



OAISYS Net Phone

ACD Viewer

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Net Phone ACD Viewer

The *OAISYS Net Phone ACD Viewer* program allows Net Phone users connected to Strata ACD to view the status of all ACD groups in which they are members. It shows the operating status of each group and as the group becomes busier it changes colors and can provide warning sounds to alert you of status changes. You can expand each group view to see the number of calls and the status of each of the agents and supervisors in the group. Each group contains a “My Status” icon showing your own status in the group (logged in, logged out, busy, in wrap-up, etc), and when you right-click on your icon you can change your status.

The ACD Viewer is fully integrated with the Net Phone Chat so you can easily place a chat call to a supervisor or another agent by simply right-clicking on that person’s icon. Plus you can broadcast a chat notification to all agents and supervisors in the group.

Note: Strata ACD must be operating in Enhanced Mode for ACD Viewer to be used. ACD Viewer will only operate on Net Phone version 5.1 or newer.

OAISYS

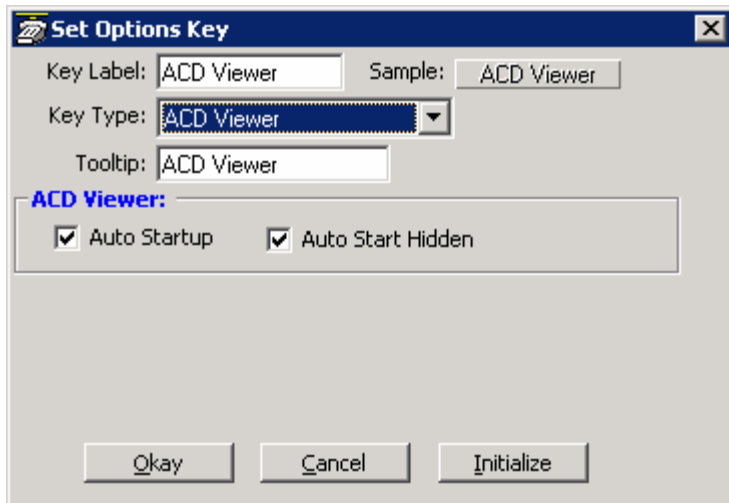
OAISYS specializes in “Computer Telephony Integration” (CTI) products and services. Our headquarters are in Tempe, Arizona, USA and we can be reached at **(888) 496-9040** or at **www.oaisys.com**

ACD Viewer Setup

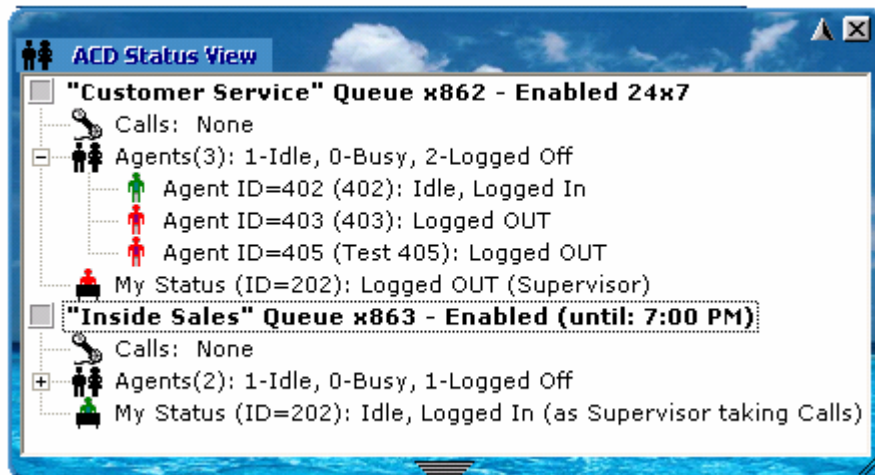
To use **ACD Viewer** you must first program an options button on your Net Phone.



If the **ACD Viewer** does not appear by default right click on one of the options buttons and select **Change Key**. Select **ACD Viewer** as the Key Type from the drop down. Enter the name you'd like displayed on the button in the Key Label field. Enter the tool tip you'd like displayed as you hover your mouse over the button on the Net Phone. Enter a check in the box to indicate if you'd like the **ACD Viewer** to be displayed or hidden upon Startup.



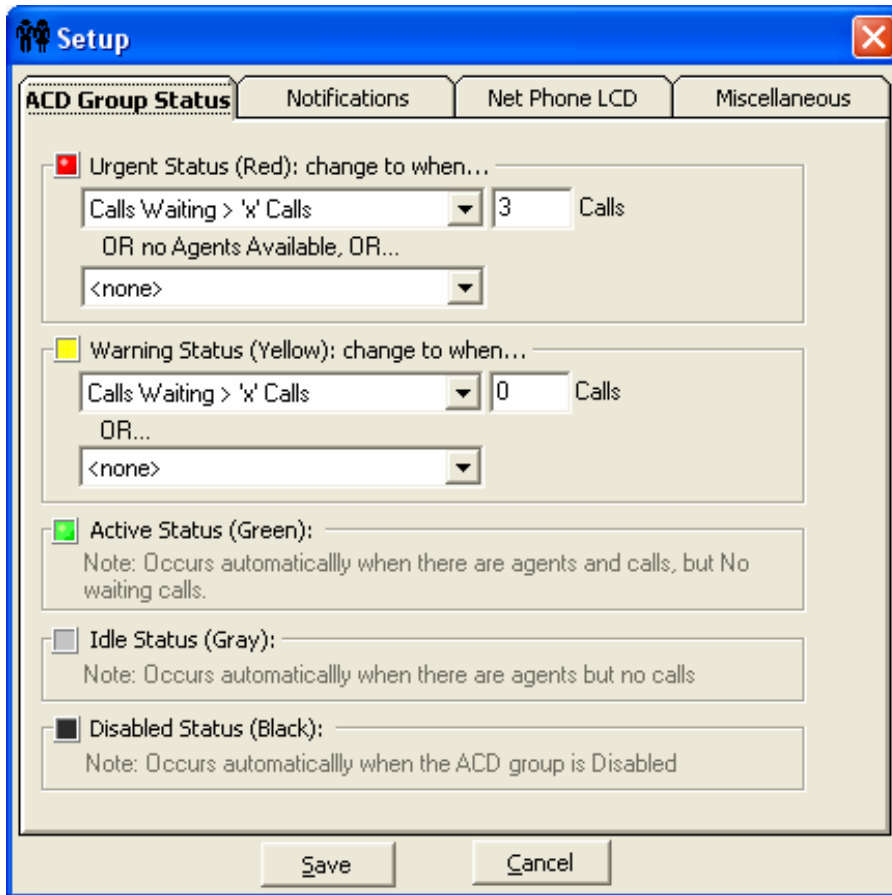
Note: Typically you would enable the “Auto Startup” option so that the ACD Viewer is automatically started each time Net Phone is started.



The ACD View has many configuration options that allow you to customize it to your needs. When the ACD Viewer is operating and visible you can configure it's settings by clicking on the icon in the upper left hand corner and selecting the Setup menu.

ACD Group Status

This section allows you to setup how ACD viewer changes ACD group status based on activity conditions. Different colors represent the different status conditions of (how busy is) each ACD group. Yellow and Red represent warning and urgent status levels respectively and can be specifically configured to decide when those levels should be reached.



Urgent Status (Red)

This is the highest level status of a queue and should typically be reached when the load or conditions in the ACD queue indicates a problem that needs attention. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Red. In addition to these two conditions, this status will automatically be reached whenever the queue is enabled but there are NO agents available. Available conditions are:

Calls Waiting > 'x' calls
 Longest Waiting Call > 'x' Secs
 Waiting Calls / Agent > 'x' %

Warning Status (Yellow)

This is the 2nd highest level status of a queue and should typically be reached when the load in the ACD queue is approaching a problem level. You can select up to two conditions so that whenever either of these conditions are met the ACD Group Status button will turn Yellow. The available conditions are:

Calls Waiting > 'x' calls
 Longest Waiting Call > 'x' Secs
 Waiting Calls / Agent > 'x' %

Active Status (Green), Idle Status (Gray), and Disabled Status (Black)

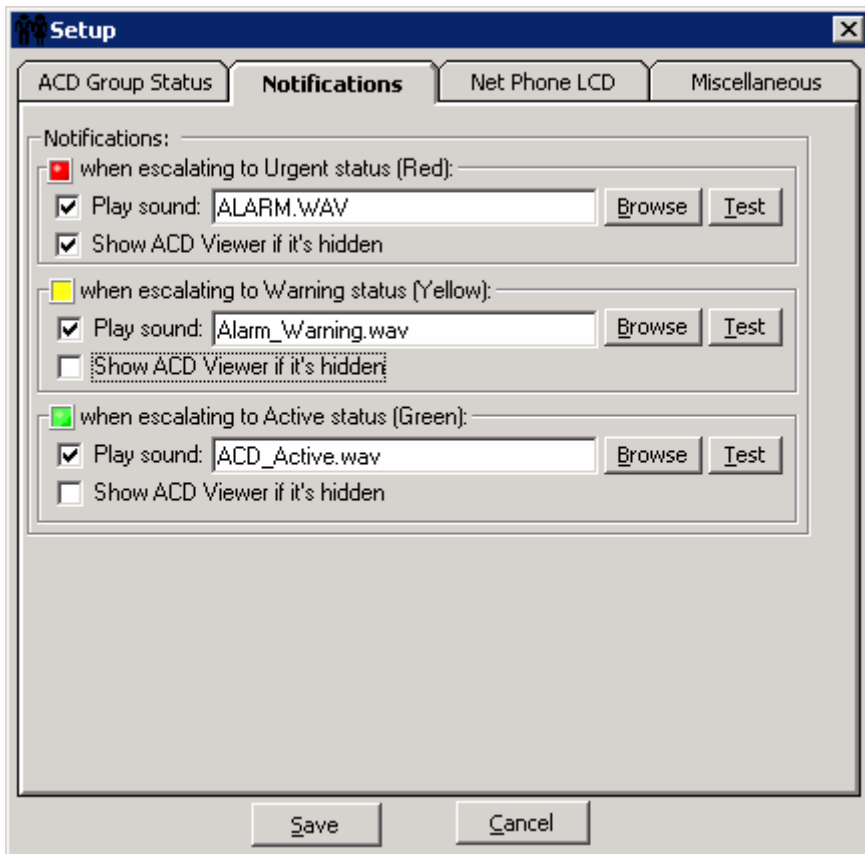
The ACD Group Status will automatically appear Green if there are agents logged into the group and there are calls taking place in the group, but there are no waiting calls for the group. The status will automatically appear Gray when

there are agents available to take ACD calls, but there are no calls. Black indicates the queue is Disabled (or off-schedule) and not receiving calls.

Notifications

This section allows you to setup audible and visible notifications that can be taken when an Urgent, Warning, and Active status is met. If desired, enter a checkmark in the Play Sound box to hear a sound over the speakers on your PC when a status is met. Use the Browse button to browse to a specific wav file. Use the test button to hear the selected sound. Enter a checkmark in the box if you'd like to Show the ACD Viewer if it is hidden on your screen when a Status is met. This will bring the Net Phone and the ACD Viewer to the forefront of your screen.

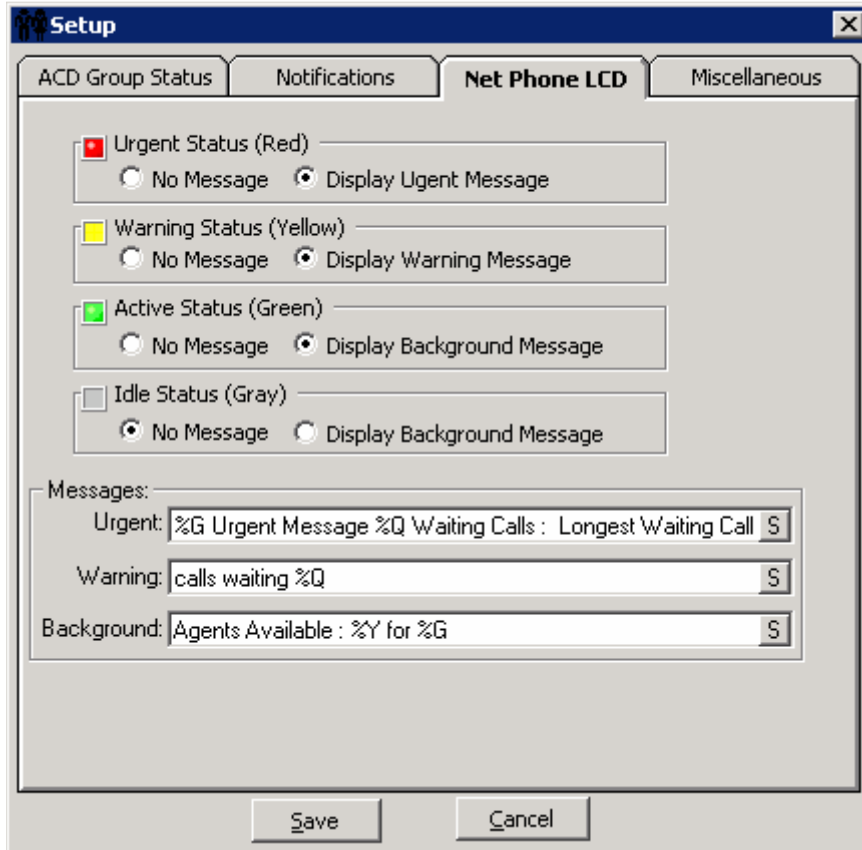
Click **Save** to save all changes.



Net Phone LCD

In some cases you may want to keep the ACD viewer hidden but have it send messages to the LCD display of the Net Phone to show the ACD queues status. This is often very useful when the Net Phone is docked to the screen and you want to conserve screen space for use by other applications. Thus, ACD Viewer can be configured to send Low/Medium/High priority messages to scroll along the 2nd line of the Net Phone LCD display.

If the user clicks on a scrolling LCD ACD message in Net Phone, the ACD Viewer will 'roll out' into view.



Select the appropriate radial button to indicate whether or not you'd like to display a message when an ACD Group Status condition has been met.

Enter the text you'd like to display for the Urgent, Warning, or Background Messages.

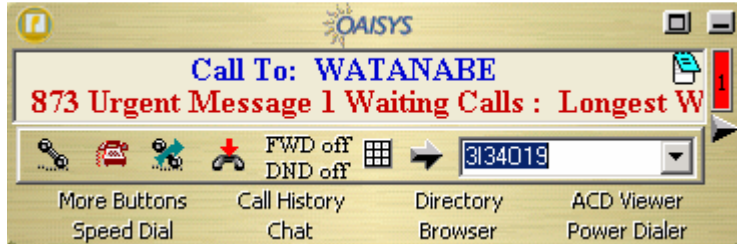
Enter the text exactly as you'd like it displayed in the Net Phone. Use the following tokens to represent ACD Group information.

ACD Viewer Tokens

- %G – ACD Pilot Extension
- %L – Longest Waiting Call
- %W – ACD Group Name
- % % - Percent Sign
- %Q - # of Waiting Calls
- %Z – Calls per agent
- %Y - # of Agents Available
- %C - Total Calls
- %X – Total Agents

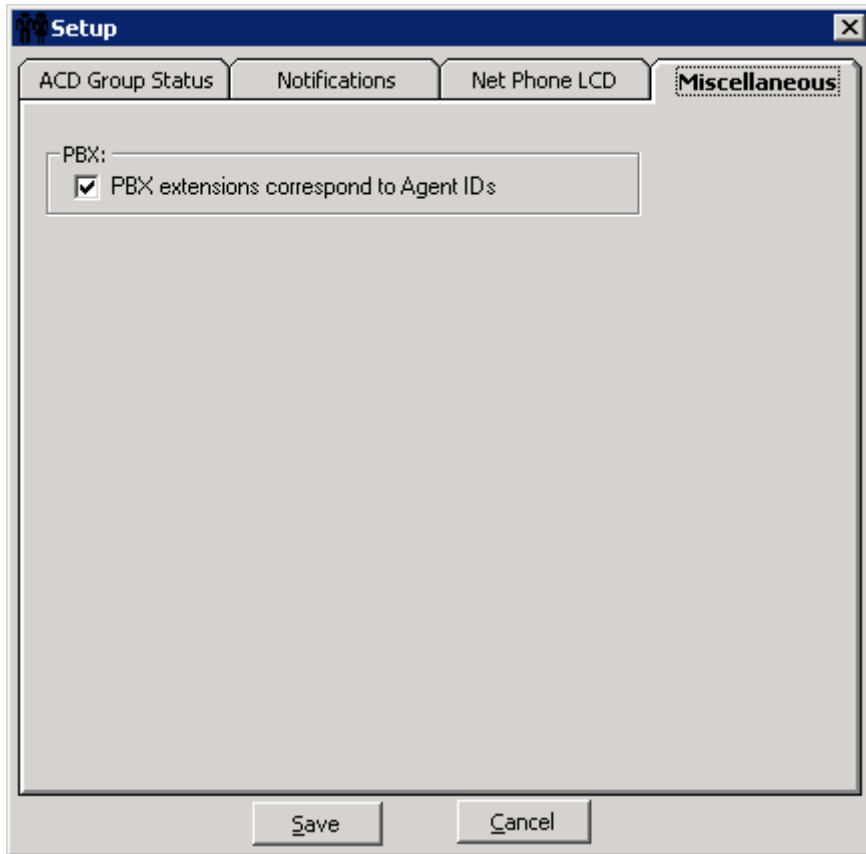
For example the following text would display in the Net Phone's LCD as shown below.

%G Urgent Message %Q Waiting Calls: Longest Waiting Call: %L



Miscellaneous

If on your system each Agent ID is the same as his/her PBX extension you should enable the "PBX extensions correspond to Agent IDs" option. That is agent ID "100" uses PBX extension "100", agent ID "105" uses PBX extension "105, etc. With this type of installation, you will be able to place a chat call (or chat broadcast message) to an agent even when he/she is not Logged In to an ACD group.



Using ACD Viewer

This section describes how to use the ACD Viewer for both agents and supervisors.

Collapsed View

The ACD Viewer starts out with a ‘collapsed’ view of each ACD queue. This takes up very little screen space but still provides a high-level status of each of your ACD groups. That is, the ACD Status View window displays one line for each of the ACD Groups of which you are a member. The ACD Group Name, Queue Number, and Status (Enabled or Disabled) are displayed. If the queue is on a schedule, the time the queue will be enabled/disabled by the schedule is displayed.

Each ACD queue has an activity LED that changes colors based on the status of the queue:

Gray (Idle) = no calls active (or waiting) and at least 1 agent logged-in and available.

Green (Active) = at least one call active but no calls waiting and at least one agent logged-in and available.

Yellow (Warning) = Default: one call waiting and at least one agent logged in. But this threshold is configurable.

Red (Urgent) = Default: Two or more calls waiting OR no agents logged-in and available. But this threshold is configurable.

Black (Disabled) = the ACD queue is disabled (either by a supervisor or by being after-hours in the schedule).

To ‘expand’ the information on an ACD group, simply click on the Plus sign in the status LED or right click the group and select ‘Expand’ menu. Other things you can do to a queue via right-click menu include:

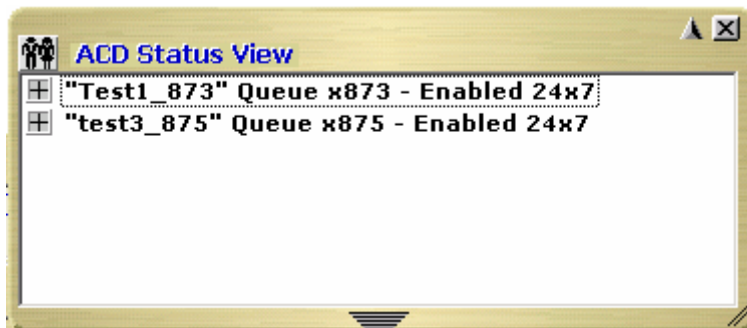
Collapse – Collapse the group view (if it is in ‘expanded’ view)

Chat Broadcast – Send a broadcast chat message to all agents and supervisors in the queue.

Enable Queue – Enable the queue 24x7 if currently disabled. (Supervisor only)

Disable Queue – Disable the queue if it is currently enabled. (Supervisor only)

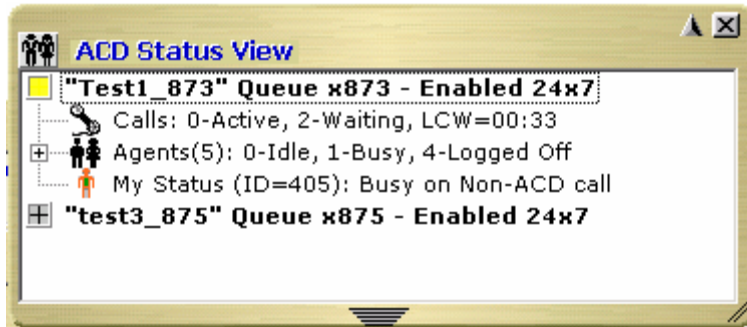
Use Schedule – Enable the queue using the Schedule for the queue. (Supervisor only) *The schedule days/times are setup in Strata ACD.



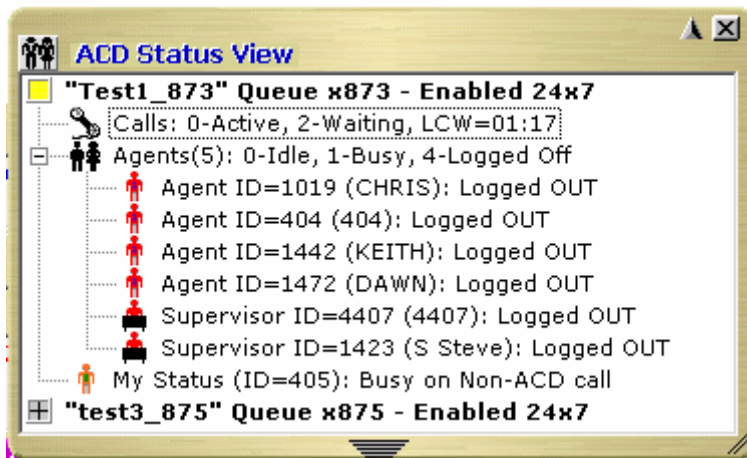
Expanded View

When you want to see more detailed information on an ACD queue, you can change to the ‘expanded’ view. As mentioned previously, to ‘expand’ the information on an ACD group, simply click on the Plus sign in the status LED or right-click the group and select ‘Expand’ menu. In this view you see a more detailed view of: (1) Calls in the queue, (2) other Agents and Supervisors in the group and (3) your own status.

1) The “Calls” line shows the current number of Active and Waiting calls in queue as well as how long the longest call has been waiting (displayed as LCW for “Longest Call Waiting”).



2) The “Agents” line shows how many total agents are in the ACD Group as well as a breakdown showing the number of Idle, Busy, Unavailable, and Logged Off agents. By clicking on the Plus sign you can further expand the view to show each agent’s ID, Name, and Status. Plus the status of each Supervisor is also shown in this list. Right-click on an agent or supervisor in the ACD Group to send them a Chat message, or if you are idle, to Call the agent or supervisor on the phone.



3) The last line in the expanded view is the “My Status” line. This not only shows your personal status in this ACD group but allows you to change your status and perform functions using right-click menus as described in the following section.

My Status

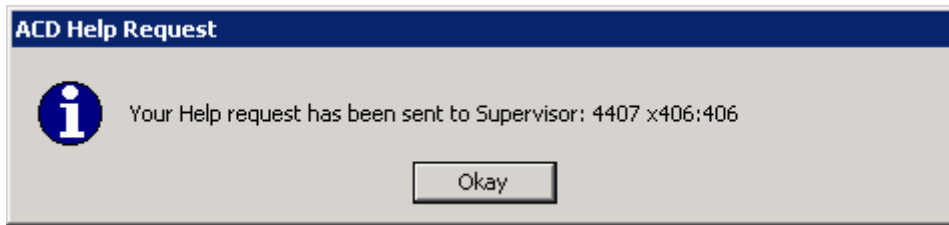
In the expanded view, the “My Status” icon is a special icon that shows your status in the ACD group (logged in, logged out, busy, in wrap-up, etc), and when you right-click on your icon you can change your status or perform a function. The options provided are:

- 1) **Log In** – this will log you into this ACD group.
- 2) **Log In and Take Calls** – (supervisor only) – This allows a supervisor to simultaneously log in as a supervisor and as an agent (to take calls).
- 3) **Log Out** – this will log you out of this ACD group.

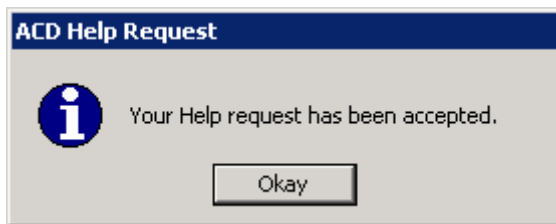
- 4) **Make Me Available** – If you are set to ‘unavailable’ or are in ‘wrap-up’, this will change you to ‘available’ status.
- 5) **Make Me Unavailable** – you can select this to make yourself ‘unavailable’ – a list of unavailable message choices will be provided.
- 6) **Request Help Call to Supervisor** – while you are on an ACD call, you can use this to initiate a request for a help call to a supervisor in the ACD group. This is further explained below.

Requesting Supervisor Help

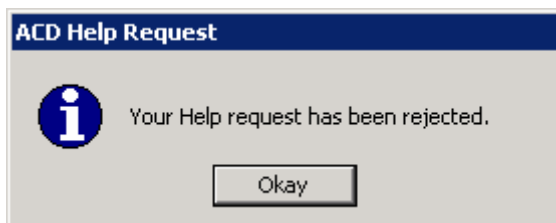
When the **Request Help Call to Supervisor** function is selected, this sends a Help Request to a supervisor in the ACD Group. Once you initiate the request you will receive a notification that the request has been sent.



If the supervisor accepts your request for help you will receive notification.



If the supervisor denies your request you will receive a rejection notification.



If a supervisor or supervisors do not respond to your request you will see the following:

