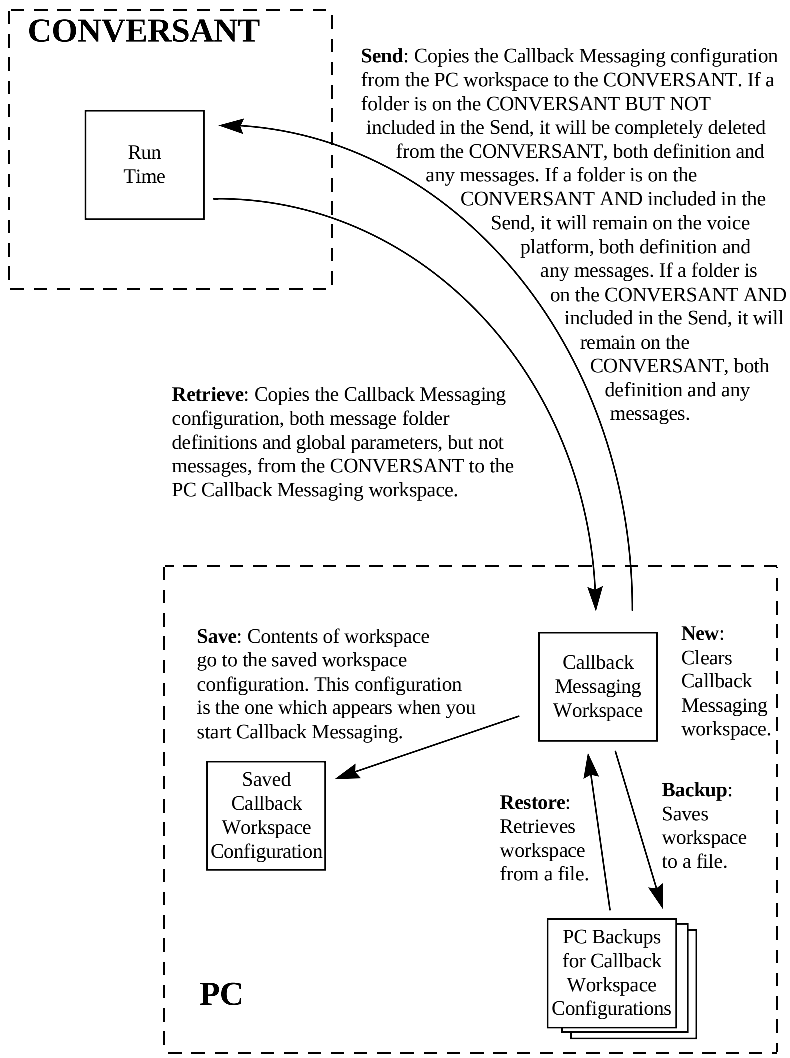


Figure 7. Synchronization for the Callback Messaging Module

Table 3 describes how the commands for copying to and from the Callback Messaging PC workspace operate as well as the cautions associated with them.

Table 3. Callback Messaging Commands

Command	Function	CAUTIONS
Retrieve	Copies the following from the CONVERSANT to the PC workspace: ■ Callback messaging configurations It DOES NOT copy the messages.	Each Retrieve command overwrites the configuration that existed in your PC workspace before the Retrieve.
Send	Copies the following from the PC workspace to the CONVERSANT: ■ Callback messaging configuration It DOES NOT copy the messages. If a folder is on the CONVERSANT BUT NOT included in the Send, it will be completely deleted from the CONVERSANT (both the definition and the messages) If a folder is on the CONVERSANT AND included in the Send, it will remain on the CONVERSANT (both the definition and the messages).	Each Send command overwrites the configuration that existed on the CONVERSANT before the Send.
Save	Causes the Callback Messaging module to retain a copy of the current workspace. This copy appears the next time you start this module.	Each Save command overwrites the copy from the previous Save command.
New	Clears your PC workspace.	
Backup	Copies your PC workspace to the file you specify.	
Restore	Copies the contents of the specified Callback Messaging configuration file into the current workspace.	The Restore command overwrites the configuration that was in your PC workspace before the Restore.

Warning Messages for Callback Messaging

This section describes the warning messages that can appear when you select the Send command.

If folders exist on the CONVERSANT that are not in the copy of the PC workspace you are sending, the system displays the following error message:

```
“WARNING: The following folders were previously defined
on the CTI Server, but were not included in the
workspace you just sent. If you continue, the following
folders and the messages in the folder will be
deleted.”
```

The system displays a warning list, which shows the folders that will be deleted from the CONVERSANT if you continue with the Send command.

```
Do you wish to continue?
```

If this warning message appears, use the steps below:

1. Examine the folders and do one of the following:
   - If the list includes folders you do not want to delete, select “No” to terminate the Send. After terminating the Send, execute a Retrieve to synchronize your PC workspace with the CONVERSANT. Then, perform the required administration and send the new configuration information to the CONVERSANT.
   - If the list includes only those folders you want to delete, go to Step 2.
2. Select “Yes” to install the callback messaging configuration on the CONVERSANT.

   Customer Assist deletes the folders from the CONVERSANT (including the messages they contain) that existed on the CONVERSANT but were not included in your PC workspace. It installs the callback messaging configuration on the CONVERSANT. If a folder included in the Send already exists on the CONVERSANT, it will remain on the CONVERSANT, including its messages, if any, after the Send.

Synchronization for Custom Call Routing Tables

Figure 8 illustrates the Custom Call Routing module commands for copying configurations to and from the PC workspace.

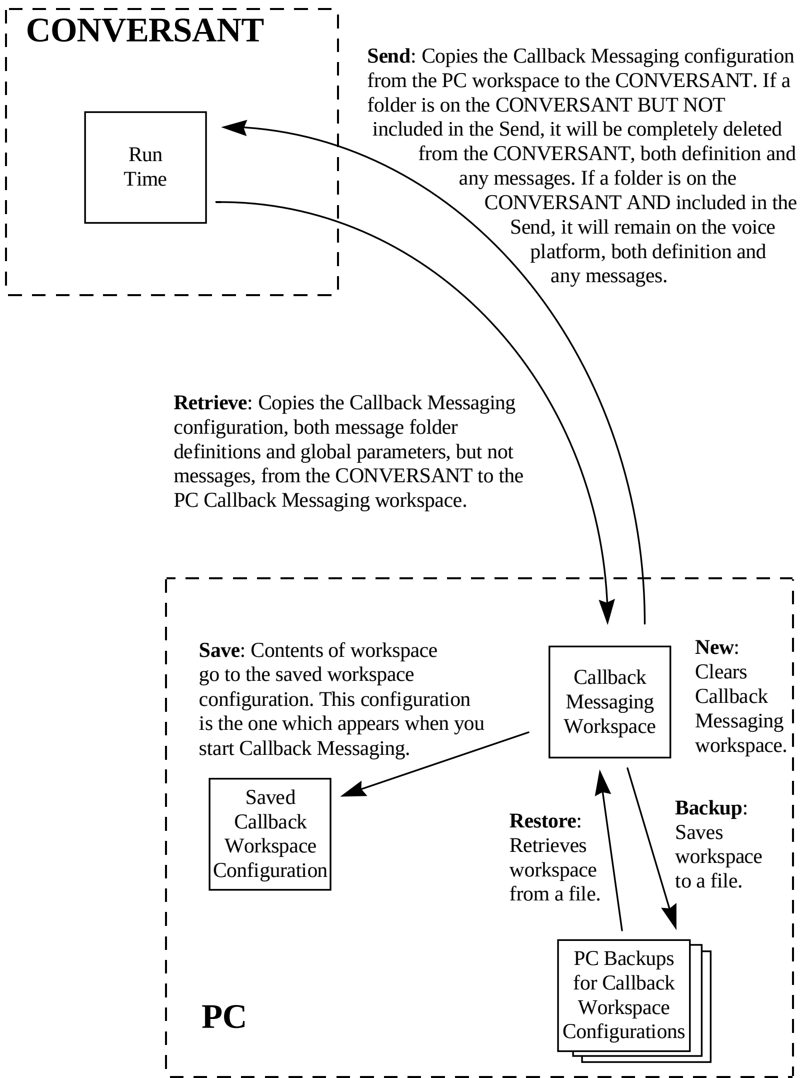


Figure 8. Synchronization for the Custom Call Routing Module

Table 4 describes how the commands for copying to and from the Custom Call Routing PC workspace operate as well as the cautions associated with them.

Table 4. Custom Call Routing Commands

Command	Function	CAUTIONS
Retrieve	Copies the following from the CONVERSANT to the Custom Call Routing workspace on your PC: ■ table definitions ■ table contents Retrieves only the table(s) you specify in the selection list; it does not retrieve the entire Custom Call Routing configuration. Because it copies (or retrieves) both the table and its contents to your PC workspace, use this command with large tables only when necessary due to significant transfer time.	
Send	Copies the following from the PC workspace to the CONVERSANT: ■ table definitions ■ table contents This command will DELETE the table contents under the following conditions: ■ Send overwrites the contents of the table if it existed on the CONVERSANT before the Send This command sends only the specified table(s); it does not send the entire Custom Call Routing configuration. Because it copies (or sends) both the table and its contents to the CONVERSANT, use this command with large tables only when necessary due to significant transfer time.	
Save	Causes the Custom Call Routing module to retain a copy of the current workspace (table definitions and contents). This copy appears the next time you start this module.	Each Save command overwrites the copy from the previous Save command.

Continued on next page

Table 4. Custom Call Routing Commands — *Continued*

Command	Function	CAUTIONS
New	Clears your PC workspace.	
Backup	Copies your PC workspace, including the table definitions and contents, to the file you specify.	
Restore	Copies the contents of a Custom Call Routing configuration file, including the table definitions and contents, into your PC workspace.	The Restore command overwrites the configuration that was in your PC workspace before the Restore.
Export	Copies the contents of the table in your PC workspace to a designated file in .txt format.	
Import	Copies the contents of the .txt file you specify into the designated table.	

Warning Messages for Custom Call Routing

When you select the Send command, Customer Assist copies the table definition and its contents from the PC workspace to the CONVERSANT. If the table(s) exists on the CONVERSANT prior to the Send, Customer Assist completely replaces it with the copy from the PC workspace. Because the Send command affects only the designated table and no other tables on the CONVERSANT, Customer Assist Windows Administration displays no warning messages for the Custom Call Routing Send.

Summary

While working through this chapter, you learned about each of the modules in Customer Assist and Windows Administration, and how to navigate the system. You also learned which workspace is your active workspace and how to avoid overwriting it as well as how to use the Help system to better understand Customer Assist Windows Administration.

- Chapter 3, ''Tutorial: Building an Application'', describes how to build an application using the Speech Administration, Custom Call Routing, and Vector Explorer modules.
- Chapter 4, ''Tutorial: Dynamic Port Allocation'', describes how to implement dynamic port allocation, which is the allocation of ports based on information from the DEFINITY switch.
- Chapter 5, ''Tutorial: Callback Messaging'', describes how to set up folders and forms for Callback Messaging.

Tutorial: Building an Application

3

Overview

This chapter shows you how to build an application using the Speech Administration, Custom Call Routing, and Vector Explorer modules.

Tutorial Example: The Rock Coast Products Automated Attendant

Rock Coast Products has a CONVERSANT system with 12 voice channels. Rock Coast Products wants you to design an Automated Attendant application for calls to their general number. When a general office call arrives, the General Office Automated Attendant must answer, determine whether the time is during normal business hours and operate as follows:

- Did the call arrive during normal business hours? Normal business hours are the times an operator is on-duty, Monday through Friday from 7:30 am to 5:30 pm. If yes, Customer Assist should recite a menu that allows callers to transfer to different departments, transfer to the operator, or enter the extension number to which to transfer.
- Did the call arrive outside normal business hours? Outside normal business hours are the times an operator is not on-duty, such as holidays and times before or after normal business hours. If yes, Customer Assist should recite the normal business hours and then offer the caller the option to enter an extension number or to call back during business hours.

Rock Coast Products extension numbers have the form **7nnn**. The departments and their extensions are as follows:

Purchasing	7010
Human Resources	7011
Accounting Services	7012
Operator	7000

For callers who enter an extension number, Rock Coast Products wants to restrict transfers to certain extensions.

Basic Application Development Steps

Use the steps below to build an application:

1. Define the application by identifying all the services it must perform.
2. Collect the information that must reside in tables. For example, a list of the telephone extensions that are valid for transfers or a mapping of telephone numbers or account numbers to agent group numbers for routing.
3. Draw a callflow identifying the call script logic and the phrases that the caller should hear. See ‘‘Create the Callflow’’ on page 32 for the General Office Automated Attendant callflow.
4. Define the phrases that the caller should hear and record them using the Speech Administration module. See ‘‘Phrase Definitions and Phrase Recordings’’ on page 35 for the procedures for defining and recording phrases.
5. Create the callback messaging configurations that the application requires.

   NOTE:
   The General Office Automated Attendant does not require callback messaging configurations. This step applies to the Help Desk Automated Attendant that is created in Chapter 5, ‘‘Tutorial: Callback Messaging’’.

6. Build the tables that the application requires using the Custom Call Routing Module. ‘‘Define the Tables in Custom Call Routing’’ on page 43 uses the table of extensions for the General Office Automated Attendant as an example.
7. Create the call script in Vector Explorer using the procedure in ‘‘Build the Call Script in Vector Explorer’’ on page 46.
8. Place the application into service using the procedure in ‘‘Synchronization for Vectors’’ on page 18.
9. Test the application and make corrections as needed. Place test calls to follow all the logical paths of your callflow.

Create the Callflow

Draw the callflow to illustrate the two features below:

- Every logical step in the call script
- Each phrase that a caller might hear in its full wording

The callflows for the General Office Automated Attendant (Figure 9 and Figure 10) illustrate the call script, the phrase numbers, and the vector numbers for the vectors that deliver the call script functions. (See the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706, for a description of callflows and instructions on how to create them.)

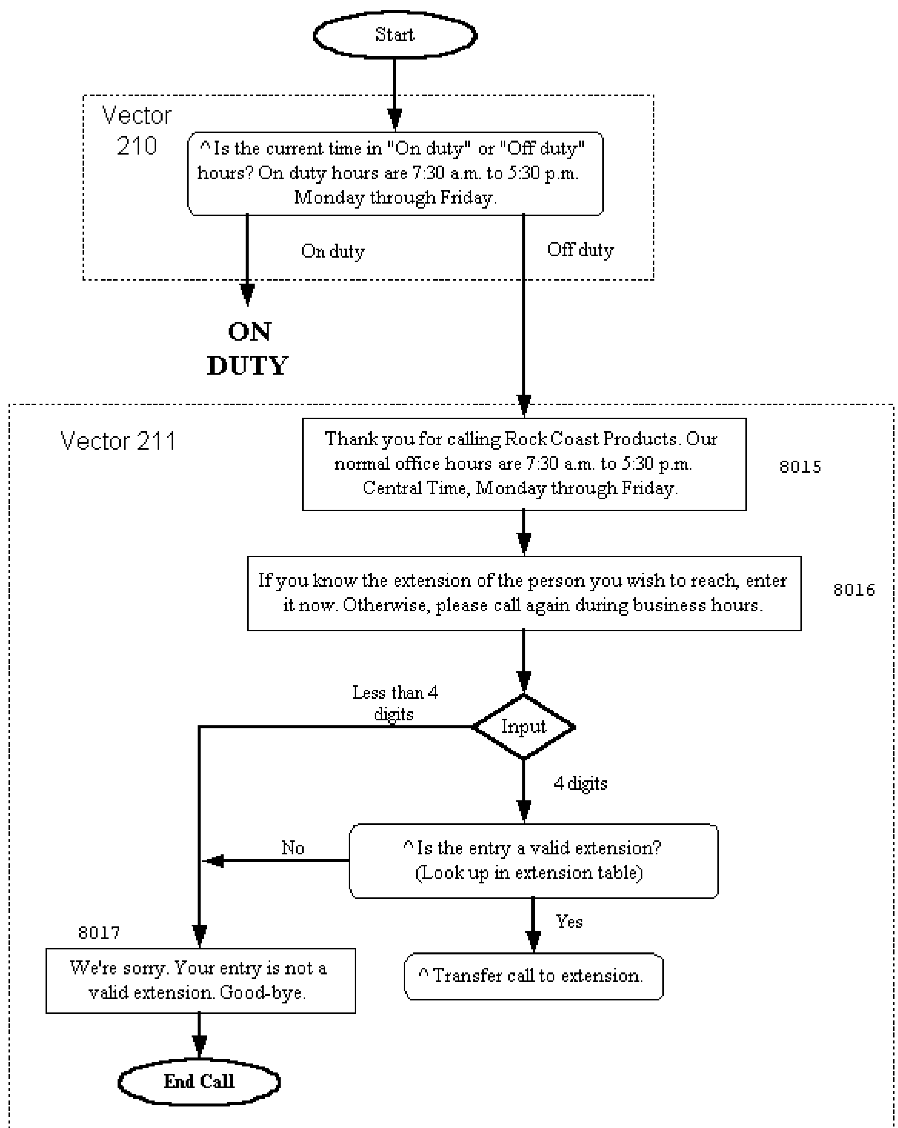


Figure 9. Auto Attendant Callflow, Vector 210 and 211

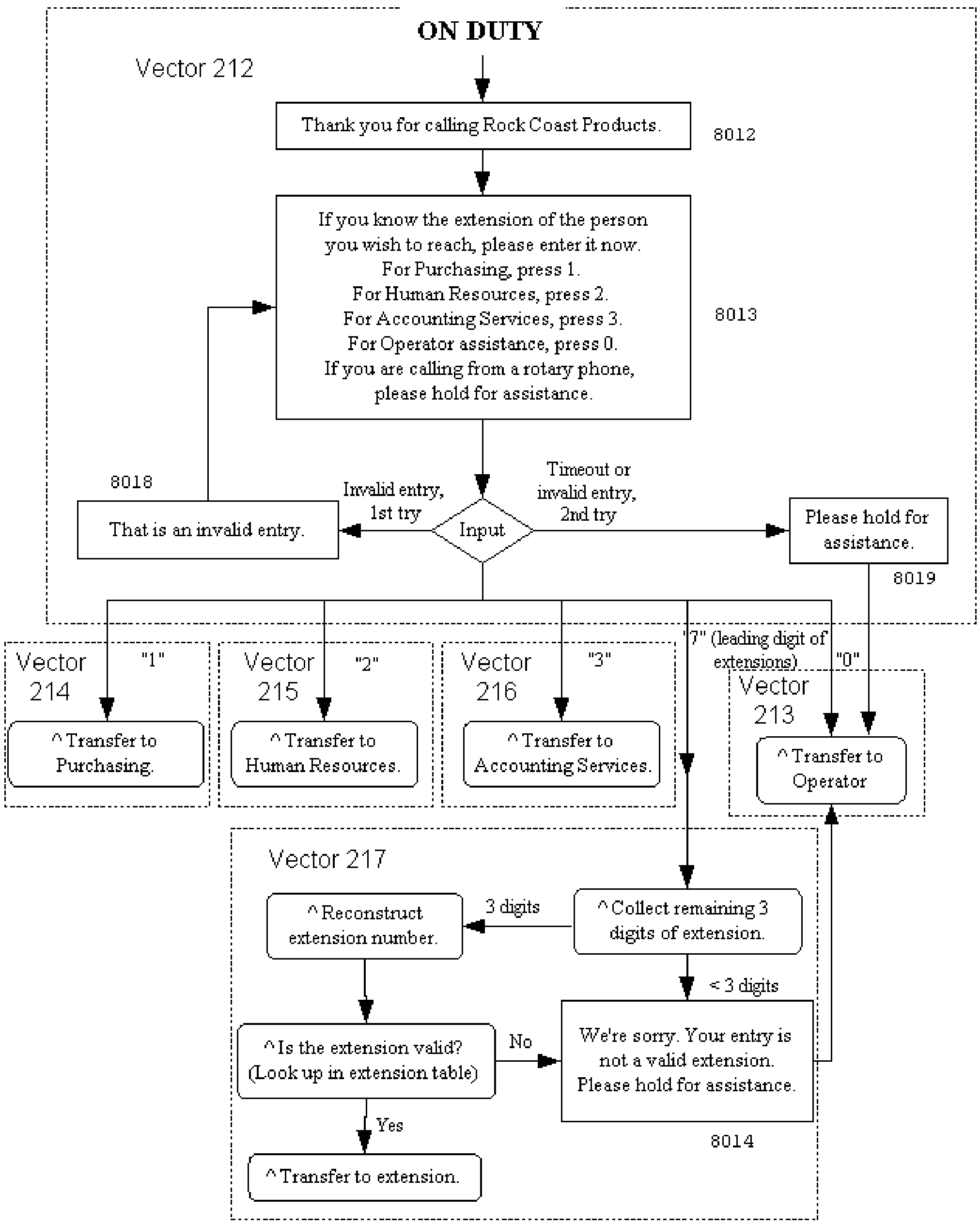


Figure 10. Auto Attendant Callflow, Vector 212 through 217

Phrase Definitions and Phrase Recordings

After you finish drawing the callflow, create the speech, or *phrases*, for the application. As you learned in Chapter 2, ‘‘Getting Started’’, *phrases* are the fragments (sentences) of recorded speech Customer Assist uses to recite information to the caller or prompt the caller for input.

Each phrase is a member of a *talkfile*, which is a grouping of phrases based on language, gender, and phrase type. There are four phrase types:

- Vector phrases—The phrases you create for a call script, except for the phrases within a voice form or a callback message.
- Form phrases—The phrases you create to prompt the caller for entries within a voice form or a callback message.
- Standard Speech phrases—The number and letter phrases that Customer Assist uses to recite the value of a variable with the “Announce Value of Variable” action.
- Form Standard Speech phrases—The standard phrases that Customer Assist uses in a voice form or callback message to prompt the caller to confirm input or to select a schedule option for callback. Customer Assist also uses these phrases to prompt the agent during transcription.

Each *talkfile* has a talkfile number identifier. For example, talkfile 6104 is the vector phrase talkfile for US English in a female voice. See Chapter A, ‘‘Maximum Values in Customer Assist Packages’’ of the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706, for a list of the talkfiles.

Each Customer Assist installation has a base language. The call script defaults to this language, unless you include actions to change the language with a Change Language action.

Defining a Phrase

WARNING:

Before you define any phrases through the Speech Administration module, perform a Retrieve action to synchronize your PC workspace with the Customer Assist speech database on the CONVERSANT. See "Synchronization for Speech" on page 14 for a description of steps to take to perform synchronization. Failure to synchronize can result in loss of speech on the CONVERSANT.

Defining a phrase is different from recording a phrase. When you define a phrase, you do not record speech; you only create a definition for the phrase. You define a phrase by giving it a phrase number, which must be unique within the talkfile, and a phrase description to help identify it. You can also enter the text you want to record to prepare a script to read when recording. Once you create a phrase definition, you can use the phrase in your Vector Explorer actions or Callback Messaging forms. However, you cannot place the applications into service until you record speech for the phrases, because Customer Assist cannot speak the phrases until then.

Each phrase illustrated in Figure 9 and Figure 10 has a phrase number next to it. Start by defining the following phrase which the call script uses as the greeting during normal business hours:

> "Thank you for calling Rock Coast Products. Our normal office hours are 7:30 a.m. to 5:30 p.m. Central Time, Monday through Friday."

As illustrated in the callflow, use 8015 for the phrase number; use "Our normal office hours are..." for the phrase description. Use the steps below to define the phrase:

1. If you have not already done so, start the Customer Assist Speech Administration module on your PC.
2. Synchronize your PC workspace for the Speech Administration module with the CONVERSANT. See "Synchronization for Speech" on page 14 for the synchronization procedure. You need to perform these steps only once for an administrative session.
3. Select the Add command button from the bottom of the dialog box.

   The system displays the Add Phrase dialog box. Figure 11 illustrates how this dialog box should appear when completed.

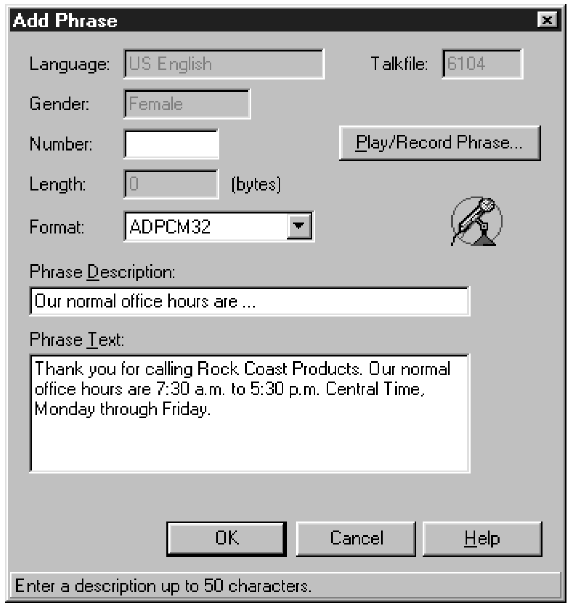


Figure 11. Add Phrase Dialog Box

4. Enter **8015** in the `Number` field to assign a unique number to this phrase.
5. Enter **Our normal office hours are...** in the `Phrase Description:` field to help identity this phrase.
6. Enter the phrase that appears at the start of this section in the `Phrase Text:` field.

   As you learned in "Phrase Definitions and Phrase Recordings" on page 35, Customer Assist prepares a phrase list, or script, you can read off when recording. The text you enter here will be included in the phrase list.
7. Repeat Steps 1 through 4 for each phrase in the callflow. The phrases in the Rock Coast Products callflows (Figure 9 and Figure 10) are numbered from 8012 through 8019.
8. When you have made all the phrase definitions you intend to make for the administrative session, copy the changes to the CONVERSANT with a Send command.

Recording Speech

Now that you have defined your phrases, you must *record* them; that is, create the recorded speech that the Announce or Announce Menu Collect Input require to recite speech. Recorded speech resides on the CONVERSANT in digital format. Customer Assist provides two methods for recording phrases:

- Recording phrases on your PC and then transferring them to the CONVERSANT
- Recording phrases directly on the CONVERSANT

Use the steps below to record them on your PC (See the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706, for instructions on how to record them directly on the CONVERSANT):

1. In the main window, highlight the phrase number and select Play/Record. For this example, highlight phrase number 8015.

   The system displays the Play/Record Phrase dialog box (Figure 12). The actual text for the phrase appears in the Phrase text box. Read from this text box when recording or, alternatively, generate a phrase list, which displays the text for each phrase. (See the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706, for instructions on how to generate a phrase list).

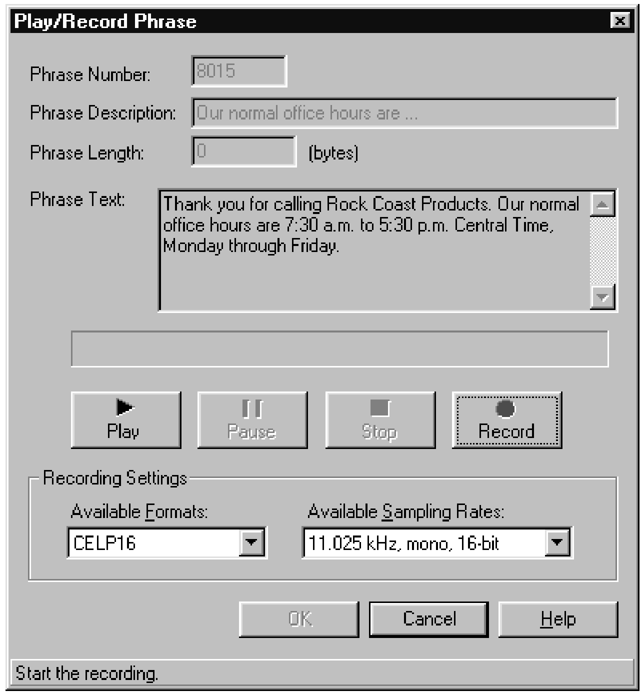


Figure 12. Play/Record Phrase Dialog Box

2. Set the format to the appropriate recording level. (See the on-line Help system or the *INTUITY CONVERSANT System Customer Assist User Guide*, 585-313-706, for more information.)
3. Click Record to begin recording speech, and Stop when you have finished.
4. Click Play to listen to the phrase you recorded.

   The recorded speech is now on your PC in digital format.
5. Click OK.

Installing a Recorded Phrase

You install a recorded speech by sending it to the CONVERSANT where Customer Assist converts it from .wav format to the format you specify. Use the steps below to send the recorded speech to the CONVERSANT where Vector Explorer and Callback Messaging can use it:

1. Select the phrase you want to send to the CONVERSANT by clicking on it.

   To send more than one phrase, hold down CONTROL and click on each phrase you want to send.

   CAUTION:
   See "Synchronization for Speech" on page 14 for the conditions under which Customer Assist will delete recorded phrases from the CONVERSANT.

2. Click on the Send Phrase button in the main Speech Administration window.

Determining Phrase Status

How can you determine the status of a phrase? Use the four indicators below, which appear in the main Speech Administration window phrase list, to determine the status of a phrase:

- Microphone icon—See Table 5.
- `Installed` field—See Table 5.
- `Local` field—If "Y," the phrase has recorded speech in the PC workspace. If "N," the phrase does not have recorded speech in the PC workspace.
- `Format` field—If the phrase has recorded speech on the CONVERSANT and no new speech is recorded for the phrase in the PC workspace, then this field displays the format of the recorded speech that is on the CONVERSANT. If the phrase has new recorded speech on the PC workspace, then this field displays the format the recorded speech will have when sent to the CONVERSANT.

Table 5 describes how to use the microphone icon and the `Installed` field to determine the status of a phrase.

Table 5. Determining Phrase Status

Icon	Installed field	Description
Clear	Y	Phrase is defined and has recorded speech on the CONVERSANT; it does not have newly recorded speech in the PC workspace.
Not clear	Y	Phrase is defined on the CONVERSANT but does not have recorded speech on the CONVERSANT.
Clear	N	One of the following: ■ The phrase is not defined on the CONVERSANT but has recorded speech in the PC workspace ■ The phrase is defined on the CONVERSANT, but new speech is recorded for the phrase in the PC workspace
Not Clear	N	Phrase is not defined on the CONVERSANT and does not have recorded speech in the PC workspace.

Figure 13 illustrates determining phrase status based on the microphone icon and the `Installed` field value.

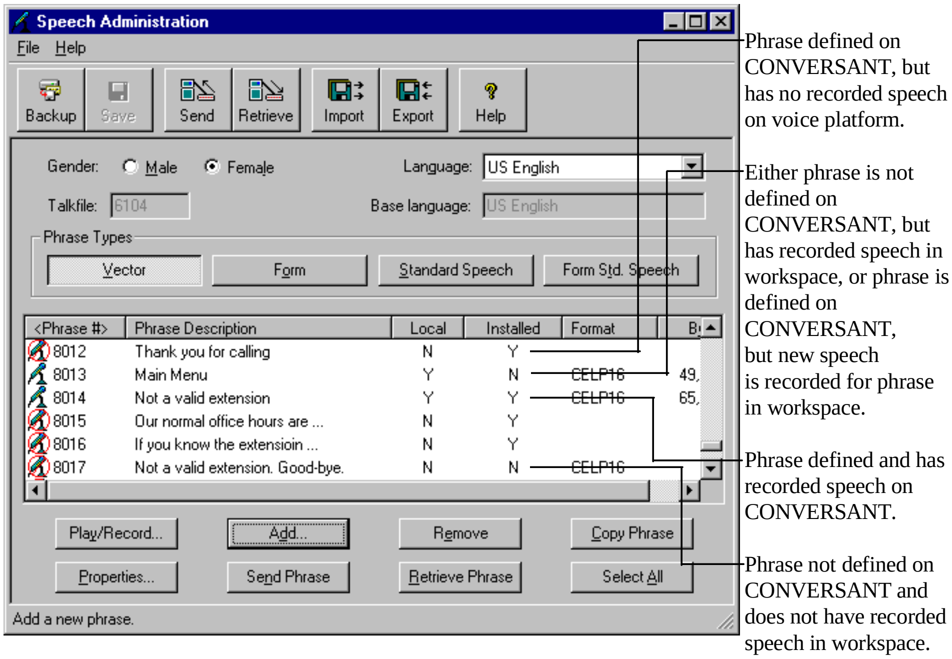


Figure 13. Phrase Status

Define the Tables in Custom Call Routing

Rock Coast Products wants to restrict callers to transferring only to certain extension numbers. To enforce this restriction, place the list of extension numbers in a table using the Custom Call Routing module. Then in the call script include a vector with a Lookup Record action, which checks whether the caller's extension entry is in the table.

Understanding Tables and Their Fields

Each Customer Assist table has a unique name and, optionally, a description. A table is comprised of records and fields. Records appear in the table rows and the fields of information within each record appear in the table columns. Each Customer Assist table holds records with the following fields:

- `Lookup` field — Customer Assist compares this field in each record to the Look-up value specified in the Lookup Record action to determine whether they match.

  For example, each `Lookup` field in the Rock Coast Products table of telephone extensions contains an extension number. The Look Up Record action in the Rock Coast Automated Attendant call script compares the extension number entered by the caller to every `Lookup` field in the Rock Coast Products table. If it finds a match, it determines the caller has entered an acceptable extension number.

- `Data Field 1` field — This field holds information needed for call processing or administration, but not for retrieving records. For the Rock Coast Products Valid Extensions table, this field might contain the name of the person at the extension.
- `Data Field 2` field — This field also holds information needed for call processing or administration, but not for retrieving records. For the Rock Coast Products Valid Extensions table, this field might be empty.

NOTE:
Customer Assist requires information in the `Lookup` field, but not in the `Data Field 1` or `Data Field 2` fields.

Adding Tables

Use the steps below to add a routing table:

1. Start at the main Custom Call Routing module window and select New from the command buttons.

   The system displays the New Routing Table dialog box. Figure 14 illustrates how this dialog box should appear when completed for the Rock Coast Products Valid Extensions table.

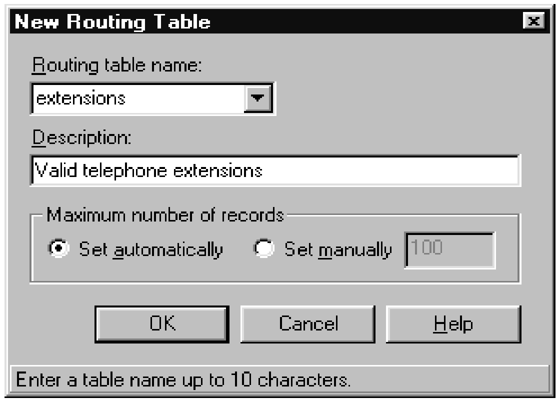


Figure 14. New Routing Table Dialog Box

2. Enter **extensions** in the Routing table name dropdown list box to give your table a unique name.

   The dropdown list box displays the names of existing routing tables; you cannot use these names. These names are for reference only.

3. Enter **Valid telephone extensions** in the `Description:` field to help identify the purpose of this routing table.

4. Check one of the two radio buttons to specify the total number of records Customer Assist should allow.

   Customer Assist defaults to 100 for the maximum number of records.

5. Click OK.

Adding Records

You can add records to a table by importing them from an existing text file or by entering them through the Custom Call Routing module. Use the steps below to add your first record to the Rock Coast Products Valid Extensions table:

1. Highlight the name of the table you want to edit.

2. Click the New command button that is to the right of the Extensions content table.

   The system displays the New Record dialog box. Figure 15 illustrates how this dialog box should appear when completed.

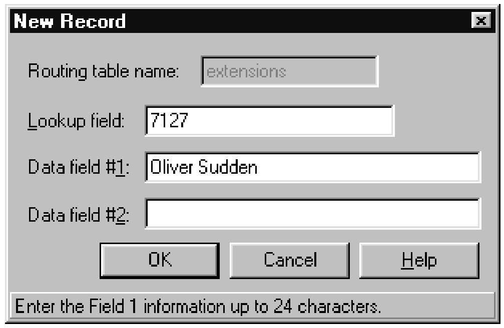


Figure 15. New Record Dialog Box

3. Enter a valid extension number in the `Lookup` field.

   Customer Assist uses the `Lookup` field to identify the record. For this example, enter **7127**, which instructs Customer Assist that 7127 is a valid extension number.

4. Insert the name of the person associated with this extension number in the `Data Field 1` field.

5. Because you will not associate any additional data with this extension number, leave the `Data Field 2` field blank. (See INTUITY CONVERSANT System Customer Assist User Guide, 585-313-706, for more information on the purpose of these fields.)

See Chapter 2, ‘‘Getting Started’’, for more information on copying information from your workspace PC to the CONVERSANT.

Build the Call Script in Vector Explorer

Now that you have defined the phrases for the Automated Attendant and built the "extensions" table, you are ready to create the Rock Coast Products Automated Attendant call script. Use actions and vectors in the Vector Explorer module.

Actions and Vectors

Actions are the building blocks for Customer Assist call scripts. For example, use the Announce action to recite a phrase, the Answer Call action to take the voice channel off hook, or the Transfer Call action to transfer the call from the voice channel to another number. Customer Assist groups the actions into the five categories below:

- Speak & Collect actions — To recite phrases and collect input from callers.

  There are eight Speak & Collect actions defined in Vector Explorer. They are Announce, Announce Conditionally, Announce Menu & Collect Input, Announce Value of Variable, Change Language, Collect Rotary Input, Collect Speech Rec Input and Collect Touch-Tone Input.

- Call Control actions — To control the sequence of the call script.

  There are eight Call Control actions defined in Vector Explorer. They are Answer Call, Assign Channels, Branch, Branch at Time/Date, Conduct After Call Activity, Go To, Stop Application and Transfer Call.

- CTI (Computer Telephony Integration) Links actions — To pass information between the DEFINITY switch and the CONVERSANT.

  There are eight CTI Link actions defined in Vector Explorer. They are Calculate Delay Time, Converse with ACD (retrieves dynamic information from the switch), Return Data to ACD (returns information to the switch or ACD), Adjust Expected Wait Time, Get ANI and DNIS Information, Get Queue Information, Write Call Information, and Retrieve Call Information.

- Application Links actions — To pass control to application services, such as speech administration and message transcription.

  There are five Application Link actions defined in Vector Explorer. They are Complete Message Form, Start Speech Administration, Start Application, Start Application Conditionally and Transcribe Message Forms.

- Variable Values actions — To set the value of variables and to look up records in tables.

NOTE:
A *variable* is an identifier, to which a Customer Assist call script can assign a value. The call script can modify the value, evaluate the value or use it as a parameter in an action, for example, as an extension number for a transfer. Customer Assist provides 17 predefined variables and allows you to define up to 25 additional variables. Select Variable Administration in the File menu or click on the Variable button in the tool bar, to enter variable administration and the variable “Help” information.

To the right of the main Vector Explorer window are tabs for each of the five action groupings (Figure 16). Click on a tab and the icons for the actions in the group appear across the bottom of the vector detail view in the main Vector Explorer window. Place the cursor on an icon, and the tool tip displays the name of the action. See the on-line Help system for more information on configuring the actions.

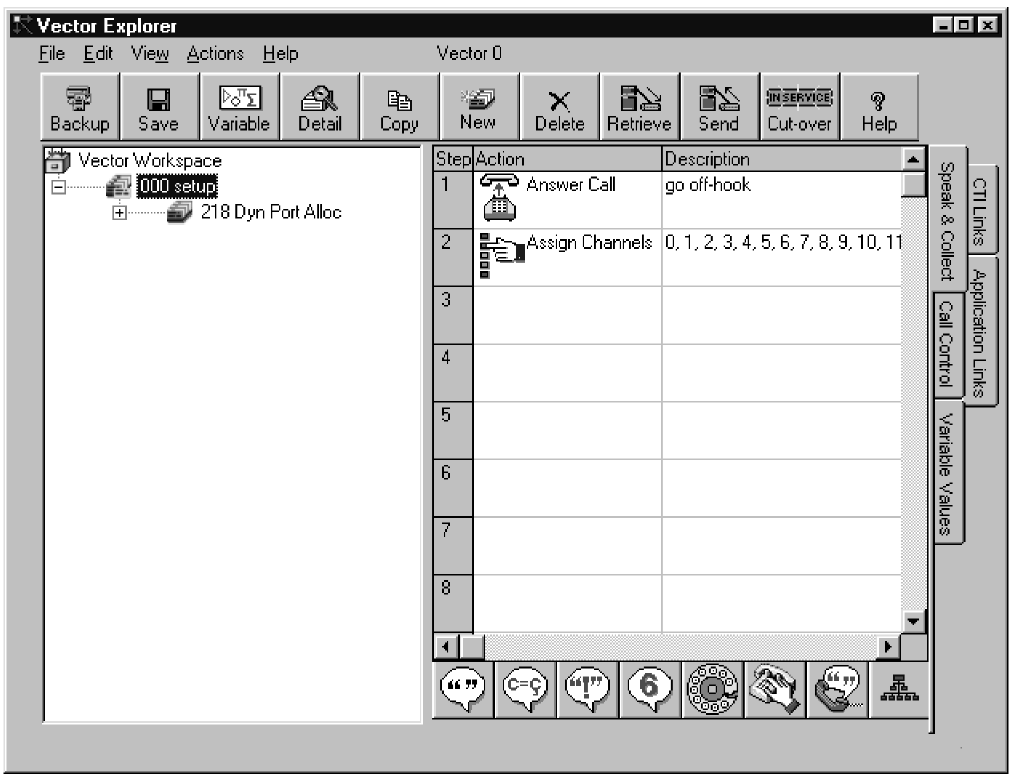


Figure 16. Vector Explorer Main Window (Setup Vector)

Vectors are groupings of actions to perform a task within a call script. A vector can include up to 14 actions. Each vector has an identification number from 000 through 255 and a description.

Set Up Vector

WARNING:

Before you administer your vectors through the Vector Explorer module, perform a Retrieve action to synchronize your PC workspace with the Customer Assist vector configuration on the CONVERSANT. See *"Synchronization for Vectors" on page 18* *for a description of steps to take to perform synchronization. Failure to synchronize can result in loss of the vector configuration on the CONVERSANT.*

All Customer Assist configurations include vector 000, the Set Up vector (Figure 16). When a call comes in to a voice channel with Customer Assist assigned to it, the Set Up vector begins call processing with the actions below:

- Answer Call — This action takes the voice channel off hook.
- Assign Channel — For each action that has Customer Assist assigned to it, this action determines which vector Customer Assist activates when a call arrives at the voice channel.

Initial Rock Coast Products Automated Attendant Vector

The Rock Coast Products Automated Attendant begins by determining whether the call has arrived during normal business hours when an operator is available:

> "Is the current time in the "On-duty" or "Off-duty" hours? On-duty hours are 7:30 a.m. to 5:30 p.m. from Monday through Friday."

Use the following steps to define a new vector for this function with vector number 210 and vector name Gen Office AA:

1. Click on the New icon to begin creating a new vector.

   The system displays the New Vector dialog box. Figure 17 illustrates how this dialog box should appear when completed.

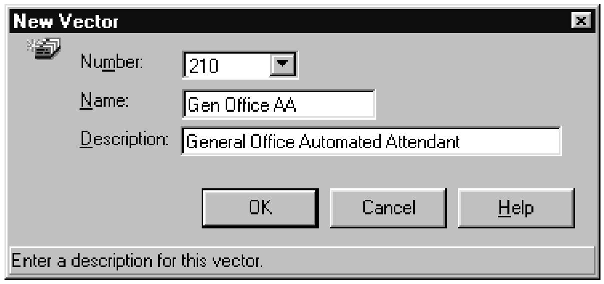


Figure 17. New Vector Dialog Box

2. Enter **210** in the `Number` field to assign a unique number to this vector.
3. Enter **Gen Office AA** in the `Name` field.
4. Enter **General Office Automated Attendant** in the `Description` field.
5. Click OK.

The Rock Coast Products Gen Office AA vector requires the two actions below:

- Branch at Time/Date — This action determines where a call arrival time falls within a schedule and directs the call script accordingly. (See "Branch at Time/Date Action" on page 50 for more information on this action.)
- Stop Application — This action ends the call script.

NOTE:
Always include a Stop Application action as the last step in every vector, to ensure that, if preceding steps malfunction, the call script terminates and the voice channel goes back on hook.

To insert an action into a vector, click on the tab for the action grouping at the right side of the main Vector Explorer window. When the action icon appears at the bottom of the window, click to select it and then place the cursor in the appropriate step in the action list.

Branch at Time/Date Action

The Branch at Time/Date action compares the current date and time to a list of mappings. Each mapping associates a time period with a vector. The action starts at the top of the list and works down the list, checking whether the current time falls within the time period of the mapping. If so, it moves the script to the vector in the mapping. Figure 19 shows the Branch at Time/Date mappings for the Rock Coast Automated Attendant.

In the Branch at Time/Date window, add a mapping as follows:

- To add a new mapping at the end of the list, click on the Add button.
- To insert a new mapping into the list, highlight the position where you want the new mapping and click on the Insert button. The new mapping is inserted after the highlighted position.

When you insert or add a mapping, the system displays the Schedule Event Properties window (Figure 18). The `Hour`, `Minute`, `Day`, `Month` and `Year` field entries determine the starting date and time for the mapping time period. The `Ending at` field displays the ending time for the period.

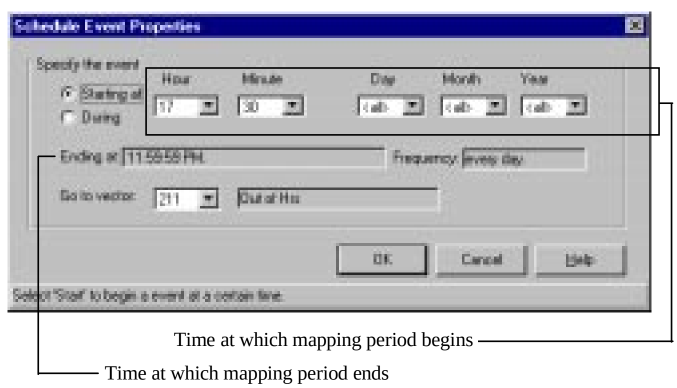


Figure 18. Schedule Event Properties Window

Use the steps below to configure your Branch at Time/Date mappings:

1. Create mappings for the holidays when agents are not on-duty and all hours are considered “off-duty” hours.

   Using the “During” mapping mode, create one mapping for each holiday. Set the `Hour` and `Minute` fields to **<all>**, and the `Day`, `Month` and `Year` fields to the date of the holiday. Set the `Go to vector` field to the off-duty vector. Figure 3-11 shows that the first seven mappings for the General Office Automated Attendant are holiday mappings.

2. Create mappings for days of the week, during which all hours are "off-duty" hours.

   Using the "During" mapping mode, create one mapping for each day of the week that has no "on-duty" hours. Set the `Hour` and `Minute` fields to **<all>**, the `Day` field to the day of the week, and the `Month` and `Year` fields to **<all>**. Set the `Go to vector` field to the off-duty vector. In Figure 3-11 the eighth and ninth mappings are for Sunday and Saturday, when Rock Coast has no operator on duty for the general office number.

3. Create mappings to handle calls that arrive on days with on-duty hours, but after the on-duty period has passed.

   In step 1, you created mappings to handle calls during holidays. In step 2, you created mappings to handle calls during days without "on-duty" hours. Now you must create a mapping to handle calls that arrive on days with "on-duty" hours, but after the "on-duty" hours have passed. Using the "Starting at" mapping mode, create a mapping with the `Hour` and `Minute` fields set to the time when "on-duty" hours end and the `Day`, `Month` and `Year` fields set to **<all>**. Set the `Go to vector` field to the off-duty vector. For example, at Rock Coast, operator service for the general office number ends at 5:30 pm. The mapping in Figure 3-11, which uses the "Starting at" mapping mode and has `Hour` 17, `Minute` 30 and `Day`, `Month` and `Year` <all>, handles calls that arrive after operator services end.

4. Create a mapping with a time period that begins at the start of the "on-duty" hours and continues to the end of the day.

   This mapping handles only those calls that arrive during the "on-duty" hours, even though the mapping runs through the end of the day. This is because the mapping you created in Step 3 will handle all calls that arrive after "on-duty" hours end, before they reach this mapping. Using the "Starting at" mapping mode, set the `Hour` and `Minute` fields to the time when the "on-duty" hours start and the `Day`, `Month` and `Year` fields set to **<all>**. Set the `Go to vector` field to the on-duty vector. For example, at Rock Coast, operator service for the general office number begins at 7:30 am. The mapping in Figure 3-11, which uses the "Starting at" mapping mode and `Hour` 07, `Minute` 30 and `Day`, `Month` and `Year` <all>, handles calls that arrive during on-duty hours.

5. Create a mapping to handle calls that arrive at all other times.

   Using the "During" mapping mode, create one mapping with the `Hour`, `Minute`, `Day`, `Month` and `Year` fields set to **<all>**. Set the `Go to vector` field to the off-duty vector.

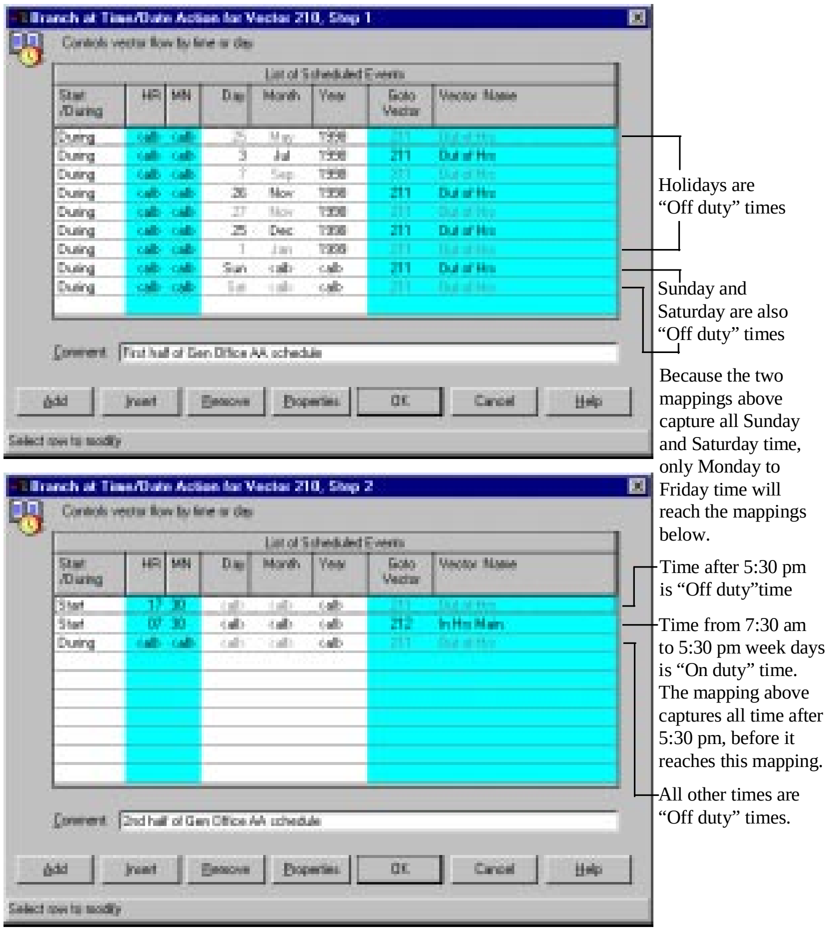


Figure 19. Branch at Time/Date Window

Configuring for Your Specific Needs

Use the list below to determine how to configure the Branch at Time/Date action for your special needs:

- How would the mappings change if all the days had different “on-duty” hours?

  Apply Steps 3 and 4 in ‘‘Branch at Time/Date Action’’ on page 50 to each day of the week with “on-duty” hours. Start with the latest day in the week with “on-duty” hours and progress sequentially to the earliest day in the week with “on-duty” hours.

- Each Branch at Time/Date action holds up to 10 mappings. What if you need more than 10 mappings?

  If your schedule requires more than ten mappings, then use additional Branch at Time/Date actions in your vector. If the current date and time do not fall into any of the mapping periods in a Branch at Time/Date action, then Customer Assist continues to the next action in the vector.

Office Hours Main Menu Vector

During normal business hours the Automated Attendant goes to the greeting and main menu. The “In Hours Main Menu” vector 212 provides this function. To accomplish these tasks, insert the following three actions into vector 212:

- Announce — This action recites a phrase. In the case of the Office Hours Main Menu vector, it recites the greeting.
- Announce Menu & Collect Input — This action prompts the caller for an entry, collects the input, verifies it is valid, and moves the call script based on the input. (See ‘‘Announce Menu & Collect Input Action’’ on page 53 for more information on this action.)
- Stop Application — This action ends the call script.

Announce Menu & Collect Input Action

The Announce Menu & Collect Input action prompts callers for information and collects their input. After comparing their input to a list of valid inputs, the action operates as follows:

- If the input is not valid, the action provides error handling.
- If the input is valid, the action can assign a value to a variable corresponding to the input and move the call script to a specified vector corresponding to the input.

The Announce Menu & Collect Input action configuration requires entries in three administration windows: the Prompting, Normal Cases and Special Cases windows.

Prompting Window

This window allows you to define the prompt phrase and how the action collects input from the caller. The list below describes the input required for each field in the Prompting window:

- `Talkfile number` — Enter the talkfile number for the prompt phrase in this field.
- `Phrase desc` — Enter a description of the phrase in this field.
- `Allow Interrupt` – Select yes or no to allow or not allow interrupt.
- `Number of digits to collect` — Enter the minimum and maximum number of digits the action should accept from the caller as a valid response.
- `Time to wait for input (sec)` — Enter the time in seconds the action should wait for the caller to respond with the first digit and succeeding digits, if any, before considering the caller's response in error as too slow.
- `Place caller input in` — Enter the variable into which the action should place the caller's response.

Normal Cases Window

The Normal Cases window holds the list of valid entries and for each valid entry defines the logic the action should take, if the caller makes that entry.

- `Have caller confirm input` — Select Yes if you want the action to speak the caller's entry back for confirmation.
- `Store output value in` — Enter a variable name in this field. If you have a value for a valid input in the `Output Value` field and the caller enters the valid input, then the action assigns the `Output Value` field value to the `Store output value in` variable.

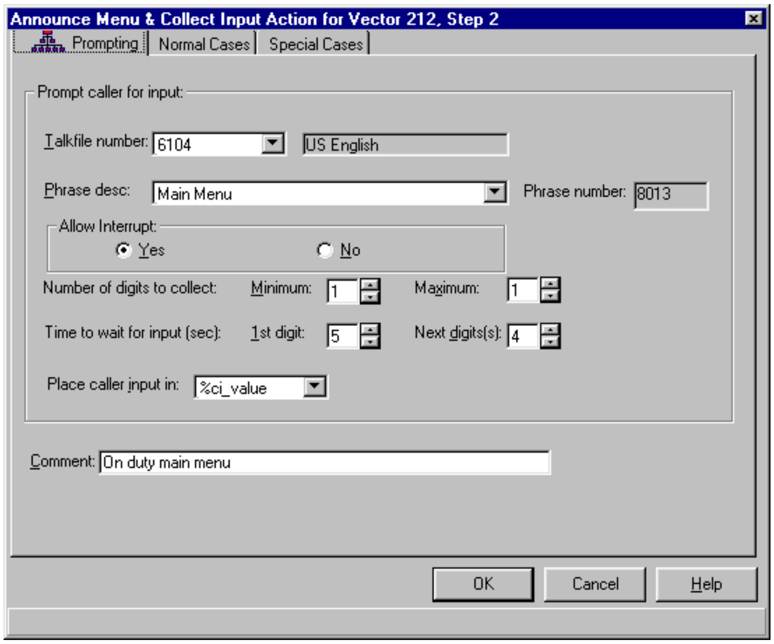
It also includes a table with a row for each valid inputs with entries, as follows:

- `Valid Input` — Enter the valid responses to the prompt in this column. See the on-line Help system for the action for details on different ways to specify valid formats.
- `Output Value` — If the action should assign a value to the `Store output value in` variable in response to a valid input, then enter the value in the `Output Value` field in the row for the input.
- `Go To Vector` and `Vector Name` — If the action should move the call script to a vector in response to a valid input, then enter the vector number and name in the `Go To Vector` and `Vector Name` fields in the row for the input. Enter `CONT` in the `Go To Vector` field if the call script should continue to the next action in the vector sequence in response to the valid input.

Special Cases Window

Special cases allow the Announce Menu & Collect Input action to handle unexpected responses, errors and no replies. See the on-line Help system for the action for information on the entries, which this window requires.

Figure 20 shows the Prompting and Normal Cases windows for the General Office Automated Attendant On-duty Main Menu.



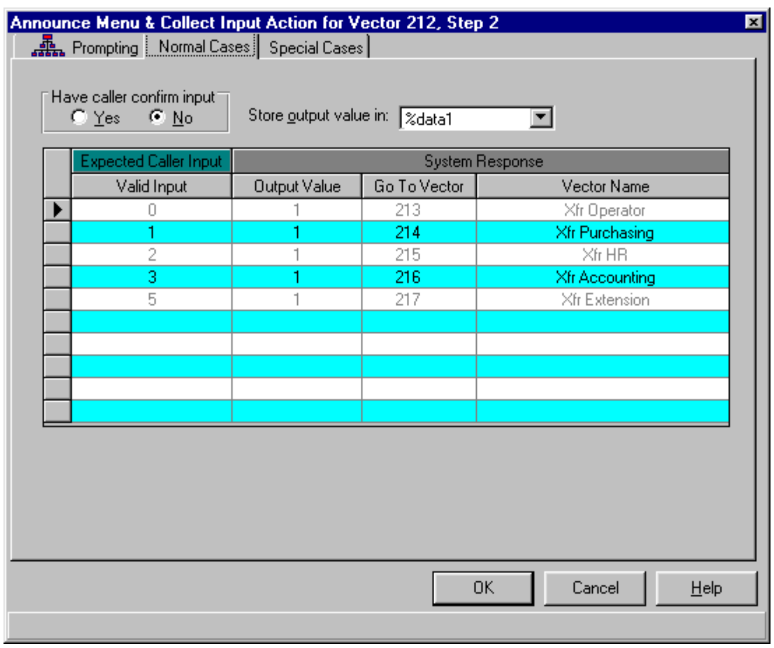


Figure 20. Prompting and Normal Cases Windows

Summary

While working through this chapter, you learned how to record speech and create the routing table as well as the vectors required to build an Auto Attendant.

- See Chapter 4, ‘‘Tutorial: Dynamic Port Allocation’’, for information on how to implement dynamic port allocation, which is the allocation of ports based on information from the DEFINITY switch.
- See Chapter 5, ‘‘Tutorial: Callback Messaging’’, for information on how to set up folders and forms for callback messaging.
- See Appendix B, ‘‘Tutorial Examples’’, for a complete listing of the vectors and actions for the General Office Automated Attendant.

Tutorial: Dynamic Port Allocation

4

Overview

This chapter provides a tutorial that describes how to implement dynamic port allocation.

Tutorial

When Rock Coast Products first put their CONVERSANT into production, the CONVERSANT provided only the General Office Automated Attendant. Eventually, Rock Coast Products added these applications:

- Help Desk Automated Attendant — A Customer Assist application with callback messaging. Chapter 5, ‘‘Tutorial: Callback Messaging’’, describes this automated attendant.
- sales_support — A custom application that enables their sales representatives and distributors to retrieve commission and other sales related information.
- customer_inquiry — A custom application that enables their customers to check order and warranty status.

Now Rock Coast Products wants to use the CONVERSANT ports more efficiently through dynamic port allocation; that is, it wants to dynamically assign service to calls based on the number dialed by the caller or, more accurately, the DNIS digits for the number. The DNIS digits for the four applications are as follows:

Service	Service Type	DNIS Digits
General Office Automated Attendant	Customer Assist	7101
Help Desk Automated Attendant	Customer Assist	7102
sales_support	Custom Application	7103
customer_inquiry	Custom Application	7104

The Rock Coast Products DEFINITY switch passes the DNIS digits to the CONVERSANT by DTMF (Dual Tone Multi Frequency) tones over the voice channel at the start of the call just before connecting the caller.

Building the Call Script for Dynamic Port Allocation

This section describes how to create the Dynamic Port Allocation vector and modify the Set Up vector for dynamic port allocation.

Dynamic Port Allocation Vector

Use the steps below to create the Dynamic Port Allocation vector:

1. Create a Dynamic Port Allocation vector using the New command in the Vector Explorer tool bar.

   The Dynamic Port Allocation vector for Rock Coast Products has the number 218 and the name Dyn Port Alloc.

2. In Step 1 of the Dynamic Port Allocation vector, enter an action to retrieve the DNIS digits from the switch and place them in a variable (typically %dnis or %vdn).

   The action used for this procedure depends on the Computer Telephony Integration between the DEFINITY switch and the CONVERSANT for DNIS information. It will be one of the following:

   - Converse with ACD — use this action if the DEFINITY switch is a Lucent Technologies DEFINITY G3 and passes the digits via a Converse vector action. In this case, the DEFINITY switch may pass the Vector Directory Number instead of DNIS digits. The Rock Coast Products DEFINITY switch uses this method. Figure 21 shows the completed Converse with ACD window for Rock Coast Products.

   - Collect Touch Tone Input — use this action if the switch passes the digits in band as DTMF tones at the start of the call.

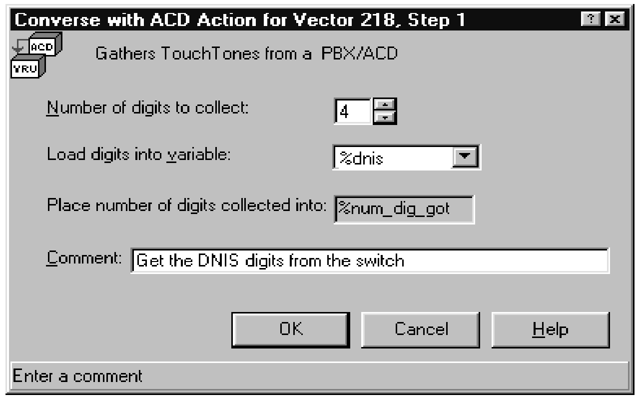


Figure 21. Converse with ACD Action Window

3. To include non-Customer Assist applications in the dynamic port allocation, proceed as follows:

   a. Insert a Start Application Conditionally action into Step 2 of the Dynamic Port Allocation vector.

   b. Enter the variable into which the action in Step 1 placed the DNIS digits in the `Variable to evaluate` field.

   c. Create one row in the Start Application Conditionally window for each non-Customer Assist application.

   d. Enter the DNIS digits for the application in the `Value` field.

   e. Enter the name of the application as it appears on the CONVERSANT in the `Program` field.

   The Start Application Conditionally action compares the `Value to evaluate` field entry to the `Value` field entries. When it finds a match, it starts the application that appears in the `Program` field of the row with the match. If it does not find a match, it ends, and Customer Assist moves to the next action in the vector.

   If your system includes more than ten non-Customer Assist applications, include additional Start Application Conditionally actions until you have enough rows for all the non-Customer Assist applications. Figure 22 shows the Start Application Conditionally window for the Dynamic Port Allocation vector step 2.

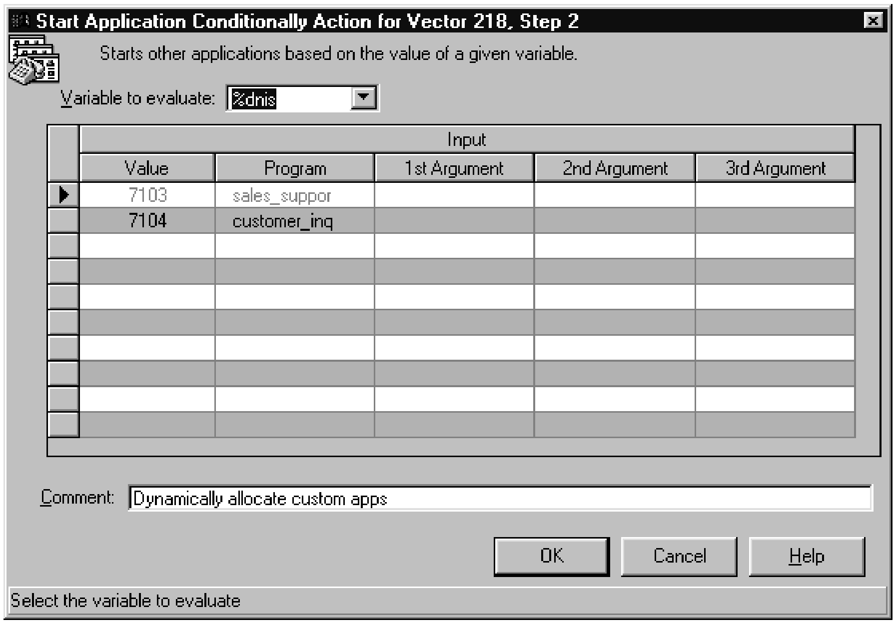


Figure 22. Start Application Conditionally Window

4. To include Customer Assist in the dynamic port allocation, proceed as follows:

   a. Insert a Branch action into the next step in the Dynamic Port Allocation vector.

   b. Enter the variable into which the Step 1 action placed the DNIS digits into the `Variable to evaluate` field.

   c. Create one row in the Branch window for each Customer Assist service or application.

   d. Enter the DNIS digits for the application in the `Value` field.

   e. Enter the number of the vector that initiates Customer Assist service in the `Go To Vector` field.

   The Branch action operates similarly to the Start Application Conditionally action. Figure 23 shows the Branch window for the Dynamic Port Allocation vector step 2.

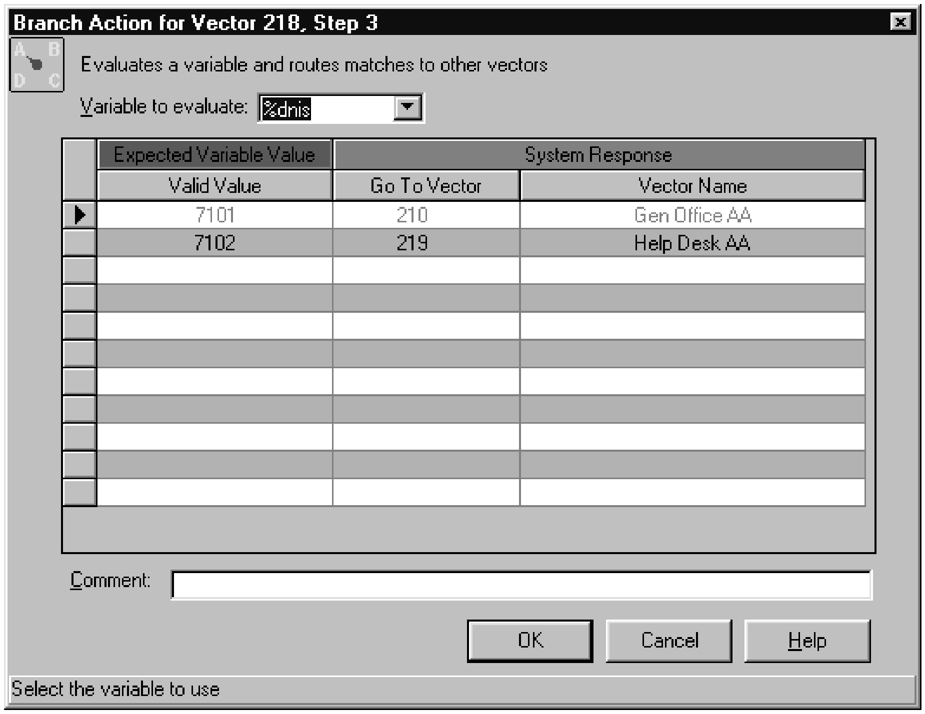


Figure 23. Branch Window

5. Add a Stop Application action to conclude the Dynamic Port Allocation vector.

   Figure 24 shows the Vector Explorer main window for the Dynamic Port Allocation vector.

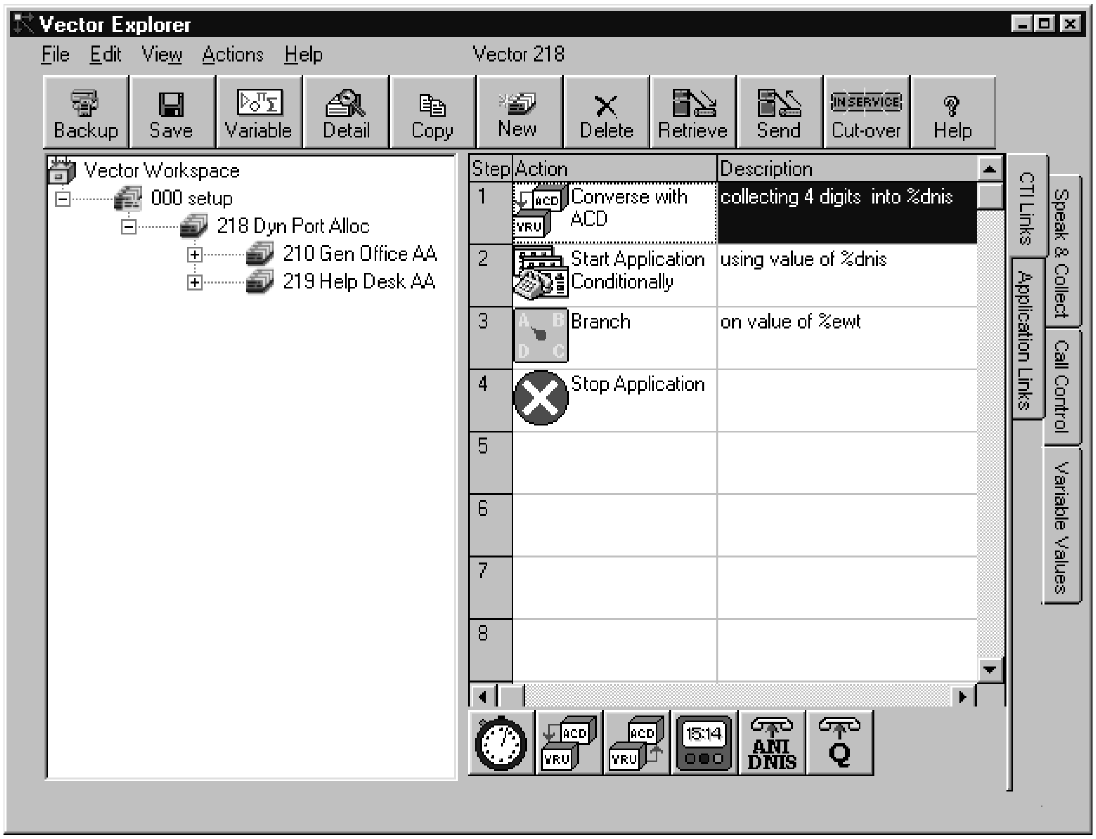


Figure 24. Vector Explorer Main Window

Modify Set Up Vector

Use the step below to modify the Set Up vector to bring the Dynamic Port Allocation vector into service:

1. Modify the Assign Channels in the Set Up vector for each channel that supports dynamic port allocation, so that the Go To Vector is the Dynamic Port Allocation vector.

   Figure 25 shows the Assign Channel window for the action in the Set Up vector after you modify it for dynamic port allocation.

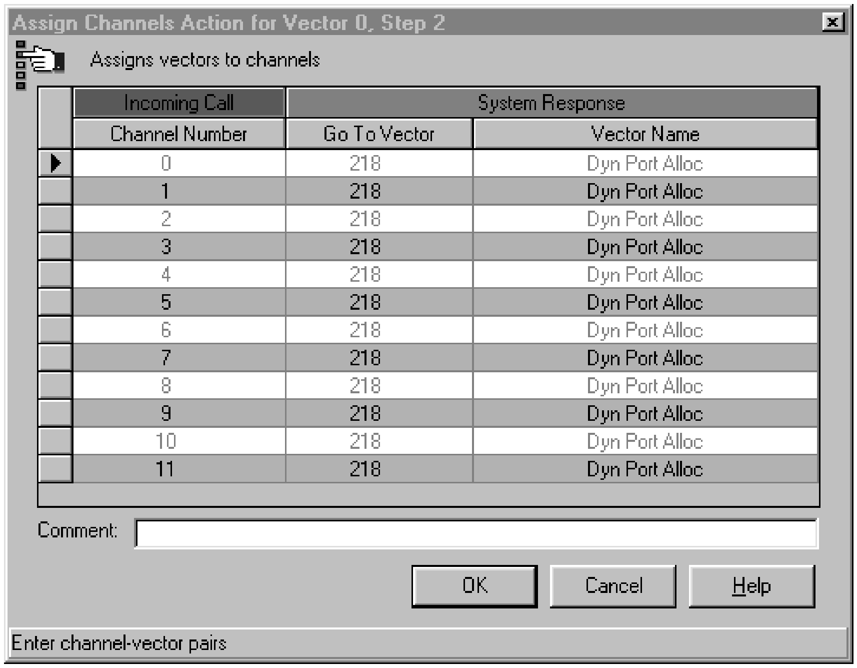


Figure 25. Assign Channel Window

Summary

While working through this chapter, you learned how to implement dynamic port allocation.

- See Chapter 5, ''Tutorial: Callback Messaging'', for information on how to set up folders and forms for callback messaging.

Tutorial: Callback Messaging

5

Overview

This chapter provides a tutorial that first describes an Automated Attendant that allows callers to leave a message for a return call and then describes how to configure the form and folder for the callback message.

Rock Coast Help Desk Automated Attendant

At Rock Coast Products, calls come into the help desk in bursts. During peak times, the wait-time for a technical service representative can be considerable. Rock Coast Products wants to spread the load more evenly over the day and encourage customers with less urgent needs to accept service at an off-peak time. To help reach this goal, Rock Coast Products wants you to design an Automated Attendant with a wait-time announcement and an option to leave a message for a return call.

The routing and announcement services of the DEFINITY switch provide much of the Help Desk Automated Attendant. The DEFINITY switch greets the caller, queues the caller for the Help Desk technical service representatives, determines the caller's estimated wait time, and operates as follows:

- If the estimated wait time is below 60 seconds, the DEFINITY switch allows the caller to continue to wait.
- If the estimated wait time is higher, the DEFINITY switch recites the estimated wait time to the caller, offers the caller the option to leave a message for a return call or to wait, and collects the caller's response.
  - If the caller chooses to leave a message, the DEFINITY switch removes the caller from queue and delivers the caller to the CONVERSANT system, passing the VDN number.
  - If the caller chooses to wait, the DEFINITY switch leaves the caller in queue.

The Customer Assist dynamic port allocation vector collects the VDN from the DEFINITY switch, and, based on the value of the VDN, starts the Help Desk Message service, which takes the message from the caller and ends the call.

Figure 26 and Figure 27 show the callflow for the Help Desk Automated Attendant.

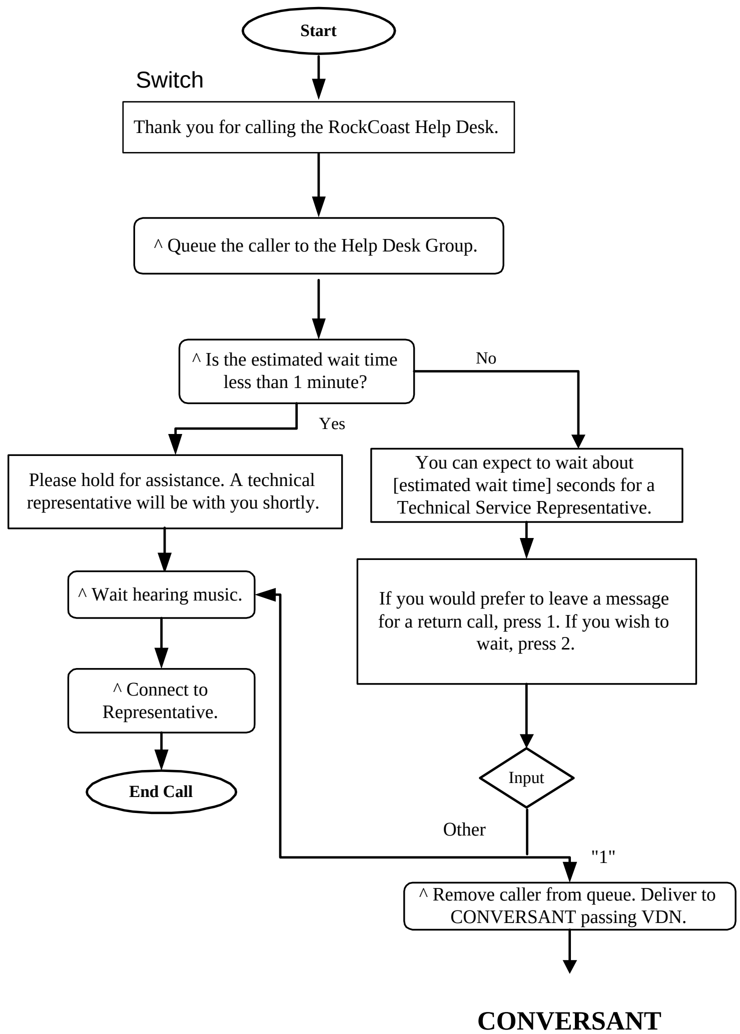


Figure 26. Help Desk Automated Attendant Callflow, Switch Services

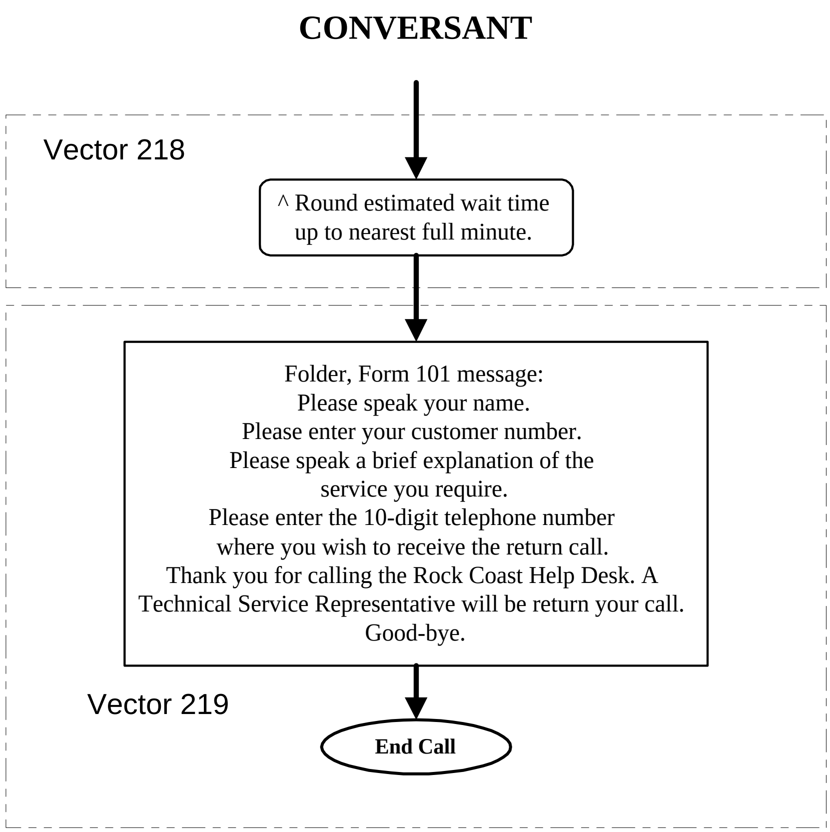


Figure 27. Help Desk Automated Attendant Callflow, Vectors 218 and 219

Appendix B, ‘‘Tutorial Examples’’, lists the vectors and actions. ‘‘Setting Up the Message Form and Folder’’ on page 71 explains the folder and form configuration for the Help Desk callback message form.

Folders and Forms

Callback Messaging operates through folders, forms, and global settings. It includes the two categories of forms, as follows:

- Voice forms—collect information, such as change of address or literature request information, from the caller. Agents transcribe the information later using the Callback Messaging transcription function.
- Callback message forms—where callers leave a message for a return call.

Both categories of forms define the series of questions that Customer Assist uses to collect the information from the caller.

Each folder has its own form. When callers finish responding to the questions in a form, Customer Assist places their responses into the folder associated with that form. The folder holds the completed form until agents dial in and transcribe it (voice form) or until Callback Messaging delivers the form to an agent for the return call (callback message form).

A callback message form is different from a voice form in two ways:

- The folder definition for a callback message includes the number that Callback Messaging must use to deliver the message to an agent.
- A callback message form includes the response(s) that contain the telephone number for the return call to the person who left the message.

See Chapter 7, ‘‘Callback Messaging Configuration Guidelines’’ of *INTUITY CONVERSANT System Customer Assist Technical Operations*, 585-313-708,for a review of settings and configurations to implement different form structures and approaches to delivering callback messages to agents and customers.

To include a form in a call script, use the Complete Message Form action. To provide agents dial in access to the form transcription function, create a call script using the Transcribe Message Forms action, which the agents can dial.

Setting Up the Message Form and Folder

WARNING:

Before you define any folders or forms, perform a Retrieve action from the Callback Messaging module to synchronize your PC workspace with the Callback Messaging configuration on the CONVERSANT. See ‘‘Synchronization for Callback Messaging’’ on page 21 for the steps to perform synchronization. Failure to synchronize can result in the loss of folder and form configurations and completed forms in folders.

To add a folder and its form, select the Add button in the main Callback Messaging Administrative window. Callback Messaging provides a Wizard which walks you through the four windows described in the sections below.

Form Identification

You create a folder and form by giving them a number and name in the Form Identification window. You can provide security for agents dialing in to transcribe completed forms by entering a password in the `Folder password` field. The `Folder talkfile` field identifies the language that agents hear during transcription. If your form will use either speech or dial pulse recognition to collect caller input, then select these entries in the `Capture numeric input using` field. Your CONVERSANT configuration must include these capabilities. Figure 28 shows the Form Identification window for the Help Desk Automated Attendant folder and form.

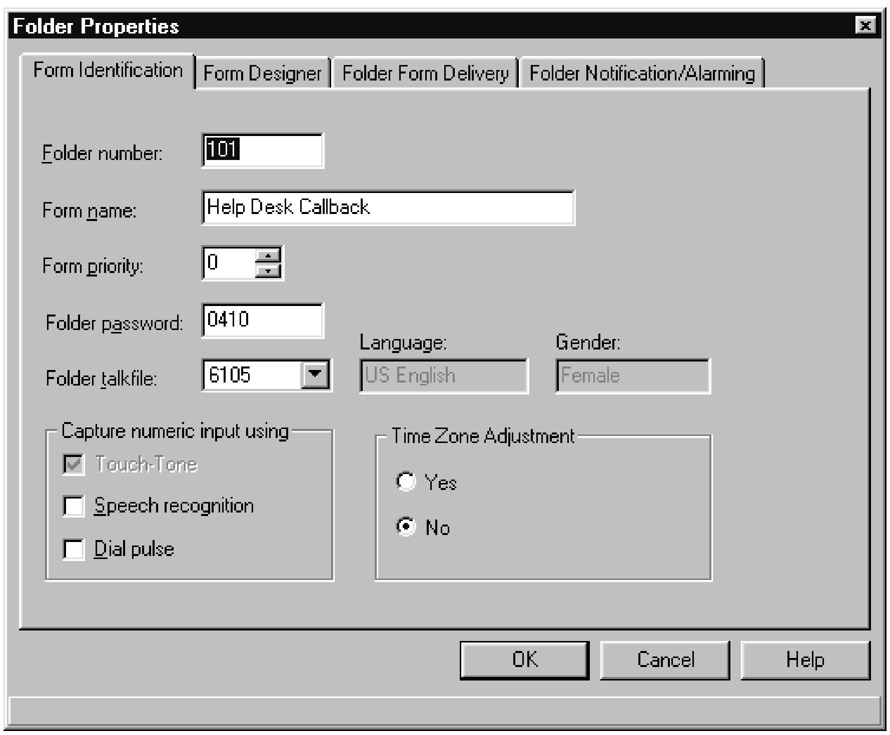


Figure 28. Form Identification window

Form Designer

Use the Form Designer window to define the form questions as well as the opening and closing speech for the form.

- Select the `Greeting` field to have Customer Assist recite an introductory phrase at the start of the form.
- Select the `Closing` field to have Customer Assist recite a concluding phrase at the end of the form (after having recited all questions within it).

If you need to create a phrase for the form, click on the microphone icon to jump directly into the Speech Administration module.

Tutorial: Rock Coast Help Desk Form

Rock Coast Products wants to collect the following information from callers who leave a message for a return call:

- Caller's name
- Caller's seven-digit customer number
- Brief description of the service requirement
- 10-digit telephone number for the return call

Figure 29 shows the Form Designer window for the Help Desk Automated Attendant form.

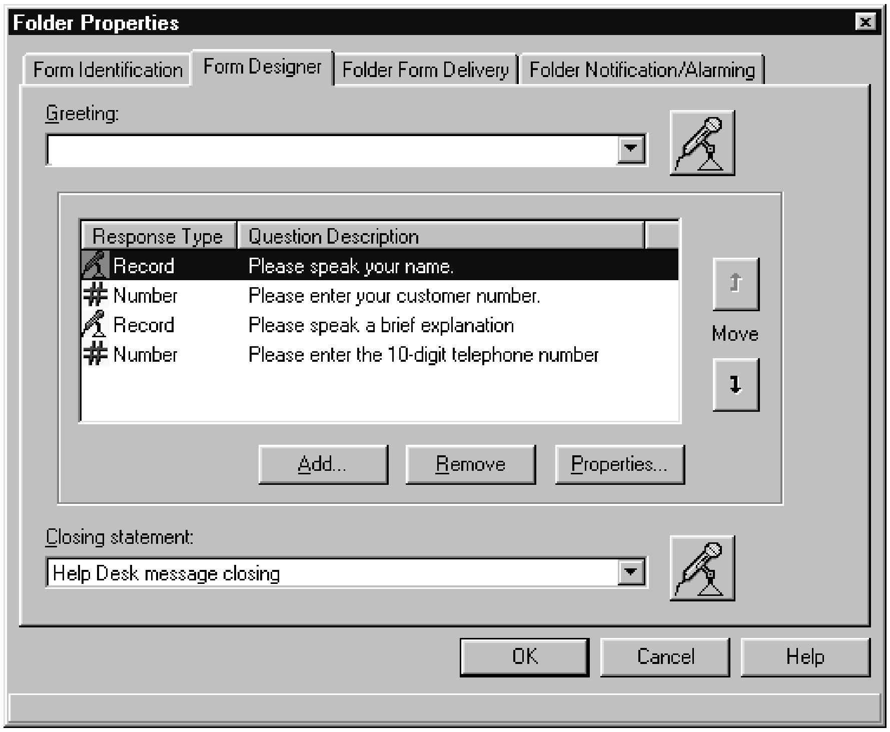


Figure 29. Form Designer window

Adding a Question to the Form

Use the steps below to add a question to the form:

1. Click on the Add button in the Form Designer window.

   The Question Response dialog box appears.

2. In the Question Response dialog box, select the type of information that the question must collect.

   The selections include the following types of questions:

   - Inform—speaks information to a caller, but does not collect input from the caller
   - Record—records the caller's response
   - Number—collects the caller's input as Touch Tone entries, or, if the CONVERSANT includes the capability, speech or dial pulse recognition input
   - Schedule—allows the caller to schedule the time for the return call

For example, the Help Desk Automated Attendant form collects the caller's name and description of the service requirement as a Record Response, and the customer number as well as the telephone number for the return call as a Number Response.

3. Complete the entries for the question per the Wizard windows

   Use the on-line Help system to obtain definitions for the fields. See Chapter 7, ''Callback Messaging Configuration Guidelines'' of the *INTUITY CONVERSANT System Customer Assist Technical Operations*, 585-313-708, for more information on how to collect the callback telephone number and structure the questions.

Changing the Question Order

To change the order of the questions in a form, highlight a question in the list in the Form Designer window. Click on the up or the down arrow to the right of the list to move the question earlier or later in the order.

Folder Form Delivery

The Folder Form Delivery window includes settings that affect how Callback Messaging delivers callback messages to agents. Use the on-line Help system for definitions of the fields. See Chapter 7, ''Callback Messaging Configuration Guidelines'' of the *INTUITY CONVERSANT System Customer Assist Technical Operations*, 585-313-708, for a review of strategies for setting the field values. Figure 30 shows the Folder Form Delivery window for the Help Desk Automated Attendant folder.

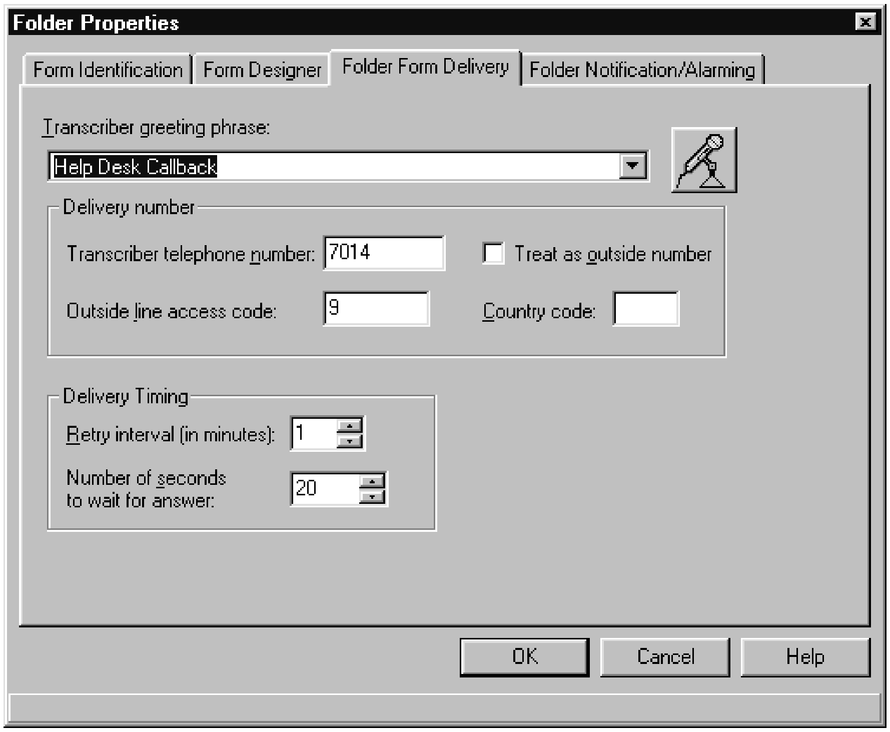


Figure 30. Folder Form Delivery Window

Folder Notification/Alarming

The Folder Notification/Alarming window contains the settings that control whether Customer Assist provides notification when new completed forms exist in the folder, or provides an alarm when the number of completed forms or the age of the oldest message in the folder exceeds a threshold. See the on-line Help system for definitions of these fields. Figure 31 shows the Folder Notification/Alarming window for the Help Desk Automated Attendant folder.

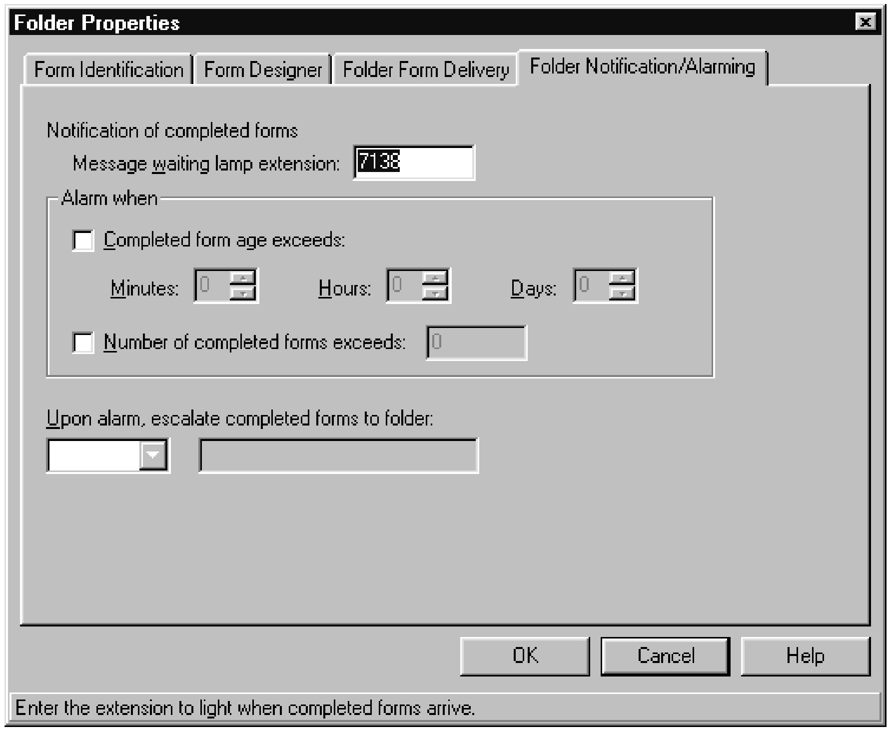


Figure 31. Folder Notification/Alarming Window

Administering Global Settings

Global settings are parameters that apply to all folders and forms. You access global settings by selecting the Global Settings button in the main Callback Messaging Administrative window. The global settings include the five tabbed dialogues below:

- Agent callback hours—allows you to set the hours during which agents are available to handle callback messages.
- Customer callback hours—allows you to set the hours in the local time of the person who is to receive the callback, during which delivery of callback messages is appropriate. An agent may be on duty in New York at 8:00 a.m., but customers in Los Angeles probably do not want to receive a return call then, as it is 5:00 a.m. in their local time.
- Agent delivery—allows you to set parameters that in part determine whether callback messaging delivers messages to agents at off peak times or on a software agent in queue basis. See Chapter 7, ‘‘Callback Messaging Configuration Guidelines’’ of the *INTUITY CONVERSANT System Customer Assist Technical Operations*, 585-313-708, for information on these alternative approaches.
- Form playback—allows you to specify the information that is heard by the agent during the message playback.
- Customer callback—allows you to determine the options the agent has in classifying during the return call and rescheduling the message, if the attempt to reach the customer is unsuccessful. See Chapter 7, ‘‘Callback Messaging Configuration Guidelines’’ of the *INTUITY CONVERSANT System Customer Assist Technical Operations*, 585-313-708, for discussion of the callback sequence and the on-line Help system for definitions of the settings.

Summary

While working through this chapter, you learned how to set up folders and forms for Callback Messaging.

- Appendix A, ‘‘Windows Administration vs. UNIX Terminology’’, gives the UNIX and Customer Assist Windows Administration name for each vector action.
- Appendix B, ‘‘Tutorial Examples’’, provides a complete listing of the vectors and actions used in the Help Desk Automated Attendant.

Windows Administration vs. UNIX Terminology

A

Overview

This appendix describes the relationship between actions that appear in Windows and those appearing in UNIX.

Actions

Table 6 shows how Customer Assist Windows Administration action names correspond to UNIX action names.

Table 6. Actions in UNIX and Windows

Action Group	Windows Action Name	UNIX Action Name
Speak & Collect	Announce	ANNOUNCE
	Announce Conditionally	DYN_ANNOU
	Announce Menu & Collect Input	MENU
	Announce Value of Variable	SPEAK_NUM
	Change Language	CHG_LANG
	Collect Rotary Input	GET_DIALP
	Collect Speech Rec Input	GET_SPCH
	Collect Touch-Tone Input	GET_DIGT

Continued on next page

Table 6. Actions in UNIX and Windows — *Continued*

Action Group	Windows Action Name	UNIX Action Name
Call Control	Answer Call	OFF_HOOK
	Assign Channels	CHAN_ASN
	Branch	SWITCH
	Branch at Time/Date	SCHEDULE
	Conduct After Call Activity	HANG_ACT
	Go To	GOTO
	Stop Application	QUIT
	Transfer Call	TRANSFER
Variable Values	Change Value of Variable	SET
	Look Up Record	LOOK_UP
	Report Value of Variable	REPORT
CTI Links	Adjust Expected Wait Time	EWT
	Calculate Delay Time	ADA_CALC
	Converse with ACD	CONVERSE
	Return Data to ACD	DATA_RTN
	Get Queue Information	Q_INFO
	Get ANI and DNIS Information	ANI_DNIS
	Retrieve Call Information	GET_DATA
	Write Call Information	SEND_DATA
Application Links	Complete Message Form	MSG_DROP
	Start Speech Administration	SPCH_ADMN
	Start Application	EXECUTE
	Start Application Conditionally	DYNAMIC
	Transcribe Message Forms	TRANSRIBE

Callback Messaging

Table 7 shows the relationship between the UNIX and Windows field names.

Table 7. Relationship between UNIX and Windows field names

Windows Based Parameter Name	Menu Based CTI Server Parameter Name
Form Identification	
Folder name:	Mailbox Name:
Folder number:	Mailbox ID:
Folder password:	Mailbox Password:
Form priority:	Mailbox Priority:
Folder talkfile:	Talkfile:
Folder Form Delivery	CALLBACK
Transcriber greeting phrase:	Transcriber welcome phrase:
Transcriber telephone number:	Agent access number
Treat as outside number	Treat as outside number?
Outside line access code:	Outside line access code:
Country code:	Country code:
Number of seconds to wait for an answer:	Time to wait for answer:
Retry interval (in minutes):	Message retry interval:
Dial pulse	Use Dial Pulse Recognition:
Speech recognition	Use Speech Recognition:
Time Zone Adjustment	Adjust for time zone?
Folder Notification/Alarming	NOTIFICATION AND ALARMS
Message waiting lamp extension:	Message Waiting Lamp extension:
Alarm when	Alarm if
Completed form age exceeds	Message age exceeds
Minutes:	Minutes:
Hours:	Hours:

Continued on next page

Table 7. Relationship between UNIX and Windows field names — *Continued*

Windows Based Parameter Name	Menu Based CTI Server Parameter Name
Days:	Days:
Number of completed forms exceeds:	Max number of messages exceeds:
Upon alarm, escalate completed forms to folder:	Forward messages into mailbox:
Form Designer	
Greeting:	
Closing statement:	Message closing phrase
Response Type	Segment Type
Question - Number Response	Data Type
	MESSAGE DROP OPTIONS:
Question description:	Phrase tag:
Number of digits:	Response limits:
Minimum:	Minimum:
Maximum:	Maximum:
Require caller to confirm response	Have caller confirm response?
Discard entire form if no response	Segment required to save message?
Transcription Options	TRANSCRIPTION OPTIONS
Play number back to transcriber	Play number back to transcriber?
Send number to telephone display or screen pop	Display field?
Treat number as phone number	Treat as phone field
Portion of phone number	Portion:
Automatically launch call	Enable automatic launch?
After callback is completed	Message treatment:
	INPUT OPTIONS
Number passed from Vector Explorer	Passed parameter?
Use 1st | 2nd | 3rd Argument	Argument:

Continued on next page

Table 7. Relationship between UNIX and Windows field names — *Continued*

Windows Based Parameter Name	Menu Based CTI Server Parameter Name
Inform	Inform Type
Question description	Phrase Tag:
Callback scheduling information	Schedule Type
	MESSAGE DROP OPTIONS
Question description:	Phrase Tag:
Require caller to confirm response	Have caller confirm?
Discard entire form if no response	Segment required to save message?
	TRANSCRIPTION OPTIONS:
Play callback schedule information back to transcriber:	Play back to transcriber?
Question - Record Response	Record Type
	MESSAGE DROP OPTIONS:
Question description:	Phrase Tag:
Length of response (seconds)	Response limits:
Minimum:	Minimum:
Maximum:	Maximum:
Recording quality:	Recording quality:
Require caller to confirm response	Have caller confirm?
Discard entire form if no response	Segment required to save message?
	TRANSCRIPTION OPTIONS:
Play recorded response back to transcriber	Play back to transcriber?
Global Settings	Mailbox Global Settings
Agent Delivery	AGENT ACCESS
Delivery interval	Channel access time:
Delivery channels:	Access channel(s):

Continued on next page

Table 7. Relationship between UNIX and Windows field names — *Continued*

Windows Based Parameter Name	Menu Based CTI Server Parameter Name
When delivering completed forms, agent must press “1” to begin transcribing	For “Press 1” for agent callback pickup:
Form Playback	MESSAGE PLAYBACK
Speak form question numbers	Speak transcription segment numbers:
Play completed form header information	Play message header information
Number of caller confirmation chances:	Number of confirmation chances:
Use 12/24 hour clock format	Time format:
Customer Callback	CUSTOMER CALLBACK
Allow rescheduling of the form during transcription	Allow agents to reschedule?
Scheduling options for callers/agents	Scheduling options:
Immediately	Immediately:
Later Today	Later today:
Later Date	Later date:
Connected call conference time:	Callback conference time:
Allow agents to classify callbacks	Allow agents to classify callbacks?
Agent Callback Hours	Agent Callback Hours
Start time Stop time	Start Time Stop Time
Customer Callback Hours	Customer Callback Hours
Start time Stop time	Start Time Stop Time

Tutorial Examples

B

Overview

This section describes the vector and form phrases that appear in the callflows in this manual.

Vector Phrases

Table 8 defines each vector phrase that appears in the callflows in this manual.

Table 8. Phrases

Phrase Number	Phrase Description	Phrase Text
8011	Brief silence	Brief period of silence
8012	Thank you for calling	Thank you for calling Rock Coast Products.
8013	Main Menu	If you know the extension of the person you wish to reach, please enter it now. For Purchasing, press 1. For Human Resources, press 2. For Accounting Services, press 3. For Operator assistance, press 0. If you are calling from a rotary phone, please hold for assistance.

Continued on next page

Table 8. Phrases — *Continued*

Phrase Number	Phrase Description	Phrase Text
8014	Not a valid extension	We're sorry. Your entry is not a valid extension. Please hold for assistance.
8015	Our normal office hours are...	Thank you for calling Rock Coast Products. Our normal office hours are 7:30 a.m. to 5:30 p.m. Central Time, Monday through Friday.
8016	If you know the extension...	If you know the extension of the person you wish to reach, enter it now. Otherwise, please call again during business hours.
8017	Not a valid extension. Good-bye	We're sorry. Your entry is not a valid extension. Good-bye.
8018	That is an invalid entry.	That is an invalid entry.
8019	Hold for assistance	Please hold for assistance.

Form Phrases

Table 9 defines each form phrase that appears in the callflows in this manual.

Table 9. Form Phrases

Phrase Number	Phrase Description	Phrase Text
8001	Please speak your name.	Please speak your name.
8002	Please enter your customer number.	Please enter your customer number.
8003	Please speak a brief explanation	Please speak a brief explanation of the service you require.
8004	Please enter the 10-digit telephone number	Please enter the 10-digit telephone number, where you wish to receive the return call.
8005	Help Desk message closing	Thank you for calling the Rock Coast Help Desk. A Technical Service Representative will return your call. Good-bye.
8006	Help Desk Callback	Help Desk callback message

Vectors

Vector: 000 Set Up (When only General Office Number Automated Attendant on System)

- Step: 01 Answer Call
- Step: 02 Assign Channels

Channel Number	Go To Vector	Vector Name
0	210	Gen Office AA
1	210	Gen Office AA
2	210	Gen Office AA
3	210	Gen Office AA
4	210	Gen Office AA
5	210	Gen Office AA
6	210	Gen Office AA
7	210	Gen Office AA
8	210	Gen Office AA
9	210	Gen Office AA
10	210	Gen Office AA
11	210	Gen Office AA

Vector: 000 Set Up (When dynamic port allocation)

- Step: 01 Answer Call
- Step: 02 Assign Channels

Channel Number	Go To Vector	Vector Name
0	218	Dyn Port Alloc
1	218	Dyn Port Alloc
2	218	Dyn Port Alloc
3	218	Dyn Port Alloc
4	218	Dyn Port Alloc
5	218	Dyn Port Alloc
6	218	Dyn Port Alloc
7	218	Dyn Port Alloc
8	218	Dyn Port Alloc
9	218	Dyn Port Alloc
10	218	Dyn Port Alloc
11	218	Dyn Port Alloc

Vector: 210 Gen Office AA

- Step: 01 Branch at Time/Date

Start/ During	HR	MN	Day	Month	Year	Goto Vector	Vector Name
During	<all>	<all>	25	May	1998	211	Out of Hrs
During	<all>	<all>	3	Jul	1998	211	Out of Hrs
During	<all>	<all>	7	Sep	1998	211	Out of Hrs
During	<all>	<all>	26	Nov	1998	211	Out of Hrs
During	<all>	<all>	27	Nov	1998	211	Out of Hrs
During	<all>	<all>	25	Dec	1998	211	Out of Hrs
During	<all>	<all>	1	Jan	1999	211	Out of Hrs
During	<all>	<all>	Sun	<all>	<all>	211	Out of Hrs
During	<all>	<all>	Sat	<all>	<all>	211	Out of Hrs

- Step: 02 Branch at Time/Date

Start/ During	HR	MN	Day	Month	Year	Goto Vector	Vector Name
Start	17	30	<all>	<all>	<all>	211	Out of Hrs
Start	07	30	<all>	<all>	<all>	212	In Hrs Main
During	<all>	<all>	<all>	<all>	<all>	211	Out of Hrs

- Step: 03 Stop Application

Vector: 211 Out of Hrs

- Step: 01 Announce
  - — Talkfile: 6104, U. S. English, female
  - — Phrase description: Our normal office hours are ...
  - — Phrase number: 8015
  - — Allow Interrupt: Yes
- Step: 02 Announce Menu Collect Input

  Prompting:
  - — Talkfile: 6104, U. S. English, female
  - — Phrase description: If you know the extension ...
  - — Phrase number: 8016
  - — Allow Interrupt: Yes
  - — Number of digits to collect:Minimum: 4
  - — Maximum: 4
  - — Time to wait for input (sec):1st digit: 5, Next digit(s): 4
  - — Place caller input in: %ci_value

  Normal Cases:
  - — Have caller confirm input: No
  - — Store output value in: %data1

Valid Input	Output Value	Go To Vector	Vector Name
7nnn	1	CONT	

  Special Cases:
  - — Caller's input not on list:
    - Phrase description: Brief silence
    - Phrase number: 8011
    - Max number of tries: 1
    - Go to vector: CONT
    - Output value: 0
  - — Caller did not enter the 1st within time allowed:
    - Phrase description: Brief silence
    - Phrase number: 8011

- Max number of tries: 1
- Go to vector: CONT
- Output value: 0

— Caller did not enter minimum number of digits required:

- Phrase description: Brief silence
- Phrase number: 8011
- Max number of tries: 1
- Go to vector: CONT
- Output value: 0

— Caller has no more tries to enter valid data:

- Phrase description: Brief silence
- Phrase number: 8011

- Step: 03 Go To
  - — Go to step/vector: Step 07
  - — If variable: %data1 = 0
- Step: 04 Look Up record
  - — Routing table: extensions
  - — Look-up value: %ci_value
  - — Number of matches found: %matched
  - — Data field 1: %date2
  - — Data field 2: %data3
- Step: 05 Go To
  - — Go to step/vector: Step 07
  - — If variable: %matched = 0
- Step: 06 Return Data to ACD
  - — Feature access code: ∗10
  - — Data return segments
    - 1: %ci_value
    - 2: #
- Step: 07 Announce
  - — Talkfile: 6104, U.S. English, female
  - — Phrase description: Not a valid extension. Good-bye
  - — Phrase number: 8017

— Allow Interrupt: Yes

- Step: 08 Stop Application

Vector: 212 In Hrs Main

- Step: 01 Announce
  — Talkfile: 6104, U. S. English, female
  — Phrase description: Thank you for calling
  — Phrase number: 8012
  — Allow Interrupt: Yes
- Step: 02 Announce Menu Collect Input

  Prompting:
  — Talkfile: 6104, U. S. English, female
  — Phrase description: Main Menu
  — Phrase number: 8013
  — Allow Interrupt: Yes
  — Number of digits to collect:Minimum: 1, Maximum: 1
  — Time to wait for input (sec):1st digit: 5, Next digit(s): 4
  — Place caller input in: %ci_value

  Normal Cases:
  — Have caller confirm input: No
  — Store output value in: %data1

Valid Input	Output Value	Go To Vector	Vector Name
0	1	213	Xfr Operator
1	1	214	Xfr Purchasing
2	1	215	Xfr HR
3	1	216	Xfr Accounting
7	1	217	Xfr Extension

Special Cases:

- Caller's input not on list:
  — Phrase description: That is an invalid entry.
  — Phrase number: 8018
  — Max number of tries: 2

  - — Go to vector: 213
  - — Output value: 0
- Caller did not enter the 1st digit within time allowed:
  - — Phrase description: Brief silence
  - — Phrase number: 8011
  - — Max number of tries: 1
  - — Go to vector: 213
  - — Output value: 0
- Caller did not enter minimum number of digits required:
  - — Phrase description: That is an invalid entry.
  - — Phrase number: 8018
  - — Max number of tries: 2
  - — Go to vector: 213
  - — Output value: 0
- Caller has no more tries to enter valid data:
  - — Phrase description: Hold for assistance
  - — Phrase number: 8019
- Step: 03 Stop Application

Vector: 213 Xfr Operator

- Step: 01 Return Data to ACD
  - — Feature access code: ∗10
  - — Data return segments
    - 1: 7000#
- Step: 02 Stop Application

Vector: 214 Xfr Purchasing

- Step: 01 Return Data to ACD
  - — Feature access code: ∗10
  - — Data return segments
    - 1: 7010#
- Step: 02 Stop Application

Vector: 215 Xfr HR

- Step: 01 Return Data to ACD
  - Feature access code: *10
  - Data return segments
    - 1: 7011#
- Step: 02 Stop Application

Vector: 216 Xfr Accounting

- Step: 01 Return Data to ACD
  - Feature access code: *10
  - Data return segments
    - 1: 7012#
- Step: 02 Stop Application

Vector: 217 Xfr Extension

- Step: 01 Collect Touch Tone Input
  - Maximum number of digits to collect: 3
  - Load digits into variable: %ci_value
- Step: 02 Go To
  - Go to step/vector: Step 07
  - If variable: %num_dig_got < 3
- Step: 03 Change Value of Variable
  - Variable: %ci_value
  - Operator: +
  - Value: 7000
  - Comment: Add 7000 to the last three digits of extension to make full 7nnn extension number
- Step: 04 Look Up record
  - Routing table: extensions
  - Look-up value: %ci_value
  - Number of matches found: %matched
  - Data field 1: %date2
  - Data field 2: %data3

- Step: 05 Go To
  - — Go to step/vector: Step 07
  - — If variable: %matched = 0
- Step: 06 Return Data to ACD
  - — Feature access code: ∗10
  - — Data return segments
    - 1: %ci_value
    - 2: #
- Step: 07 Announce
  - — Talkfile: 6104, U. S. English, female
  - — Phrase description: Not a valid extension
  - — Phrase number: 8014
  - — Allow Interrupt: Yes
- Step: 08 Go To
  - — Go to step/vector: Vector 213
  - — If variable: blank (Unconditional)
- Step: 09 Stop Application

Vector: 218 Dyn Port Alloc

- Step: 01 Converse with ACD
  - — Maximum number of digits to collect: 4
  - — Load digits into variable: %dnis
- Step: 02 Start Application Conditionally
  - — Variable to evaluate: %dnis

Value	Program
7103	sales_suppor
7104	customer_inq

- Step: 03 Branch
  - — Variable to evaluate: %dnis

Valid Value	Go To Vector	Vector Name
7101	210	Gen Office AA
7102	219	Help Desk Msg

- Step: 04 Stop Application

Vector: 219 Help Desk Msg

- Step: 01 Complete Message Form
  - — Drop message in folder: 101 Help Desk Callback
- Step: 02 Stop Application

Help Desk Callback Message Folder and Form

- Form Identification
  - — Folder number: 101
  - — Form number: Help Desk Callback
  - — Form priority: 0
  - — Folder password: 0410
  - — Folder talkfile: 6104, U. S. English, female
  - — Capture numeric input: Touch Tone
  - — Time Zone Adjustment: No
- Form Designer
  - — Greeting: blank
  - — Closing: 8005 Help Desk message closing

  Question: 01
  - — Question description: 8001 Please speak your name
  - — Type response: Record
  - — Length of response: Minimum: 1, Maximum: 10
  - — Recording quality: ADPCM32
  - — Require caller to confirm response: No
  - — Discard entire form if no response: No
  - — Play recorded response back to transcriber: Yes

  Question: 02

- — Question description: 8002 Please enter your customer number
- — Type response: Number
- — Number passed form Vector Explorer: No
- — Number of digits: Minimum: 7, Maximum: 7
- — Require caller to confirm response: No
- — Discard entire form if no response: No
- — Play number back to transcriber: Yes
- — Send number to telephone display or screen pop: No
- — Treat as telephone number: No

Question: 03

- — Question description: 8003 Please speak a brief explanation
- — Type response: Record
- — Length of response: Minimum: 3, Maximum: 30
- — Recording quality: ADPCM32
- — Require caller to confirm response: No
- — Discard entire form if no response: No
- — Play recorded response back to transcriber: Yes

Question: 04

- — Question Description: 8004 Please enter the 10-digit telephone number
- — Type response: Number
- — Number passed form Vector Explorer: No
- — Number of digits: Minimum: 10, Maximum: 10
- — Require caller to confirm response: Yes
- — Discard entire form if no response: Yes
- — Play number back to transcriber: No
- — Send number to telephone display or screen pop: No
- — Treat as phone number: Yes
- — Portion of phone number: Whole
- — Automatically launch call: No

- Folder Form Delivery
  - — Transcriber greeting phrase: 8006 Help Desk Callback
  - — Transcriber telephone number: 7014
  - — Treat as outside number: blank

- — Outside line access code: 9
- — Country code: blank
- — Retry interval: 1
- — Number of seconds to wait for answer: 20

- Folder Notification/Alarming
  - — Message waiting light extension: 7138

  Alarm when:
  - — Completed form age exceeds: blank
  - — Number of completed forms exceeds: blank
  - — Upon alarm, escalate completed forms to folder: blank

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