

Telrad

ACD 10

Installing and Getting Started

76-110-0675/F
Release 6, Issue 1

ACD 10

**Installing
and Getting Started**

**Telrad Telecommunications Inc.
Woodbury, N.Y.**

NOTICE

This publication refers to Telrad's **ACD IQ** package running on Telrad's DIGITAL KEY BX system, Releases SB-6 and up, or on Telrad's DIGITAL 400 system, Releases DB-6 and up, as of September, 1998.

This publication describes the operation of the agent's position, using any Telrad DIGITAL telephone, although preferably one with a display.

Telrad reserves the right to modify the equipment and the software described herein without prior notice. However, changes made to the equipment or to the software described herein do not necessarily render this publication invalid.

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Section 1

INTRODUCTION

1.1 ABOUT THE *ACD IQ* SYSTEM

ACD IQ is a comprehensive telephone management system designed to monitor the activities of a Call Center. While monitoring Call Center activities, the system generates reports summarizing the past performance of the system over a given time period, and provides statistical analyses of the Call Center system behaviour, within a specified period.

The *ACD IQ* system enables management to accurately assess Call Center activity trends. On the basis of this information, management can provide the most efficient personnel allocation plan to meet the Call Center requirements.

Figure 1-1 displays the relationship between the *ACD IQ* server database and one client station.

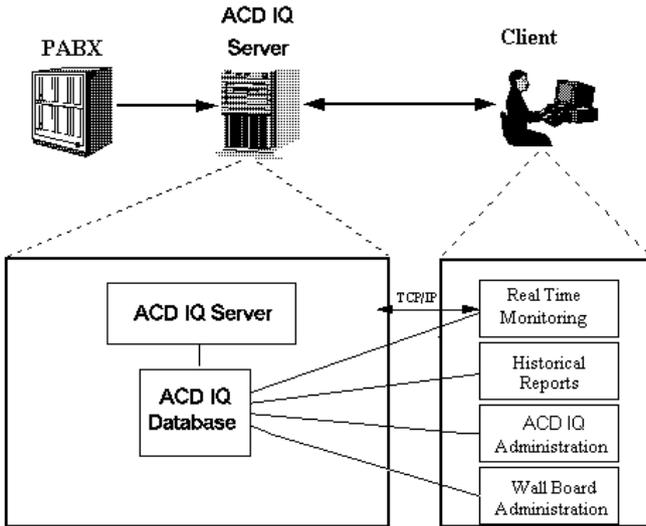


Figure 1-1: ACD IQ Server-Client Relationship

Figure 1-2 below displays a configuration in which several similar client stations are attached to the server:

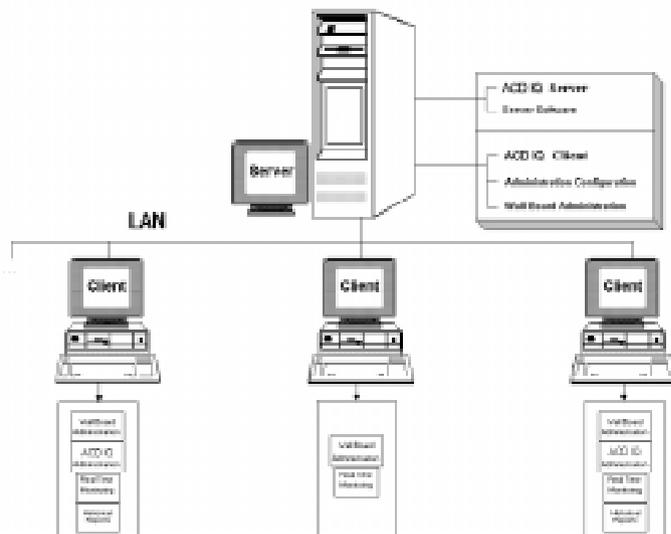


Figure 1-2: Typical Server - Multi-Client Relationship

In this example, the server is attached to several client stations. In addition to the server's *ACD IQ* installation, each client station has *ACD IQ* client applications installed on its hard disk. On one client station, only the Real-Time Monitoring and the Wall Board Administration applications have been installed.

This guide describes the installation procedures to be followed for the following three *ACD IQ* installation configurations:

- **Network Client-Server Configuration** - For this configuration, the requirements and installation procedures to be performed on both the server and client computers, are described.

- **Standalone Configuration** - For this configuration, the requirements and installation procedure to be performed on the standalone computer, are described.
- **Real-Time Client Configuration** - For this configuration, the requirements and installation procedures required for a Real-Time client configuration are described.

1.2 SCOPE OF THIS GUIDE

This guide describes how to install the software necessary to run the Telrad *ACD IQ* system. It describes the installation procedures for the three *ACD IQ* installation configurations, described in the previous section.

It is intended for the PBX technician who installs the *ACD IQ* system on a client/server network or on a standalone computer. It is assumed that the reader is familiar with the physical hardware setup of the *ACD IQ* system and the physical connections between the system's units.

The guide is also intended to provide "getting started" information for Call Center administrators and other users of the system.

In addition, this guide provides a basic overview of the four *ACD IQ* applications that comprise the system, as well as a troubleshooting chapter that describes the procedures that can be followed, in the event of problems that may occur during the course of the installation procedure.

NOTES

This guide is not intended as a user guide for the *ACD IQ* system. It does not describe how to use the *ACD IQ* applications in detail. For comprehensive information on how to use the *ACD IQ* applications, refer to the context sensitive on-line help system provided.

For the latest information on the *ACD IQ* system, please refer to the read.me file provided with the installation CD.

1.3 HOW IS THIS GUIDE ORGANIZED

This guide is divided into the following four chapters:

- Section 1: **Introduction**, gets you acquainted with the *ACD IQ* system, and explains the purpose, structure and relevant information related to this guide.
- Section 2: **Installation Guide**, provides step-by-step instructions on how to install *ACD IQ* on each platform available, including the screens presented during the installation procedure.
- Section 3: **Getting Started**, provides a basic introduction to the *ACD IQ* applications and displays sample screens for each application.
- Section 4: **Troubleshooting**, lists the problems that may occur during the installation process and suggested remedial actions for them.

1.4 TYPOGRAPHICAL CONVENTIONS IN THIS GUIDE

Various typographical conventions are used throughout this guide to help you follow the text. The following kinds of formatting identify specific information:

Arial font	Words that appear in this font are actual words that appear in the windows and dialog boxes of the software applications.
Italic font	Apart from the name of the product itself, words that appear <i>in italics</i> indicate cross-references to other sections or figures within the Guide.
Note:	Important notes are preceded by the word Note : presented in bold typeface, with lines above and below.
Arrow bullet and bold type	Text that is bold and preceded by an arrow bullet indicates the start of a procedure or task that you can perform.
Black square bullet	Text that is preceded by a black square bullet indicates that this task requires only one step.
Bulleted List	Text that is preceded by a black diamond bullet indicates a list of points in no particular order.
Numbered List	Text that is preceded by a number indicates a list of sequential points or a series of steps you must perform in order.
<Text enclosed by arrow-shaped brackets and in Arial font>	Words that are enclosed by arrow-shaped brackets and in this font indicate the name of a key on the keyboard or keypad, e.g. the <Enter> key.

1.5 ABBREVIATIONS & TERMINOLOGY

For a complete list and explanation of *ACD IQ* and telephony terminology, refer to the glossary provided in the *ACD IQ* context sensitive on-line help system.

The following terms are used frequently throughout this guide:

- | | |
|-------------|---|
| PBX/PABX | Private Branch eXchange/Private Automatic Branch eXchange. |
| Lock Device | The software protection plug, or dongle, (hasp) attached to the parallel port. The software will neither install nor run without this device. |

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Section 2

INSTALLATION GUIDE

2.1 PREPARING THE SYSTEM

This chapter describes the step-by-step procedure for installing the *ACD IQ* system on each available platform. At each step, the appropriate windows or screens are described. The installation process is basically an automatic procedure, requiring minimum intervention on the technician's part.

NOTE

Before beginning the installation process, make sure you have attached the appropriate lock device to the server and client computers (one for the server and one for each client computer), where necessary. Without the lock device, you will not be able to install the system.

Following is a summarized checklist of the operations to be performed in order to install and run the *ACD IQ* program:

- Set up the computers.
- Set up the network and test it using the assigned network TCP/IP addresses.
- Test the connectivity of the computers and server using the PING utility.
- Install the server software and check that it runs correctly.

- Install the client software and check that it runs correctly. Make sure that the server is running before checking.
- Perform the initial administration process, as described in Section 3.3 Setting the Parameters for a First Time Installation.

2.2 HARDWARE REQUIREMENTS

This section lists the minimum hardware requirements necessary to install and run the *ACD IQ* system, for the server, client and network computers.

2.2.1 Server

The server computer must include the following hardware:

- CPU Pentium 200 MHz or higher.
- 64 MB RAM or higher.
- An NT supported Network Interface Card.
- An NT supported modem (for remote maintenance). The modem must be configurable as COM3.
- Two free serial ports (the first is for the PABX connection, the second is for the Wall Board connection).
- *ACD IQ* Server Lock Device (Hasp).

2.2.2 Client

The client computer must be a standard PC computer with the following hardware:

- CPU Pentium.
- 16 MB RAM.
- Network Interface Card.
- *ACD IQ* Client Lock Device (Hasp).

2.2.3 Network

All server/client computers must be connected on a LAN that supports TCP/IP.

2.3 SOFTWARE REQUIREMENTS

This section defines the minimum software requirements for installing and running the *ACD IQ* system, for a server or standalone system, or client station.

2.3.1 Server or Standalone System

The server or standalone computer must be configured with the following software:

- Windows NT Workstation 4.0.

NOTE

The Sybase SQL Anywhere 5.5 software is installed by the *ACD IQ* installation program.

2.3.2 Client Station

- DOS (6.2 or above) plus Windows 3.11, or Windows 95.

NOTE

The Sybase SQL Anywhere software is installed by the *ACD IQ* installation program.

2.4 THE INSTALLATION PROCEDURE

The *ACD IQ* system can be configured to run in one of the following configurations:

- **Standalone Server and Client Configuration:** In this configuration, the server and client software are installed on the same Win NT Workstation computer.
- **Network Server and Clients Configuration:** In this configuration, the server is installed on a Win NT Workstation computer, and the clients are installed on different PC's/Windows computer (one per client station).

The installation procedure automatically identifies the type of installation that is required, by reading the information found on the computer's lock device.

You will need the following items to install *ACD IQ*:

- *ACD IQ* Installation CD-ROM.
- *ACD IQ* Server Lock Device (one).
- *ACD IQ* Client Lock Device (one for each network client).

2.4.1 Installing the *ACD IQ* Server

The following installation procedure is identical for all the available configurations.

To install the *ACD IQ* Server system:

1. Ensure that all the prerequisite software required for the server has been installed (see Section 2.3.1 Server or Standalone System).
2. Connect the PBX to a COM port on the Server (COM1 is the default), check the date/time on both (the PBX and the Server) and synchronize them if needed.
3. Connect the Wall Board to another COM port on the Server.
4. Install the Server Lock Device on the parallel port.
5. Insert the *ACD IQ* installation CD-ROM into the CD Drive.
6. The CD-ROM is incorporated with autorun directives so by default it should start the setup process when detected. If for some reason there is a need to activate it manually, the SETUP32.EXE program located on the ACDIQ directory of the CD-ROM should be started.
7. If this is a first installation, then the server will probably not have the required software driver for reading the lock device. In this case, the installation program installs the required drivers.

Section 2: INSTALLATION GUIDE

If the device driver is installed, but no lock device is found, or a lock device which is not for a Server station is installed, then the following message will be displayed.



Figure 2-1: No Suitable Lock Device Found

8. Install the correct lock device and restart the installation.

In order to install and run the ACD IQ server, the user must be the NT "Administrator" user. If the user is not the Administrator, the following message is displayed:

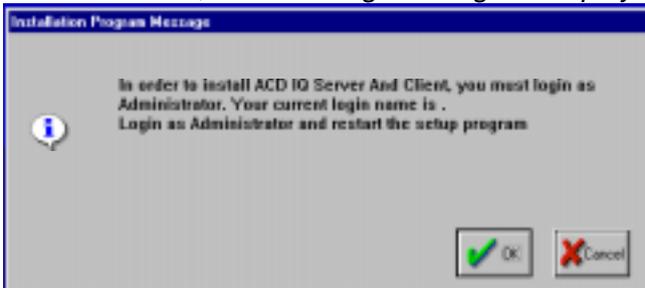


Figure 2-2: User is not the NT Administrator

NOTE

Once installation is completed, the NT will not ask for login, but will login automatically as "Administrator".

9. If a valid Server Lock Device is found, the following welcome message is displayed:

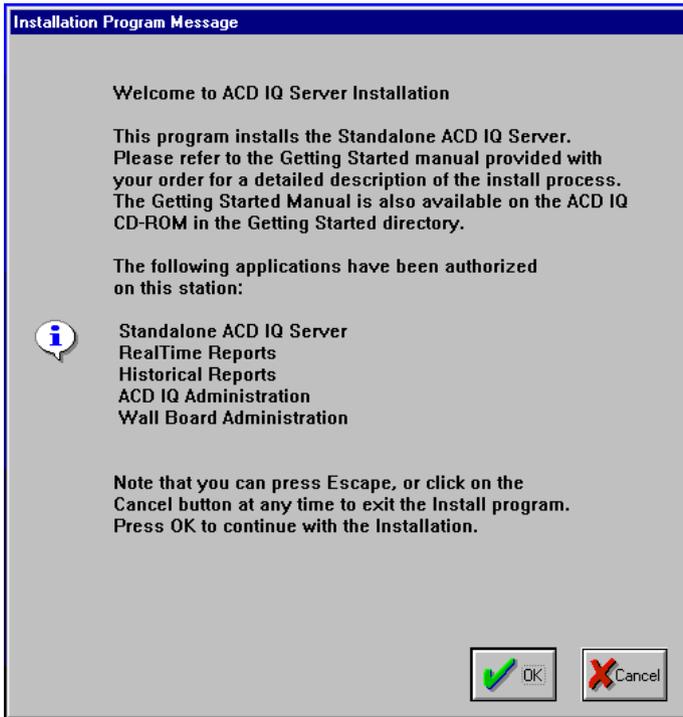


Figure 2-3: The welcome Message

NOTE

This message changes according to the installation procedure selected by the lock device.

The installation program automatically identifies the type of installation to be performed (from the hardlock key).

Section 2: INSTALLATION GUIDE

10. Press <Enter> to continue, or <Esc> to exit the installation program.

The installation program displays the prompt shown in Figure 2-4:

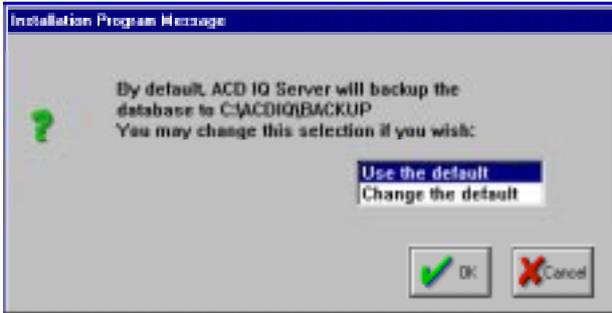


Figure 2-4: Selecting the ACD IQ Drive

11. By default, *ACD IQ* is installed on drive C: under the directory C:\ACDIQ.

To install *ACD IQ* on drive C:

- Select Use the default drive.

To install *ACD IQ* on a different drive:

- Select Change the drive and select the required drive from the list.

In order to run properly, *ACD IQ* must know the administrator password. The default is no password. You can change it in the following message box that is displayed:

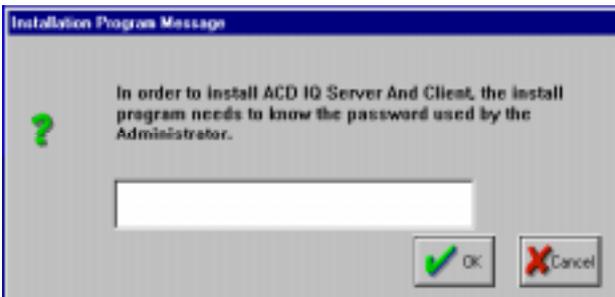


Figure 2-5: Change administrator password

12. The current TCP/IP address of the server is displayed and you are prompted to confirm or change it as required, as shown in Figure 2-6.

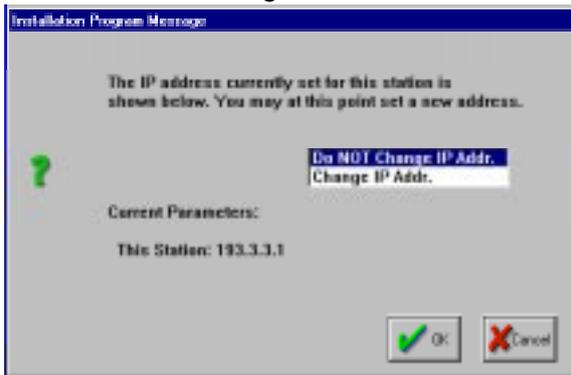


Figure 2-6: Confirming the Server IP Address

13. If you choose to change the IP addresses, you are prompted for the IP address of the server station. If you are not sure of the correct IP address, please ask the network administrator.

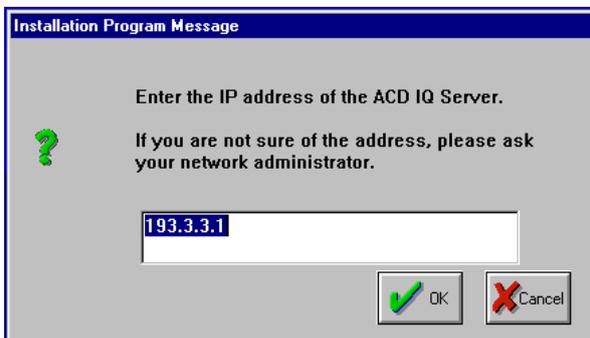


Figure 2-7: Changing the Server IP Address

14. The server name is used by the *ACD IQ* clients to connect to the server. The default name is 'ACDIQ'. There is no need to change it, unless you intend to place more

Section 2: INSTALLATION GUIDE

than one *ACD IQ* Network server on the same network.

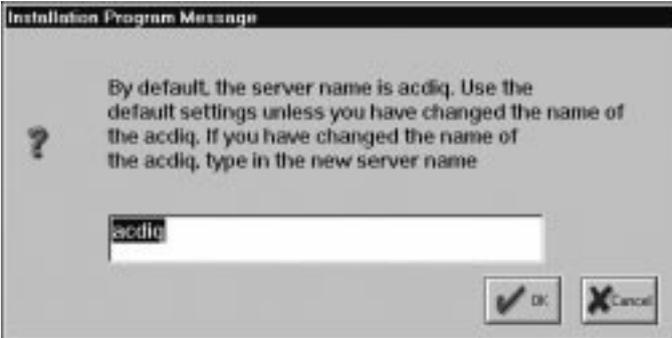


Figure 2-8: Changing the Server Name

15. By default, the installation procedure installs the Sybase SQL Anywhere 5.5 Database software in the directory C:\SQLANY50. You may now change this directory (though it is not recommended):

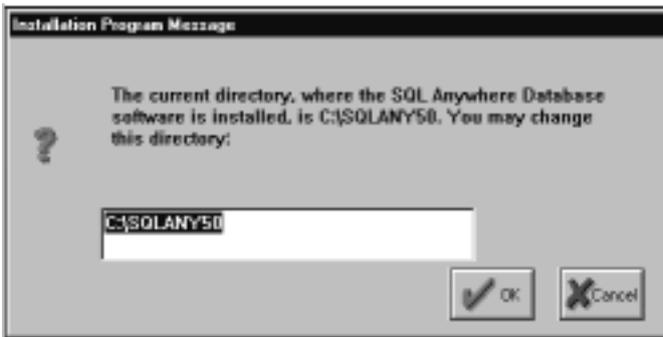


Figure 2-9: Entering the SQL Directory

16. By default, the server backs up the database to \ACDIQ\Backup under the selected drive. You can change it in the message box displayed in Figure 2-10. To change the target drive, give a full path name. This

path is used by the server computer.

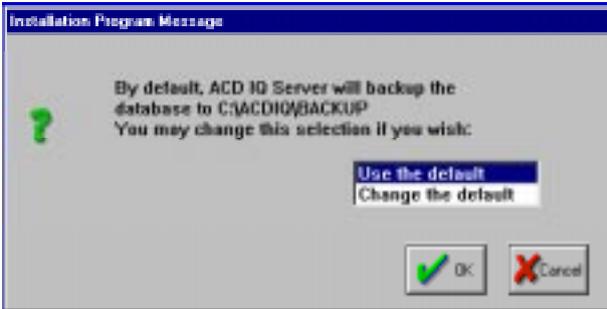


Figure 2-10: Confirming the Server Backup Database Path

After the Sybase SQL Anywhere 5.5 software has been located, for a server installation, the following message is displayed:



Figure 2-11: The Ready for Installation Message

NOTE

This message changes according to the installation procedure selected by the lock device.

The setup program installs the required software and continues with step 15 of the Client installation, as described in the following section.

NOTE

In order to start the *ACD IQ* server you must reboot the computer.

2.4.2 Installing the *ACD IQ* Client

The Client installation procedure is identical for all the available client configurations. However, some of the client applications may not be installed, depending on the information that is stored in the lock device.

To install the *ACD IQ* client software:

1. Ensure that all the prerequisite software required for the client has been installed (see Section 2.3.2 Client Station).
2. Install the Client Lock Device on the parallel port.
3. Insert the *ACD IQ* installation CD-ROM into the CD-ROM drive.
4. The CD-ROM is incorporated with autorun directives so by default it should start the setup process when detected. If for some reason there is a need to activate it manually, the SETUP32.EXE program located on the ACDIQ directory of the CD-ROM should be started.
5. If a valid lock device is not found, then an appropriate message will be displayed, and the install program will exit. Install the correct lock device and start again from step 4.

The installation program automatically identifies the type of installation to be performed (from the hardlock key).

The Opening Window is displayed. After a few seconds, the Welcome screen shown in Figure 2-12 is displayed.

Note that the list of authorized client applications according to the lock device, is displayed.

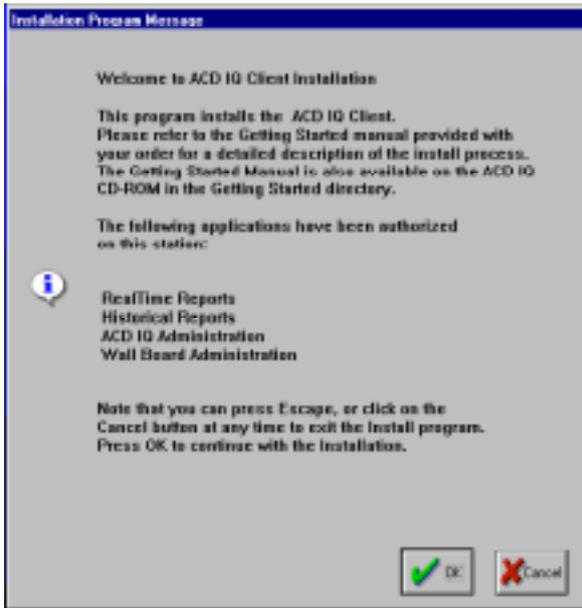


Figure 2-12: The Welcom Screen

6. Click OK to continue, or Cancel to exit the installation program.
7. The installation program displays the prompt shown in Figure 2-13:



Figure 2-13: Selecting the ACD IQ Drive

Section 2: INSTALLATION GUIDE

- By default, *ACD IQ* client is installed on drive C: under the directory C:\ACDIQ.

To install *ACD IQ* on drive C:

- Select Use the default drive.

To install *ACD IQ* on a different drive:

- Select Change the drive and select the required drive from the list.

- The current server and client IP addresses are displayed, and you are prompted to confirm or change them as required, as shown in Figure 2-14.



Figure 2-14: Confirming IP Address

- If you choose to change the IP addresses, you are prompted for the IP address of the client station, and then, of the server station as shown in Figure 2-15 and Figure 2-16. If you are not sure of the correct IP

addresses, please ask the network administrator.

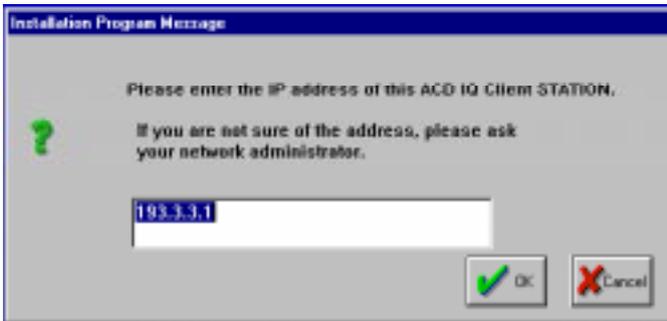


Figure 2-15: Changing the Client IP Address

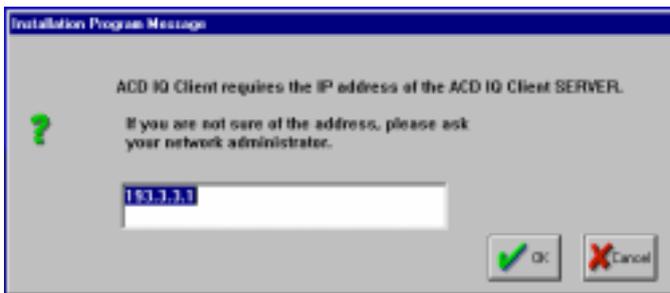


Figure 2-16: Changing the Client Server IP Address

11. The server name is used by the *ACD IQ* client to connect to the server database. The default name is *ACDIQ*. You should change it only if you changed the server name.

Section 2: INSTALLATION GUIDE



Figure 2-17: Changing the Server name

12. By default, the installation procedure installs the Sybase SQL Anywhere 5.5 Database Software in the directory C:\SQLANY50 (see Figure 2-9: Entering the SQL Directory). You may now change this directory (though it is not recommended).
13. After clicking OK the following message is displayed.

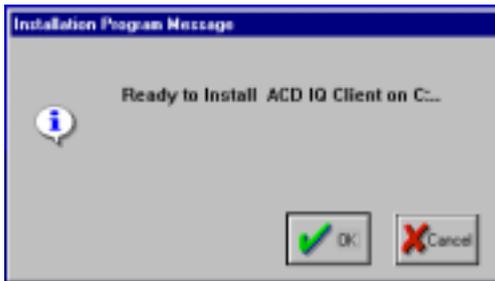


Figure 2-18: The Ready for Installation Message

NOTE

This message changes according to the installation procedure selected by the lock device.

14. Click OK to continue. The files are copied into the appropriate directories. While the files are being copied,

a progress bar showing the percentage completed, is presented.

After the files have been copied, the following message is displayed:

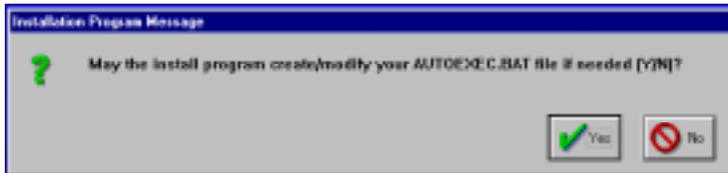


Figure 2-19: The Modifying AUTOEXEC.BAT file message

15. If you click Yes, the installation process makes the necessary changes to the AUTOEXEC.BAT file and informs you of them. In addition, a backup copy of the original AUTOEXEC.BAT file is made under the name AUTOEXEC.BAK.

NOTE

If you have any problems you can restore the original AUTOEXEC.BAT file by overwriting the current AUTOEXEC.BAT file with AUTOEXEC.BAK.

Once the installation is completed, the following message is displayed:

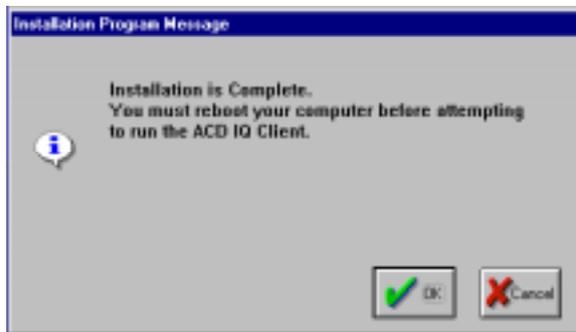


Figure 2-20: The Installation is complete Message

16. Click OK. When you have finished, reboot the computer.

You are now ready to run ACD IQ.

2.4.3 After Installation

At the end of the installation process for a Network Client configuration, the following ACD IQ Program Group opens:



Figure 2-21: ACD IQ Program Group

At the end of the installation process for a Standalone configuration, the ACD IQ Program Group opens with two additional icons, for starting and stopping ACD IQ, as displayed below:



Figure 2-22: ACD IQ Program Group (Standalone)

The following four *ACD IQ* applications are located on the server and on each client station:

- Administration;
- Real-Time Monitoring;
- Historical Reports;
- Wall Board Administration.

NOTE

On the network client station, the Real-Time Monitoring application is copied to the Startup folder to enable it to run automatically. On the server, an icon is copied to the Startup folder to enable you to start ACD IQ.

In order to load *ACD IQ*, shut down and turn off the server or standalone computer, wait a few seconds, and then turn it on again. The database server is loaded and the *ACD IQ* server starts up. For a first-time installation, initial database setup is required (see Sections 3.1-3.3 for details).

2.4.4 Installing Over an Existing ACD IQ System

To upgrade or install *ACD IQ* over an existing *ACD IQ* system, follow the relevant steps in the procedure described in section 2.4.1 Installing the ACD IQ Server. Note that existing data in the database is not deleted by this installation.

Section 3

GETTING STARTED

3.1 STARTING THE ACD IQ SYSTEM

3.1.1 Starting the Server

To start the *ACD IQ* server:

- Turn on the server computer.

When NT starts, it will load and run the *ACD IQ* Server, via the Windows Start menu. During the startup process, the following window is displayed:

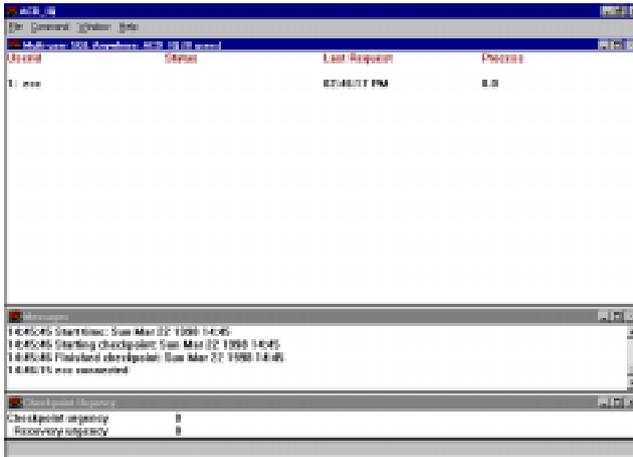


Figure 3-1: Connecting to the Server

NOTE

It is recommended that you minimize this window!

3.1.2 Starting the Client

To start the *ACD IQ* client:

1. Turn on the client computer.
2. Enter Windows for Win 3.11.

The Sybase SQL Anywhere 5.5 Client is automatically loaded, and tries to link to the *ACD IQ* server. After it succeeds in linking to the server, Figure 3-2 is displayed.

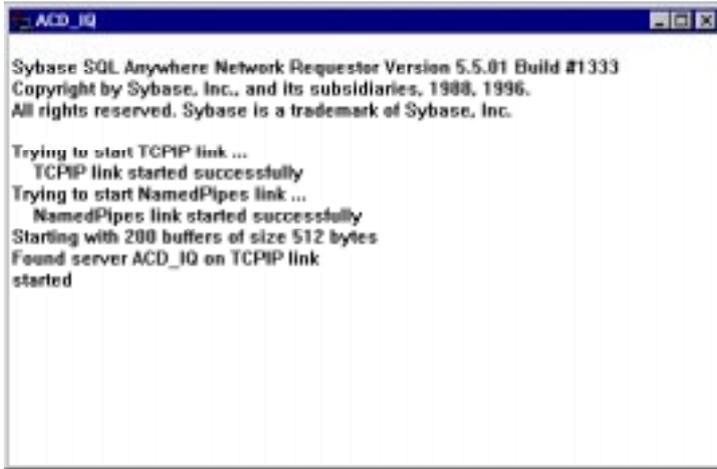


Figure 3-2: Connected to the Server

If the client cannot connect to the server, an error message is displayed. For details about problem handling, refer to Section 4: Troubleshooting.

NOTE

For a standalone system, the operations described in Sections 3.1.1 Starting the Server and 3.1.2 Starting the Client are performed on the server.

Section 3: GETTING STARTED

The *ACD IQ* Program Group contains five icons:



Historical Reports

Used to run the Historical Reports application.



ACD IQ Administration

Used to run the Administration application.



ACD IQ Help

Used to run the *ACD IQ* on-line help system.



Real-Time Monitoring

Used to run the Real-Time Monitoring application.



Wall Board Administration

Used to run the wall board administration application.

To run an *ACD IQ* application:

- Double-click on the appropriate icon in the *ACD IQ* group.

NOTE

If this is a first installation, you must define initial parameters before running the client applications (see Section 3.3 Setting the Parameters for a First Time Installation).

The *ACD IQ* Login window is displayed. Before you can enter an *ACD IQ* application, you must first be assigned a unique user name and password by the system manager.

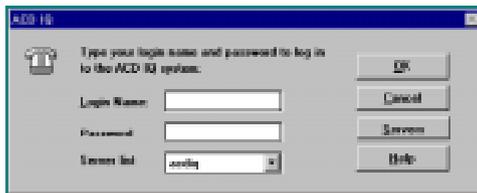


Figure 3-3: The *ACD IQ* Login Window

To log in to a selected application:

1. Enter you login name in the Login Name field.
2. Enter your password in the Password field.
3. Click OK.

If you type an incorrect user name or password, the following error message is displayed and you will not be able to access the selected application.



Figure 3-4: The Login Error Message

4. Click OK to exit the dialog box and try again.

3.2 SHUTTING DOWN THE SYSTEM

3.2.1 Shutting Down the Server

To shut down the server:

- Double-click on the Stop button in the *ACD IQ* Program Group.

The Server shuts down automatically.

3.2.2 Shutting Down a Client Station

To shut down a client station:

1. Exit any open applications by pressing <Alt+F4>.
2. Exit Windows by pressing <Alt+F4> (for Windows 3.11 only).

3.3 SETTING THE PARAMETERS FOR A FIRST TIME INSTALLATION

After installing *ACD IQ* for the first time, in order to be able to run the system, a number of initial parameters must be defined in the *ACD IQ* Administration.

To define the initial parameters for a first time installation:

1. Access the *ACD IQ* Administration application by double-clicking the Administration icon in the Program Group.
2. In the *ACD IQ* Login window that opens (see Figure 3-3: The *ACD IQ* Login Window), enter the following login name and password:

Login Name: ea

Password: e1996

NOTE

This is the login name and password of a supervisor with full rights to access and edit all the *ACD IQ* parameters. The administrator of the system is asked to setup one more supervisor with similar privileges for regular work and to avoid the use of EA which should be saved for backup and technical maintenance.

After entering the password, the initial Administration screen is displayed.

3. The first step to be done is to set the general options used in *ACD IQ*. From the menu bar of the main screen, select the General menu. From this menu,

select the Options option (see Figure 3-5).

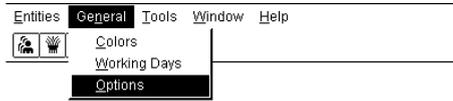


Figure 3-5: Accessing the General Options Parameters

The General Options parameters are displayed in the screen.

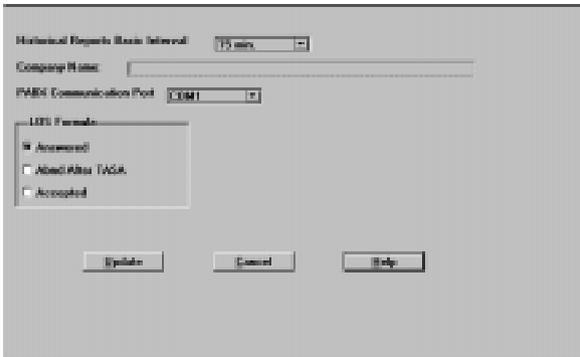


Figure 3-6: General Options Parameters

4. Set the parameters according to your requirements, or leave the default values, as displayed. (For detailed information, refer to the online help system.) When you have finished, click the Update button.
5. Next, you can (optionally) specify the working/non-working days in the system. This information is necessary for calculating the daily average for historical reports by intervals, that span more than one day. To do this, select the Working Days option from the General menu (see Figure 3-5), and specify the working/non-working days as described in the online help system.
6. The next step is to define agent groups and their parameters. To do this, select the Groups item from the

Entities menu (see Figure 3-7).



Figure 3-7: Accessing the Groups Parameters

- From the Group menu item that appears in the menu bar, select the Add option (see Figure 3-8).
The Groups General Parameters are displayed in the screen.

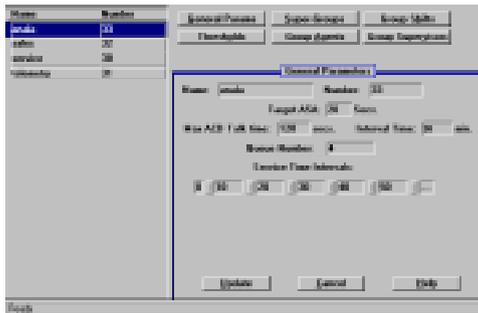


Figure 3-8: Add Group General Parameters

- Click the following push buttons and define the parameters for each option, as specified in the online help system:
 - General Params
 - Thresholds (optional but recommended)
 - Group Agents
- At a later stage, you may want to define Super-Groups and Group Supervisors as required. You may not remove the default supervisor **ea**, but make sure there is at least one other supervisor defined with full rights!

10. Shutdown the server by selecting the Shutdown option from the Tools menu (see Figure 3-9).

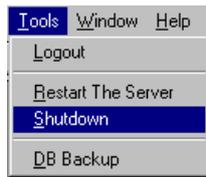


Figure 3-9: Tools Menu

3.4 ACD IQ CLIENT APPLICATIONS

The *ACD IQ* system comprises four applications; each as a separate entity and running independently of the other applications. This section provides a brief description of each application (with sample screens), and describes various basic tasks that can be performed from each application.

3.4.1 The Administration Application

The *ACD IQ* Administration enables authorized supervisors to define system entities and modify them. The system configuration determined using this application, defines the information that will be available for Historical and Real-Time reports.

Administration Application Operations

This section describes how to perform the following basic operations in the *ACD IQ* Administration:

1. Creating a new agent group.
2. Defining the parameters for the new group.
3. Adding agents to the newly created agent group.

Creating a New Agent Group

To create a new agent group:

1. Double click on the Administration icon in the *ACD IQ* Program Group (see Figure 3-3: The *ACD IQ* Login

Section 3: GETTING STARTED

Window) to access the application and enter your login name and password in the Login window that opens. The Administration application main screen opens.

2. From the Entities menu, select the Groups option.
3. From the Group menu item that displays, select the Add option.
4. A message is displayed informing you that the group will be seen only after restarting *ACD IQ*.
5. Click OK.

A new group is added to the list of groups displayed on the left side of the Administration screen, and its default parameters are displayed on the right side of the screen.

Figure 3-10 below shows the General Parameters Group screen from the *ACD IQ* Administration.

The screenshot shows a dialog box titled "General Parameters". It contains the following fields and controls:

- Name:
- Number:
- Target ASA: Secs.
- Max ACD Talk time: secs.
- Interval Time: min.
- Queue Number:
- Service Time Intervals: A row of buttons labeled 0, 10, 20, 30, 40, 50, and
- Buttons: Update, Cancel, Help

Figure 3-10: The Group General Parameters Screen

Defining the Parameters

To define parameters for the new group:

- Fill in the General Parameters fields as displayed in the screen above (Figure 3-10), according to the following fields descriptions:

Field	Description
Name	The name of the selected group.
Number	The dial number of the group.
Target ASA	Target Average Speed of Answer. The amount of time (in seconds) that the call should be answered, from the time it is received.
Max ACD Talk Time	The maximum amount of time (in seconds) suggested for a call on the line. Calls that exceed this time period are indicated in statistical reports.
Interval Time	Determines the time period that will be monitored in the real-time reports for the group. Setting this field to 10 min., for example, will cause the real-time report for that group to show statistical information relevant for the last 10 minutes.
Queue Number	A number used in the PCP program as the group number.
Service Time Intervals	Time periods that serve as start points for <i>ACD IQ</i> statistical information. This parameter determines the time periods, within which, calls waiting in the queue will be monitored in STI histogram reports. Leave the default values displayed here (0, 10, 20, 30, 40, 50).

Once you have finished defining the parameters:

- Click Update to save them.

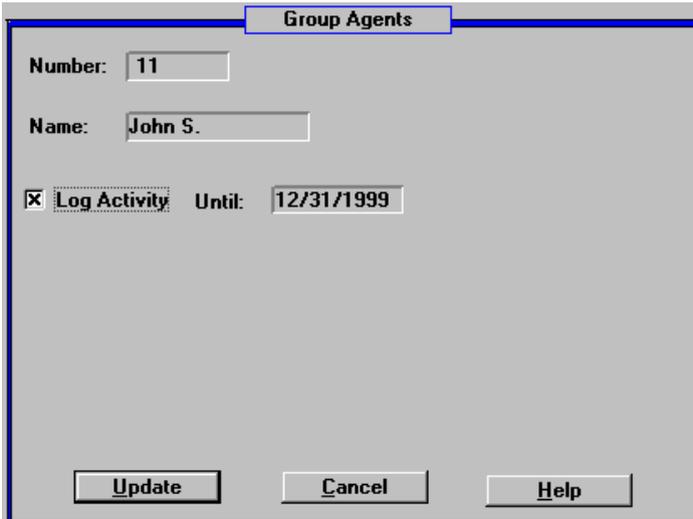
Adding Agents to the New Group

To add agents to the newly created agent group:

1. From the toolbar in the Administration application main screen, click the Groups icon.

Section 3: GETTING STARTED

2. From the list of groups at the left of the screen, select the newly created group.
3. Click the Group Agents push button.
4. From the Groups Agent Parameters screen that is displayed, click Insert.
The following screen is displayed for adding a new group agent.



The screenshot shows a dialog box titled "Group Agents". It contains the following fields and controls:

- Number:** A text box containing the value "11".
- Name:** A text box containing the value "John S.". The text "John S." is highlighted in blue.
- Log Activity:** A checkbox that is checked (indicated by an 'x' in a square).
- Until:** A text box containing the date "12/31/1999".
- Buttons:** Three buttons are located at the bottom: "Update", "Cancel", and "Help".

Figure 3-11: Adding a New Group Agent Screen

5. Fill in the required agent details in the appropriate fields and click Update to register the changes in the database.

The newly defined agent is added to the agent group.

NOTE

You can continue to add more agents to the group, by repeating the above procedure. Try to modify their details or delete an agent from the group. At any stage, if you need more information, refer to the context sensitive on-line help system.

3.4.2 The Real-Time Monitoring Application

The Real-Time Monitoring application allows you to obtain on-line statistical and graphic information concerning different Call Center activities. The information can be displayed in many different table and graphic formats, providing you with a clear picture of what is actually going on in the center.

Real-Time Monitoring Operations

This section describes how to create the following two types of real-time windows in the Real-Time Monitoring application:

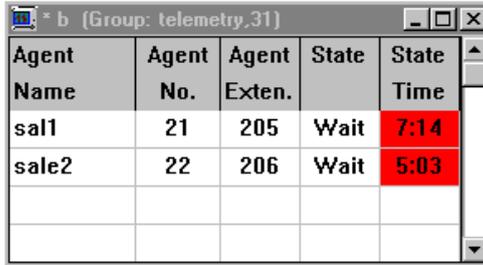
- **Group Status Window**, displaying the current activity of each agent in a selected group, and for how long the agent has been engaged in that activity.
- **Call Distribution Graph**, displaying graphical pie chart information about one group, such as the number of answered calls, number of abandoned calls, etc.

To create the Group Agent Status Window:

1. Double click on the Real-Time Monitoring icon in the *ACD IQ* Program Group (see Figure 3-3: The ACD IQ Login Window), to access the application and enter your login name and password in the Login window that opens.
The Real-Time Monitoring main screen opens.
2. From the File menu, select the New option to create a new real-time window.
3. In the New dialog box, double-click on the Group Agents Status template, or select the template and click OK.

Section 3: GETTING STARTED

4. In the New Group dialog box, double-click on the telemetry group to obtain information on this group. Information on the agents in this group is displayed in the window, as shown in the example in Figure 3-12.



Agent Name	Agent No.	Agent Exten.	State	State Time
sal1	21	205	Wait	7:14
sale2	22	206	Wait	5:03

Figure 3-12: Real-Time Group Agents Status Window

NOTE

Information displayed in the screen is constantly updated, according to activity in the Call Center.

5. Save the report using the Save As option from the File menu and assign it a name.

To create the Call Distribution Graph window

1. From the File menu, select the New option to create a new real-time window.
2. In the New dialog box, double-click on the Call Distribution Graphs template, or select the template and click OK.
3. In the New Group dialog box, double-click on the Service group to obtain information on this group.

- Information on the calls activity in this group is displayed in a window, as shown in the example in Figure 3-13 below.

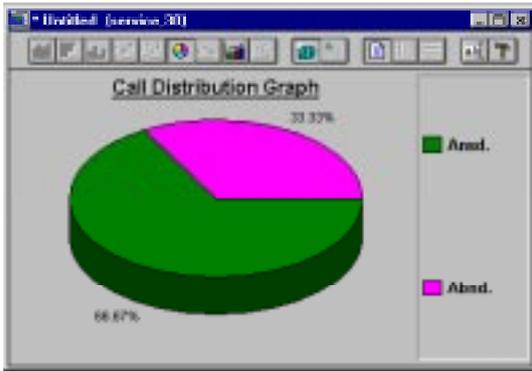


Figure 3-13: The Real-Time Call Distribution Graph Window

- After the window has been created with the information you requested, you can change the group presented in the report by selecting the Change option from the Contents menu.
- For information on a specific section of a pie chart, double-click on the desired section.
- To add/remove/change graphic entities in the graph, use the graphic toolbar.
- Save the report using the Save As option from the File menu.

3.4.3 The Historical Reports Application

The Historical Reports application allows you to view historical statistical information for analytical purposes. The application contains several factory report structures that can be filled out and generated. In addition, it also enables you to define your own report structures.

Historical Reports Operations

This section describes how to create the following two types of historical reports in the Historical Reports applica-

Section 3: GETTING STARTED

tion, and how to customize them according to your requirements.

- **The Agent Performance Report.** This report is based on one of the factory templates provided with *ACD IQ*. Using this report, you can analyze the performance of a specific agent over a specified period.
- **The Group by Date Report.** You can produce this report by basing it on an existing template and adding columns as required. Using this report you can analyze the performance of an entire group over a specified period.

To create the Agent Performance Report:

1. Double click on the Historical Reports icon in the *ACD IQ* Program Group (see Figure 3-3: The ACD IQ Login Window) to access the application and enter your login name and password in the Login window that opens. The Historical Reports main screen opens.
2. From the File menu, select the Open option. A list of factory templates is displayed.
3. From the list, select the first Agent Performance Report (RA1.1) and click OK. The Agent Performance Report Window is opened on the screen.
4. As you can see, the only parameter that is defined is the Requested by: parameter. You can now define the remaining parameters for the report.

NOTE

You must complete all the report parameters before generating the report.

5. Select the Parameters option from the Report menu, or click the right mouse button to the right of a parameter, and select the Parameters option. Fill in the parameters as shown in Figure 3-14.

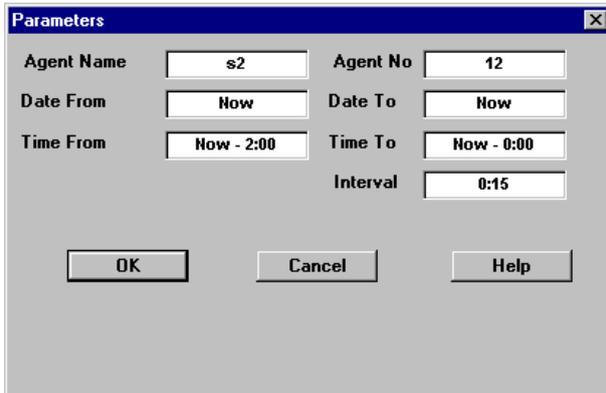


Figure 3-14: Parameters Dialog Box

6. To select/define a value for a parameter, click on the parameter field and enter the value, as required.
7. When you have finished, click OK. The report template should now look as shown in Figure 3-15 below.

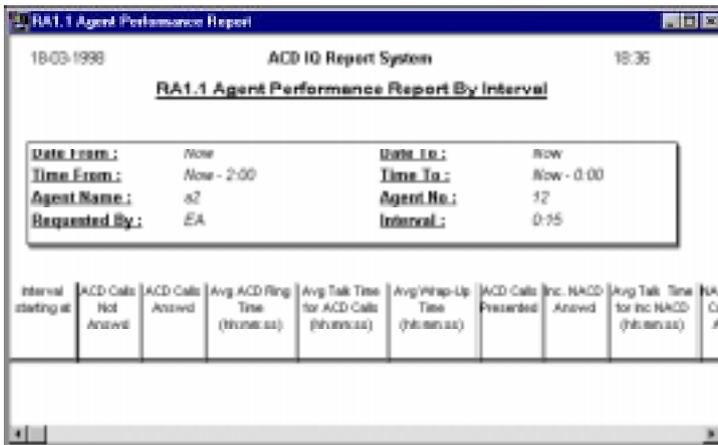


Figure 3-15: The Agent Performance Report Template

Section 3: GETTING STARTED

8. Save the report under the name Agent-11 using the Save as option in the File menu.
You are now ready to generate the report and see the result on the screen.

To generate the Agent Performance Report:

1. Click the Generate button or select the Generate option from the Report menu.
2. After a few seconds, the generated report is presented in a new window on the screen, as displayed in Figure 3-16 below. (For a better view, maximize the window.)

Report Item: RA1 Agent Performance Report
18-03-1998 A/CB 10 Report System 18:04

RA1 Agent Performance Report By Interval

Date From: 18-03-1998 Date To: 18-03-1998
Time From: 5:00pm Time To: 7:00pm
Agent Name: s2 Agent No: 52
Requested By: CA Interval: 0:15

Interval starting at	In-Call Account	Out-Call Account	Present	In-Call Account	Out-Call by Agent	% of the Agent
17:15	0	0	0	0	0	0
17:30	0	0	0	0	0	0
17:45	0	0	0	0	0	0
18:00	0	0	0	0	0	0
18:15	1	2	3	1	1	7
18:30	0	0	0	1	0	0
18:45	0	0	0	0	0	0

Company: Page 1 of 1

Figure 3-16: The Generated Agent Performance Report

Note that the report displays the performance of agent Agent s2 between the hours specified (05:00 pm - 07:00 pm). The report contains one line for each interval period (every 15 minutes).

3. Go to the end of the report using the scroll bars. At the end of the report, you will see the sum total of the data presented in the report.
4. You can now print the report using the Print option from the File menu (or the Print icon).

5. You may want to experiment by returning to the report template and scheduling the report for printing at a later time, using the Schedule option. For more information, refer to the *ACD IQ* context sensitive on-line help.

To create the Group by Date Report:

1. From the File menu, select the New option. A list of templates is displayed.
2. From the list, select the Group by Date template (1.2) and click OK.

The Group by Date Window is displayed.

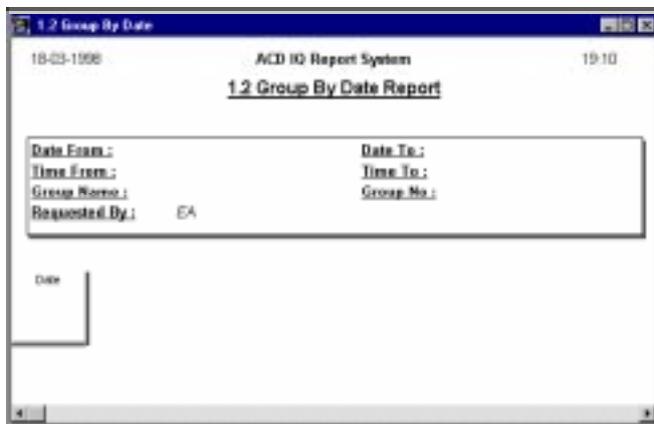


Figure 3-17: Group By Date Window

As you can see, this template currently contains only one column - Date. In order to produce our report we will customize this template by adding columns to provide us with more information on the group performance.

3. Click the right mouse button to the right of the current column in the report, and select the Insert Column option.
4. From the Add New Column dialog box, select the following columns to add. After selecting each column, click the Add Column button to add it to the report:

Section 3: GETTING STARTED

Column Name	Description
Total Calls	Total number of calls.
Total Calls Abndn.	Total number of abandoned ACD calls.
ACD Calls answered	Number of ACD calls answered.
Agent RPH	Average number of calls per hour answered by the group.
Cmltv. Wait Time on Que (hh:mm:ss)	Accumulated waiting time in queue.

- Next, fill in the report parameters with relevant dates and times. Note that in order to produce a meaningful report, the system must have been running for the specified period of time. An example of dates and times is displayed below:

Date From: Now - 4 (i.e., Current date - 4 days)
 Date To: Now (i.e., Current Date)
 Time From: 08:00 am
 Time To: 08:00 pm
 Group Name: Service
 Group No: 30
 Requested By: EA

- For this data, your report should now look as follows:

Date	Total Calls	Total Calls Abnd	ACD Calls Answered	Agent RPH	Cmltv. Wait Time on Que (hh:mm:ss)

Figure 3-18: The Group by Date Report Template

7. You may save the template, if you want, under a new name, using the Save As option.
8. Finally, generate the report and view the results.

NOTE

Generated reports are shown on a new static window which reflects the results of the required report. Any change to the layout of the template or the parameters of the report requires regeneration of the report and are reflected on a new static windows.

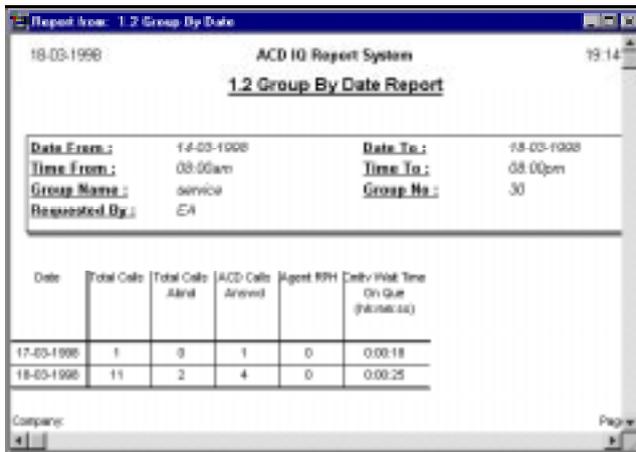


Figure 3-19: The Group by Date Generated Report

3.4.4 The Wall Board Administration

The Wall Board Administration enables the supervisor to control the messages displayed on wall board. The application enables you to edit your own messages. Any message may include free text, statistical parameter, updated on line, or any combination of them. It enables you to define the scenario, which is the sequence of the messages.

Wall Board Administration Operations

This section describes how to define your physical Wall Board, how to create your message library and how to build your messages scenario for your Wall Board.

To define a new physical Wall Board

1. Double click on the Wall Board Administration icon in the *ACD IQ Program Group* (see Figure 3-3: The ACD IQ Login Window) to access the application and enter your login name and password in the Login window that opens.
2. Click on the Wall Board speed button.
3. Click the New button. Give your Wall Board a name and address. Select the Wall Board type and choose the communication parameters.
4. Remember to click the Save button to save the new Wall Board.

To create a new message in the Message Library:

1. Click on the Message Editor speed button.
The Messages Editor screen of the Wall Board Administration opens, as displayed below.



Figure 3-20: The Wall Board Messages Editor Screen

2. Click the New button. Give the new message a name.

Define the default group and use the editor to edit your message.

3. Click the Param button to insert a parameter for the message.

The following dialog box opens.

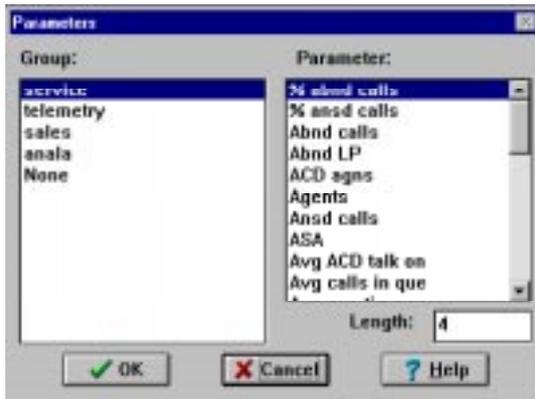


Figure 3-21: Parameters Dialog Box

4. Select the required parameter, define its length (optional). Click the OK button to accept the new parameter. Click the Cancel button to cancel the operation.
5. In the Message Editor screen, remember to click the Update button to save the new message.

To build a scenario for the physical Wall Board:

1. Click on the Wall Board speed button. Pick the message you want to add to the scenario from the message library and click the Add button.

The following dialog box opens.

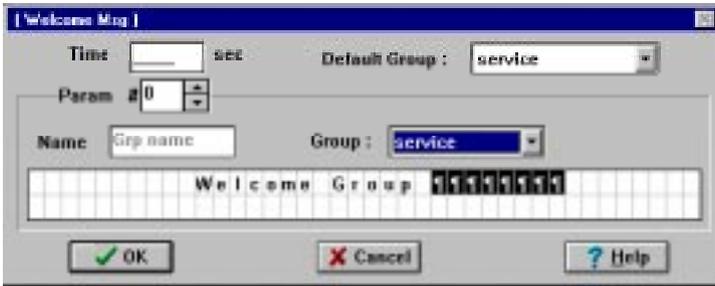


Figure 3-22: Add Welcome Message to Scenario Dialog Box

2. Define the time, in seconds, this message should stay on the Wall Board. Click OK to actually add the message to the scenario, or Cancel to cancel this operation.
3. You may use the upper/lower arrow buttons to rearrange the messages order in the scenario.
4. Click the Run button at the left side of the screen to accept your new scenario.

3.4.5 Summary

This section showed you how easy it is to perform basic operations in each of the *ACD IQ* applications. As you can see, *ACD IQ* is easy to learn and simple to master. We hope that you find the system to be a useful tool in helping you monitor call distribution in your Call Center.

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Section 4

TROUBLESHOOTING

This chapter contains a list of problems that might occur during the course of the installation process. For each problem, an explanation and a solution to the problem are presented.

In the list that follows, the following key is used:

P = Problem

E = Explanation

S = Solution

P: *The ACD IQ Server does not come up (i.e., the logo is not shown).*

E: After installation, the *ACD IQ* server machine needs to be rebooted for all changes to take effect. The security plug should be connected to the parallel port (LPT1). After a power fail, there is an inconsistency on the database updates.

S: Shutdown and reboot the server. Check that the security plug is connected to the parallel port.

Change the name of the file \ACDIQ\DB\ECC.LOG and restart the ACDIQ Server. If the problem persists call technical support.

P: *The client applications refuse to run in a network environment.*

E: There are several possible explanations:

- (1) The *ACD IQ* server is not running.
- (2) There is a problem with the network.

- (3) The IP addresses or workstations names are not set correctly.
- (4) The server has been restarted.
- S:** (1) Check that the server is up and running.
- (2) Check that the client station can connect with the server; or other workstations on the network use the PING facility to test basic IP functionality (by number and name).
- (3) Check that the addresses and the workstations names set for the client and server are correct (the addresses which work correctly for PING).
- (4) Exit and restart Windows after the server has come up.

P: *After installation, the client applications refuse to give the user access (i.e., logins fail).*

E: If you have an empty database, there are no authorized users.

S: Run the *ACD IQ* administration application, login as user 'EA' with password 'E1996'. Create new supervisors who can then login and run the applications for which they have access rights. See Section 3.3.

P: *There seems to be no communication with the PBX.*

E: The communications parameters are not defined properly.

Physical connections problems.

The phone station wired to the ACD IQ server is not connected or not properly defined on the PBX.

S: Make sure that:

The correct COM port is set for the PBX. And that this is NOT the same COM port defined for the Wall Board.

The cables to the phone station are connected and work.

The phone station is defined on the PBX and connected to the COM1 port.

Appendix A

PC for project ACD I.Q.

Specification Requirements

1. Processor: 586 (PENTIUM), 200MHz minimum
2. RAM : 64 Mb Min
3. AC input:
 - * 220 / 110 Vac, 50/60 Hz .
4. IDE Hard Disk:
 - * Capacity - 2 Gb minimum
 - * Faster than 10 msec
 - * MTBF - more than 45000 hours.
5. CACHE Memory : 256 kb minimum.
6. Floppy Disk Driver : 3.5 ", 1.44 Mb.
7. CD-ROM drive
8. Slots:
 - * PSI - 3 slots minimum
 - * ISA - full 4 slots.
9. Power Supply : 200 W minimum.
10. Screen card: MACH 64 with 2Mb memory or equivalent.
11. Screen: SVGA 15 " (17" Recommended)
12. Ports :
 - * Serial - 3
 - * Parallel - 1.

76-110-0675/F, Issue 1

13. Keyboard : WIN 95 compatible English
14. Mouse : Bus Mouse.
15. Modem card: 33.6 kb/s, Hayes compatible. Communication port: COM3 with interrupt #5.
16. Real Time Clock with battery back-up.
17. Networking card: 3COM59X-TPO,(3COM900 in the future).
18. Operating systems : WINDOW NT 4.0 workstation with documentation and certificates installed in the PC.

NOTE

For more than 10 net connections, WINDOWS NT Server is required !

19. The PC shall be approved : CE FCC UL.
20. NT supported:
 - a.ANTIVIRUS software installed on the PC
 - b.PC ANYWHERE software package for win NT/95/3.1 by Symantec Corporation Vers.8.0 or higher.
21. Any power down (including momentary) shall cause a reset and normal work of the PC.

Telrad

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Release 6

Issue 1