



# **EPICAgent**

# **User Guide**

**Version 4.0x**

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## *PREFACE*

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### **About this Guide**

This guide describes how to use the EPICAgent Application . It is meant for the Contact Center administrators and agents. It details the components that comprise the system and explains how to use the application.

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**Notes:** For hands-on information regarding the EPICAgent application, please refer to the Online Help. For a description of many of the EPICAgent concepts and terms used in this guide, refer to the Glossary at the end of this document.

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### **Documentation**

The following documents are available for the EPICCenter System:

1. **EPICAgent - User's Manual**
2. **The context sensitive On-Line HELP**
3. **EPICCenter Administrator's Guide**
4. **EPICVisor - User's Manual**
5. **EPICCenter Installation and Getting Started Guide**
6. **Integration with CRM applications - Reference Guide**



## Typographical Conventions in this Guide

Various typographical conventions are used throughout this guide to help you follow the text. The following formats 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.
<i>Italic font</i>	Words that appear <i>in italics</i> indicate cross-references to other sections or figures within the Guide.
<b>Note:</b>	Important notes are preceded by the word “ <b>Note:</b> ” presented in bold typeface, with lines above and below.
<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, i.e. the <Enter> key.



## Disclaimer

The illustrations and other views, telephone displays or screen captures appearing in this manual are examples used to explain more clearly how the features and controls are used. Therefore, what appears on the display or screen capture in the illustrations may differ from what appears on the actual equipment, and some of the illustrations may represent something impossible in actual operation. The functions that can be used and the information that can be displayed will differ depending on the telephony state and external equipment being connected. The names of companies, products, people, characters, and/or data mentioned in the examples herein are fictitious and are in no way intended to represent any real individual, company, product, or event, unless otherwise noted.



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## CHAPTER 1

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### EPICAgent Overview

The EPICAgent is a powerful, yet easy-to-use software application with a rich set of telephony capabilities (such as, Answer Call, Hold Call, Transfer Call), as well as specific ACD capabilities (such as Call Results, Queued Calls List and Queued Calls Pickup).

The application works together with the EPICCenter's EPICVisor and EPICEngine modules to enable the agent to maximize performance in the Call Center environment.

The EPICAgent application has a library of services that enable the application to integrate with the organization's existing services and database using a Windows DDE interface. This allows information to be shared between the systems whenever an ACD call is handled.

The application comprises a customizable toolbar, which provides quick access to frequently performed telephony operations, and application windows.

Some of the EPICAgent application's features are:

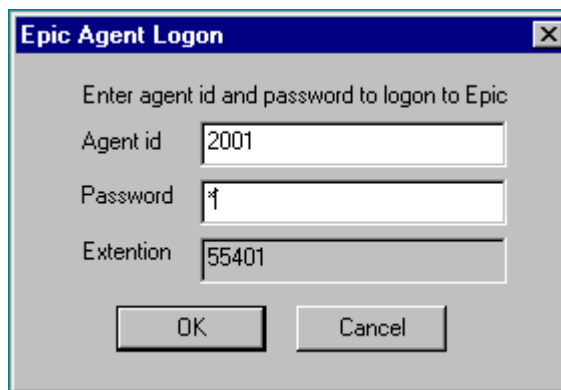
- Administrators can customize the application, e.g. by adding more buttons to the toolbar or by creating shortcut keys to telephony operations.
- Telephony functions can be assigned to an almost unlimited number of programmable buttons (soft keys).
- The status of all calls that are waiting for the agent can be viewed.
- A log of calls that were ringing or answered by the agent can be maintained.
- Agents can view a list of calls waiting in the queue for them. The list updates dynamically and reflects the current situation in the queue. The agent may use the wrap-up time to decide if a call is of special interest and pick it up directly from the queue.

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## CHAPTER 2

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### To Invoke the EPICAgent Application



**Figure 2-1 The EPICAgent logon window**

From the Windows Start Menu select Programs, EPICAgent Program Menu and double-click on the



EPICAgent Application icon. EPICAgent

A logon dialog box appears, prompting you to specify your agent ID and password (The third parameter, the agent extension, is usually defined once during the first logon. In some environments, such as thin terminals, there is no way to save this parameter internally, requiring the agent to fill it in).

If you are authorized, the EPICAgent Application Toolbar will open, enabling you to access the application.

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**Note :** Pay extra attention to the details keyed in to the EPICAgent Logon window. Entering the correct Agent id and password as received from the System Administrator will prevent confusion between agents and extensions.

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## The EPICAgent Application Toolbar

The EPICAgent Application Toolbar is displayed once you have successfully logged on to the application. It contains buttons that provide quick access to frequently used operations and application windows. See *CHAPTER 3 – Customizing the EPICAgent Application Toolbar* for more information.



Figure 2-2 A typical EPICAgent toolbar

The toolbar enables you to perform all telephony and ACD operations from your desktop in a single click of a button. It also provides access to special features of the EPICAgent Application, such as the Calls Log Window.

The status line at the bottom of the toolbar provides information about current activities, e.g. when there is an incoming call it displays information about the source and destination of the call. The status bar also changes color to give you a visual indication of the current activity, e.g. when there is an incoming call the bar turns yellow.

There are five types of operations you can perform from the toolbar:

- Telephony Operations
- ACD Operations
- Access EPICAgent Windows
- Additional Operations
- Internet






## Telephony Operations




The buttons listed below can be used in the EPICAgent Application Toolbar to perform a number of telephony operations.







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Note: See *CHAPTER 3 Customizing the EPICAgent Application Toolbar* for more information on buttons and their functions. Some buttons request additional information, via a dialog box to complete their operation. See *CHAPTER 5 Dialog Boxes* for more information.

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Icon	Button Name	Action	Details
	Make Call	Makes a call to a destination	The system dials the destination number defined in the <i>Call Destination dialog box</i>
	Answer	Answers an incoming call	When a call rings, this button becomes active and blinks. When the call is answered or hung up by the caller, the button becomes inactive and stops blinking.
	HangUp	Ends the active call	
	Swap Calls	Swaps the active call with the call that was waiting on hold	
	Start Transfer	Starts the transfer procedure	<ol style="list-style-type: none"> <li>1. The Start Transfer dialog box opens.</li> <li>2. Enter the destination number to transfer the call to and click OK.</li> <li>3. The system puts the current call on hold, and dials the number you entered. Once answered, you are able to talk to the person you called before completing the transfer.</li> <li>4. To complete the transfer, click the <b>complete transfer</b> button.</li> </ol> <hr/> <p><b>Note:</b> You can assign a specific number to each Start Transfer button on your toolbar. This enables you to transfer calls to pre-defined numbers without having to enter the number each time you use the button. (See <i>CHAPTER 3 Customizing the EPICAgent Application Toolbar</i>)</p> <hr/>

Icon	Button Name	Action	Details
	Single Step Transfer	Invokes the Start Transfer procedure but eliminates the need to use the Complete Transfer button	<ol style="list-style-type: none"> <li>1. The Single Step Transfer Destination Dialog box opens.</li> <li>2. Enter the destination number and click OK.</li> <li>3. The system connects the caller directly to the destination and disconnects you.</li> </ol> <hr/> <p><b>Note:</b> You can assign a specific number to each Single Step Transfer button on your toolbar. This enables you to transfer calls to pre-defined numbers without having to enter the number each time you use the button. (See <i>CHAPTER 3 Customizing the EPICAgent Application Toolbar</i>)</p> <hr/>
	Complete Transfer	Completes the transfer procedure	<p>The system transfers the original caller to the destination number, i.e., the original caller and the destination number are now connected.</p>
	Start Conference	Starts the conference call procedure	<ol style="list-style-type: none"> <li>1. The Start Conference dialog box opens.</li> <li>2. Enter the destination number to conference the call to and click OK</li> <li>3. The system puts the current call on hold, and dials the number you entered. Once answered, you are able to talk to the person you called before completing the conference call.</li> <li>4. To complete the conference call, click the complete conference button.</li> </ol> <hr/> <p><b>Note:</b> You can assign a specific number to each Start Conference button on your toolbar. This enables you to connect calls to pre-defined numbers without having to enter the number each time you use the button. (See <i>CHAPTER 3 Customizing the EPICAgent Application Toolbar</i>)</p> <hr/>






Icon	Button Name	Action	Details
	Complete Conference	Completes the conference procedure	The system connects the three members in a conference call.
	Divert Call	Diverts an incoming call to the number defined in the <i>Divert Call Destination dialog box</i>	<ol style="list-style-type: none"> <li>1. The system opens the Divert Call Destination dialog box.</li> <li>2. Enter the number that you want to divert your call to and click OK.</li> </ol> <hr/> <p><b>Note:</b> You can assign a specific number to each Divert Call button on your toolbar. This enables you to divert calls to pre-defined numbers without having to enter the number each time you use the button. (See <i>CHAPTER 3 Customizing the EPICAgent Application Toolbar</i>)</p> <hr/>
	Hold	Puts a call on hold	
	Retrieve	Retrieves a call from hold	
	Reconnect	Disconnects the active call and reconnects the call on hold	
	Agent Busy yes/no	Toggles the agent state between busy and not busy	<hr/> <p><b>Note:</b> This button is designated for systems incapable of identifying the agent's state. The agent must click the relevant button to notify the system if the extension is busy or not busy.</p> <hr/>








Icon	Button Name	Action	Details
	Callback Indication - busy	To reinsert a busy call for call back	<b>Note:</b> This button is designated for systems incapable of analyzing tones. The outbound call is transferred to an agent, who decides how the call should be handled.
	Callback Indication - no answer	To reinsert an unanswered call for call back.	<b>Note:</b> This button is designated for systems incapable of analyzing tones. The outbound call is transferred to an agent, who decides how the call should be handled.
	Callback Indication - terminate	To reinsert a terminated call for call back	<b>Note:</b> This button is designated for systems incapable of analyzing tones. The outbound call is transferred to an agent, who decides how the call should be handled.

**Table 2-1 The available telephony operations**

## ACD Operations

The buttons listed below can be used in the EPICAgent Application Toolbar to perform a number of ACD operations. See chapter 3 *Customizing the EPICAgent Application Toolbar* for more information.

Icon	Button Name	Action	Details
	Login Primary Groups	Performs login to the Primary Groups:	Note: The icon on this button changes according to the state between: Login (green) and Logout (red). When in Login state pressing the button changes the icon to Logout and vice-versa.
	Logout Primary Groups	Performs logout from the Primary Groups:	Note: The icon on this button changes according to the state between: Login (green) and Logout (red). When in Login state pressing the button changes the icon to Logout and vice-versa.
	Login Specific Group	Performs login to a specific ACD Group:	If this button is pre-programmed with a specific group, you are logged into that group and the icon on the button changes to the Logout ACD Group icon. If this button is not pre-programmed with a group, the Login Group dialog box opens, which enables you to select the ACD group that you want to login to.
	Logout Specific Group	Performs logout from a specific ACD Group:	If this button is pre-programmed with a specific group, you are logged out of that group and the icon on the button changes to the Login ACD Group icon. If this button is not pre-programmed with a group, the Logout Group dialog box opens, which enables you to select the ACD group that you want to logout from.
	Groups Manager	Manages the list of Login/Logout groups	The Groups Manager dialog box opens.









Icon	Button Name	Action	Details
	Release	Sets the station to Release state:	<p>In Release state, the EPICAgent will not route ACD calls to your phone. You may still receive calls through transfer from another agent or private calls.</p> <hr/> <p>Note: The icon on this button changes according to the state between: Release (red) and Resume (green). When in Release state, pressing the button changes the icon changes to Resume and vice-versa.</p>
	Resume	Returns the station to normal ACD mode (When in Release state):	<hr/> <p>Note: The icon on this button changes according to the state between: Release (red) and Resume (green). When in Release state, pressing the button changes the icon changes to Resume and vice-versa.</p>
	Wrap-Up Code	Enables entering a Wrap-Up code:	The Wrap-Up Code dialog box opens. Select the appropriate Wrap-Up code from the drop-down list and click OK.
	Controlled Wrap-Up Code	Enables control/extend of the Wrap-Up period (When the automatic Wrap-Up time is not sufficient):	When you are ready to take more calls, click the Ready button.
	Ready	Terminates Wrap-Up state and makes the agent available to receive calls	
	Transfer to Agent	Transfers a call to another ACD agent (using the agent ID):	The Transfer to Agent dialog box opens. Select the appropriate agent (by agent ID) from the drop-down list and click OK to transfer the call to that agent.
	Help	Sends a help request to the Supervisor:	This button alerts the Supervisor that you need assistance. It toggles between On and Off.

**Table 2-2 The available ACD operations**



## Window Operations

The buttons listed below can be used in the EPICAgent Application Toolbar to perform window operations. See *CHAPTER 4 Windows* for more information.

Icon	Button Name	Action
	Calls Log	Opens the Calls Log Window
	Calls Status	Opens the Calls Status Window
	ACD Calls	Opens the ACD Calls Window
	EPICAgent Setup	Opens the Setup Window
	Telephony	Opens the Telephony Window
	Exit	Exits the EPICAgent Application
	Help	Opens the EPICAgent Online Help
	About	Opens the About dialog box with details about the current software version

**Table 2-3 The available Windows**

## Other Operations

The buttons listed below can be used in the EPICAgent Application Toolbar to perform a number of other operations.




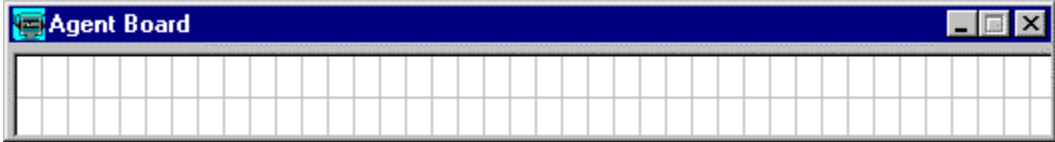







Icon	Button Name	Action
	Run	Runs an external application. The system executes the specified application <hr/> Note : Specifying a full path for the application will ensure its execution. <hr/>
	Set up an IP Call via NetMeeting	Active only during a chat call.
	Agent Board	Displays messages defined by the Wall Board administrator (See <i>EPICVisor - User's Manual</i> for more details)
		

Table 2-4 The available Other Operations

## EPICAgent Internet Chat Calls

An Internet Chat Call is indicated in the toolbar by the flashing Answer Call button. When the Chat Call is answered a Chat Application window is displayed on the Agent's screen and a similar window on the caller's browser. The Agent will also see the URL/Internet page that is shown to the customer.

In the Chat Application window on the Agent's screen, the following buttons and areas are displayed:

Icon	Button Name	Action
	Chat Responses	Activates the Chat Responses Tree. Active only during a chat call.
	Send Text	Send the text that is typed in the text area to the caller and add it to the transcript area.
	Send URL	Send the URL, as typed in the text area, to the caller. The URL specification will be added to the transcript area and the agent browser will show the URL page.
	Suspend Link	Enable the agent to browse and change internet pages without affecting the customers screen e.g. to browse through the company's price list without the customer seeing.
	Restore Link (Customer)	Restore a suspended link so that the agent's browser will display the page that is currently seen by the customer.
	Restore Link (Agent)	Restore a suspended link so that the customer's browser will display the page that is currently seen by the agent.
	Browsing Status	Indicate whether the link is suspended (Suspended Link) or active (Restore Link with customer).

**Table 2-5 The EPICAgent Chat calls capabilities**

Area	Details
Transcript area	Shows a detailed transcript of the ongoing Chat Call, each line is preceded by the name of the active party. Text is displayed exactly as it is typed and internet pages are shown as URL addresses. Note: When the call is completed it is possible to send a copy of the transcript to the caller. It is also saved in the system.

Text area	Text messages and URL addresses should be typed in this area.
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## CHAPTER 3

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### Customizing the EPICAgent Application Toolbar

Administrators can customize the EPICAgent Application Toolbar to suit the agent's requirements, by adding and removing buttons. There is no limit to the amount of buttons that can be added and the same one may appear more than once. For example, if your Toolbar contains three divert call buttons, you can allocate three destination numbers to which calls can be diverted. *See CHAPTER 5, Dialog Boxes* for more information.

#### The Setup Window Toolbar Tab

The Toolbar tab of the Setup window enables you to customize the EPICAgent Application toolbar. Here you can view all available buttons with a description of their functionality, and select which ones you want to add to your toolbar.

#### To Access the Setup Window Toolbar Tab:

Click the EPICAgent Setup button  in the EPICAgent Application Toolbar. This button can also be located in the window category of the Epic Agent Setup. Click the Toolbar tab at the top of the Setup Window, to bring this page forward:

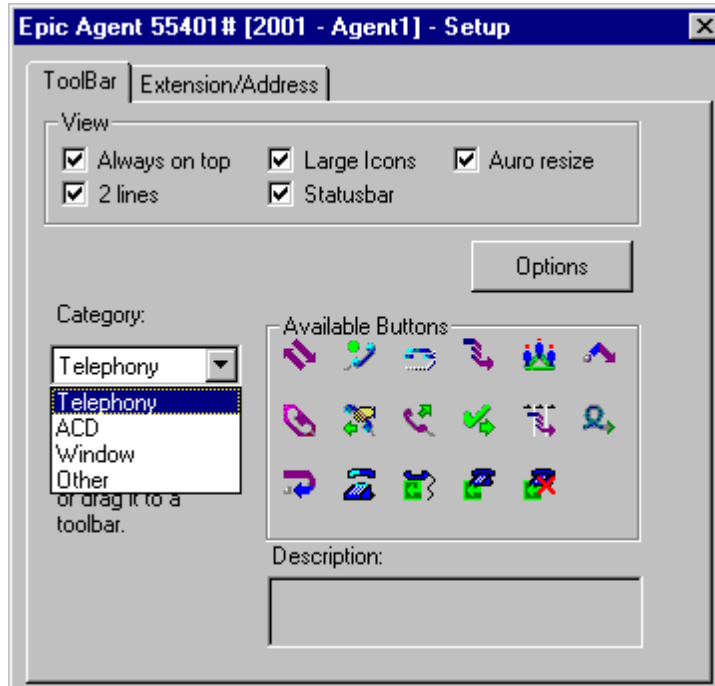


Figure 3-1 The EPICAgent toolbar configuration window

The View area at the top of the window enables you to define the behavior of the toolbar - whether or not it stays on top of all other running applications, and whether the buttons on the EPICAgent Toolbar are displayed in one or two lines.

Use the Category area at the bottom left of the window to select which category you would like to view (Telephony, ACD, Window or Other). Each category displays a series of available buttons that can be added to your agent toolbar using the drag and drop method. A brief description of the selected button is displayed in the bottom of the window .

**To View the Functionality of a Button:**

Select the required category (Telephony, Window, ACD or Other) and click on the button to see a description of its functionality.

**To Keep the Toolbar on Top of Any Running Application:**

Check the Always on top check box.

**To Enable Two Lines of Buttons in the Toolbar:**

Check the 2 lines check box.

**To View Large Icons on the Toolbar:**

Check the Large Icons check box.



### **To View the Status Bar at the Bottom of the Toolbar:**

Check the **Statusbar** check box. When this check box is selected, the status bar appears under the toolbar and gives textual information about the active call. The information displayed by the status bar can be configured by changing the parameters in the Call Status Window.

### **To Enable the Auto Resize Toolbar Option:**

Check the **Auto resize** check box. When this check box is selected, the toolbar automatically resizes to fit the number of icons in the toolbar.

### **To Add a Button to the Toolbar:**

1. Select the required category (Telephony, ACD, Window or Other) and click on the button that you want to add.
2. Drag and drop the button to the required position in the EPICAgent toolbar.
1. If the button has parameters attached, the relevant dialog box opens (i.e. the Call Destination dialog box. *See CHAPTER 5 Dialog Boxes* for more information).
2. Enter the required information (e.g. the number that you want to dial using this **Call** button) and click OK.

### **To Delete a Button From the Toolbar:**

Press <Shift> on the keyboard and drag the button off the toolbar.

### **To View/Edit the Parameters of a Button:**

1. Right-click on the button.
2. The Call Destination dialog box opens (*see CHAPTER 5 Dialog Boxes* for more information).
3. Change the information as required and click OK.



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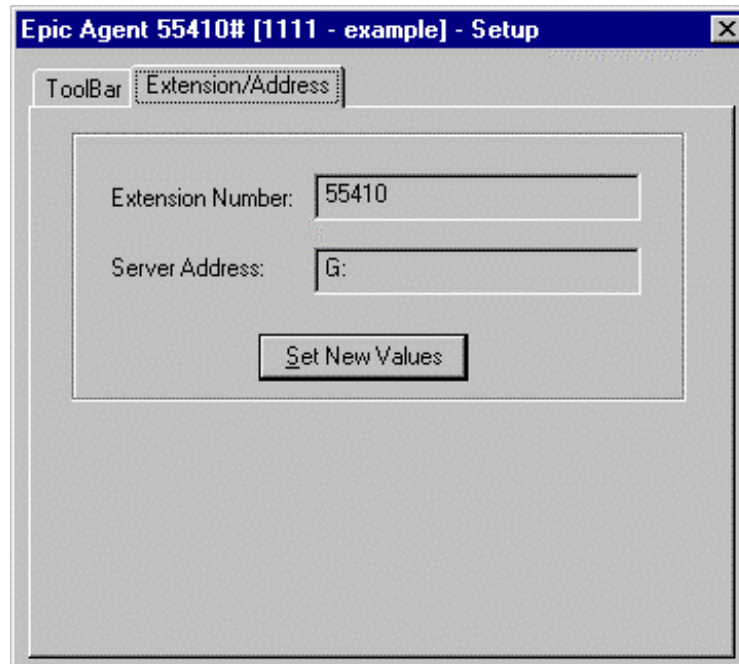
## CHAPTER 4

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### Windows

#### The Setup Window Extension/Address Tab

The Extension/Address tab of the Setup window enables you to define the extension number of your station and the server address. The server address is a mapped network drive to a shared directory in the server computer.




**Figure 4-1**The Extension/Address tab of the setup window

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Note: You should receive the information for this setup window from your administrator, and pay extra attention to key it in correctly.

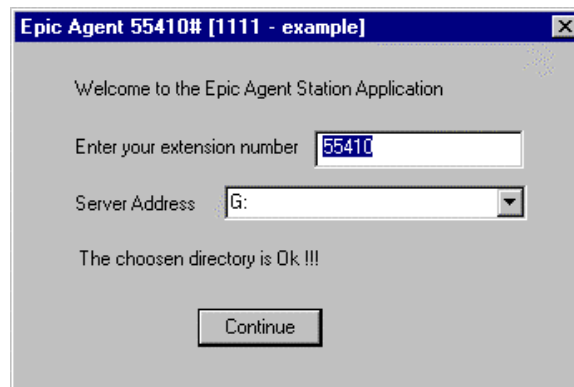
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### To Access the Setup Extension/Address Tab:

1. Click the Setup button  in the EPICAgent Application Toolbar. This button can also be located in the Window category of the EPICAgent Setup.
2. Click the Extension/Address tab at the top of the Setup Window, to bring this page forward.

### To Define the Extension Number and/or Server Address:

1. Click the Set New Values button to open the Set Extension & Address dialog box.
2. Enter your extension number and server address in the dialog box. If required, use the drop down list to select the server address.
3. Click Continue to assign the new values. The new values will take effect on the next logon.



### The Calls Log Window

The Calls Log window displays a record of all calls that were handled during the current logon time. You can view the properties of any event in this window and attach notes to the record, for example, to remind yourself to follow up on this call. You can delete an individual record from the list, or clear the whole log.

### To Access the Calls Log Window:

Click the Calls Log button  in the EPICAgent Application Toolbar. This button can also be located in the Window category of the EPICAgent Setup.

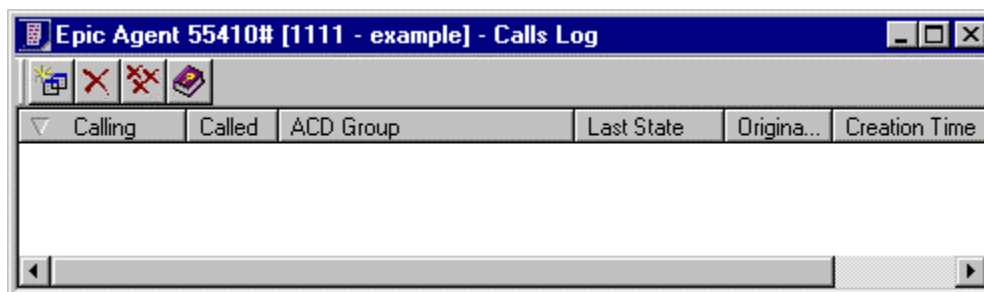


Figure 4-2 The calls log window

Information in the Calls Log window is displayed in column format, enabling you to sort the records according to specific information, i.e. ACD Group, Last State etc. The following columns are available

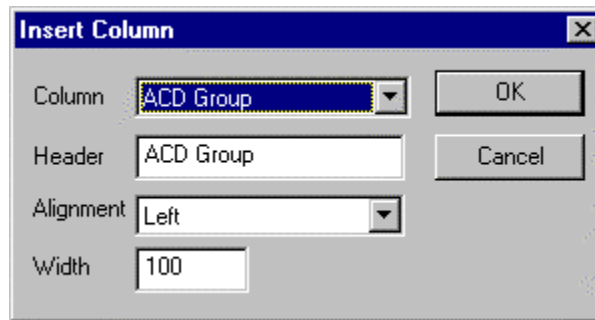
<b>Column Name</b>	<b>Description</b>
ACD Group	The ACD group through which the agent received the call.
Called	The Agent device.
Calling	The caller ID (where available)
Creation Time	Time call entered the system
Deletion Time	Time that call ended
Last Redirection	The last point from which the call was routed (e.g., if the call is an ACD call that was routed to the agent from the IVR, the dial number of the IVR port is the last redirection).
Last State	What the last state of the call was (e.g. hold)
Originally Called	The number dialled by the caller (e.g., if the call is an ACD call this is the IRN).
Trunk	The trunk on which the call entered

**Table 4-1 The available columns for the Call Logs Window**

In the Calls Log window, you can perform the following procedures:

### Insert a Column:

1. Right-click inside one of the column headings in the Calls Log window and select **Insert Column** from the pop-up menu. The insert Column dialog box opens.
2. From the drop-down list, select the column you would like to insert.
3. The **Header** is the title name that will appear on the column. Editable.
4. The **Alignment** determines the position of the text. (Left/Center /Right)
5. Adjust the **width** if required.



---

Note: You may change the width manually by dragging column sides to the desired position

---

### Delete a Column:

Right-click on the column that you want to delete and select **Delete Column** from the pop-up menu.

### View the Properties of a Call:

Right-click on the required call in the Calls Log Window and select **Properties** from the pop-up menu.

### Add a Note to a Call:

Right-click on the required call in the Calls Log Window and select **Properties** from the pop-up menu. The Calls Properties dialog box opens, which enables you to enter a note to accompany the selected call.

### Sort the Records According to one of the Column Headings:

Click on the required column heading.

The list will be sorted according to the selected field . Selecting the same column again will cause the sort order to toggle between ascending and descending.

### Delete a Call:

Right-click on the required call in the Calls Log Window and select **Delete** from the pop-up menu.

### Clear all Records From the Log:

Right-click in the Calls Log window and select **Clear Log** from the pop-up menu.

## The Calls Status Window

The Calls Status window shows the status of all calls that are currently waiting on your phone. You can view the properties of any call listed in this window.

### To Access the Calls Status Window:

Click the Calls Status button  in the EPICAgent Application Toolbar. This button can also be located in the Window category of the EPICAgent Setup.

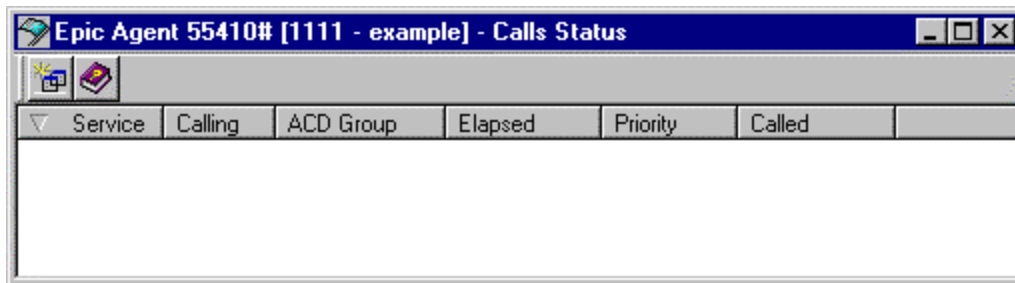


Figure 4-3 The call status window

Information in the Calls Status window is displayed in column format, enabling you to sort the records according to a specific field. Most of the columns are textual except for the call type and the call media that display icons that represent the call type and media according to the followings:







Icon	Description
	A call back call as consequence of abandoned call
	An incoming ACD call
	An outbound call as consequence of call back request.
	An outbound call as consequence of Web call back request.
	A voice call
	A chat call.

Table 4-2 The Call Type and Call Media icons

The Columns displayed in the Calls Status window above are only an example. You can use any of the following columns: The selected columns will also be displayed in the status bar that show the active call.

<b>Column Name</b>	<b>Description</b>
ACD Group	The ACD group through which the agent received the call
Called	Destination number dialled by the caller
Calling	The caller ID (where available)
Elapsed	The running time since the call began
Last Redirection	The last point from which the call was routed
Originally Called	The number dialled by the caller
Status	Current status
Trunk	On which trunk the call entered
Waiting Time	How long the calls has been waiting.
Type	The call type (incoming or outgoing).
Media	The media of the call (voice or chat).
<b>Call Profile Fields</b>	
Date	Date the call entered
Time	Time the call entered
Agent Extension	The extension number of the agent's station
Agent Number	The agent number
Agent PSW	The agent password
Average Queue Time	Average time a call spends in queue
Callback Dest.	For a call back call, this is the dial number to call
Callback time	For a call back call, this is the time to dial.
Customer Name	Taken from the site's database – where available.
Customer Number	Taken from the site's database – where available.
DNIS	The number on which the call entered the system
Language	The language in which the call is handled
Media	The media of the call (voice or chat).
Priority	The level of importance of a call
Queue Position	Where the call is positioned in a queue
Session ID	For chat call, this number is the session ID used by the WEB server. This number is for internal use only.
Service	Service required by the call
User Fields	The list of user defined call profile fields as defined in the system section of the administration.
Skills	The list of skills as defined in the system section of the administration.

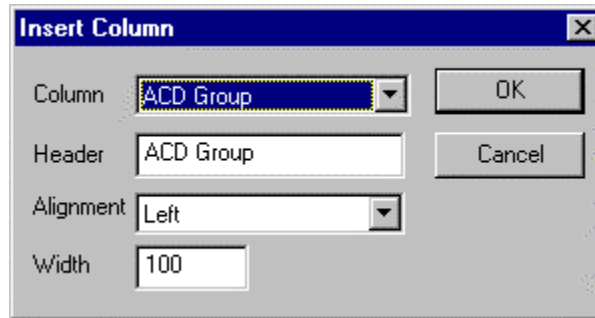
**Table 4-3 The available columns for the Call Status window**



In the Calls Status window, you can perform the following procedures:

### Insert a Column:

1. Right-click inside the one of the column headings in the Calls Status window and select **Insert Column** from the pop-up menu. The insert Column dialog box opens.
2. From the drop-down list, select the column you would like to insert.
3. The Header is the title name that will appear on the column.
4. The Alignment determines the position of the text.
5. Adjust the width if required.




---

Note: You may change the width manually by dragging column sides to the desired position

---

### Delete a Column:

Right-click on the column that you want to delete and select **Delete Column** from the pop-up menu.

### View the Properties of a Call:

Right-click on the required call in the Calls Status window and select **Properties** from the pop-up menu.

### Sort the Records According to one of the Column Headings:

Click on the required column heading.

The list will be sorted according to the selected field . Selecting the same column again will cause the sort order to toggle between ascending and descending.

## The Telephony Window

The Telephony window represents an actual telephone, enabling you to perform all telephony operations from your desktop. Using the keypad on the left hand side of the window, you can dial numbers or enter them in the available field and click the **Send** button.

The rest of the buttons act like speed-dial buttons on a telephone. You may add as many additional buttons as required. These buttons can be programmed to perform a number of different actions and can activate any of the EPICAgent toolbar functions.

This window displays the default page (Telephony) containing the keypad and nine buttons. You can add pages to and remove pages from the Telephony Window and rename them as required. By assigning properties to each button, you can define its function and related information (e.g. the name displayed on the button).

### To Access the Telephony Window:

Click the Telephony button  in the EPICAgent Application Toolbar. This button can also be located in the Window category of the EPICAgent Setup.

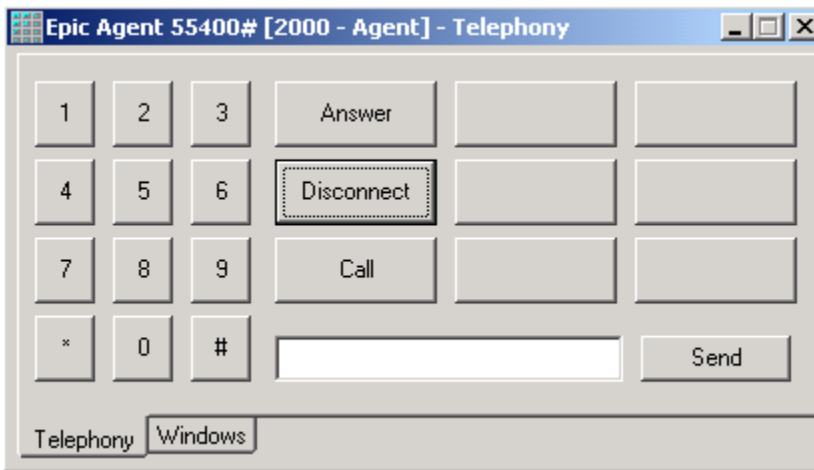


Figure 4-4 The Telephony Window

### To Make a Call:

In the programs tab, use the keypad to enter the required number or enter it into the available field and click the Send button.

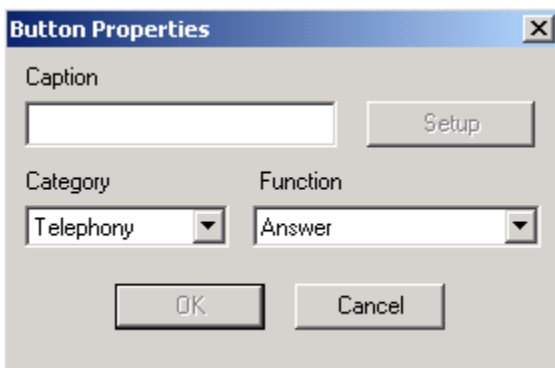


Figure 4-5 The button properties window

### To Define the Properties of a new Button:

1. Right-click on an empty button and select Properties from the pop-up menu.



2. The Button Properties dialog box opens.
3. From the drop-down lists, select the required **Category** (Telephony, ACD, Window or Other) and choose the **Function** that you want to assign to this button.
4. If the selected function requires you to define parameters (e.g. a number to dial), the **Setup** button is enabled. You may click this button to open the relevant dialog box (e.g. the Call Destination dialog box) and define the required parameters.
5. Enter the caption (the name that you want to appear on the button) and click **OK**.
6. The speed-dial button will appear in the telephony window displaying the caption name that you entered.

#### To Edit the Properties of a Button:

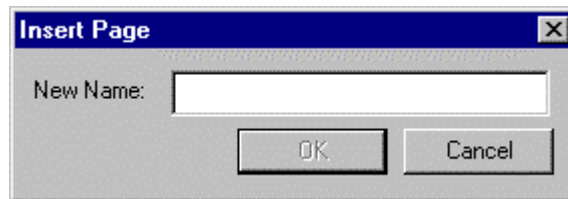
1. Right-click on the button and select Properties from the pop-up menu.
2. The Button Properties dialog box opens.
3. Edit the properties as required and click **OK**.

#### To Clear the Properties of a Button:

Right-click on the button and select **Clear** from the pop-up menu.

#### To Add a New Page of buttons:

1. Right-click on any page tab and select **Insert** from the pop-up menu.
2. The Insert Page dialog box opens.
3. Enter a unique name for the page and click **OK**.
4. A new page is created displaying 20 new empty buttons. You can add as many pages as required.

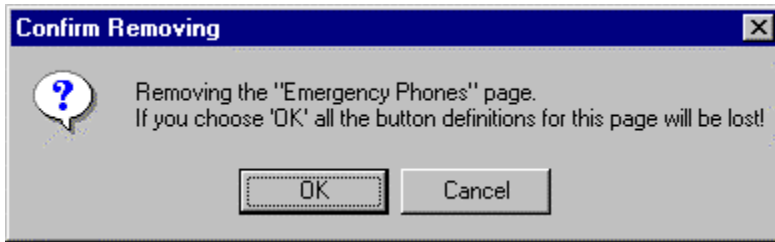
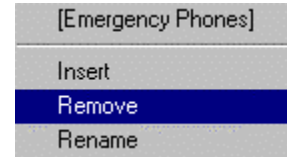


#### To Rename a Page:

1. Right-click on the tab and select **Rename** from the pop-up menu.  
The Rename Page dialog box opens.
2. Enter a unique name and click **OK**.

### To Remove a Page:

Right-click on the tab and select Remove from the pop-up menu. A dialog box opens warning you that removing the page will remove all of the associated buttons on that page. Click OK to continue or Cancel to abort the command.



### The ACD Calls Window

The ACD Window displays information about the calls that are currently waiting in one of the queues that you belong to. You can double-click on any call to answer it directly from this window.

### To Access the ACD Calls Window:

Click the ACD Calls button  in the EPICAgent Application Toolbar. This button can also be located in the window category of the EPICAgent Setup.

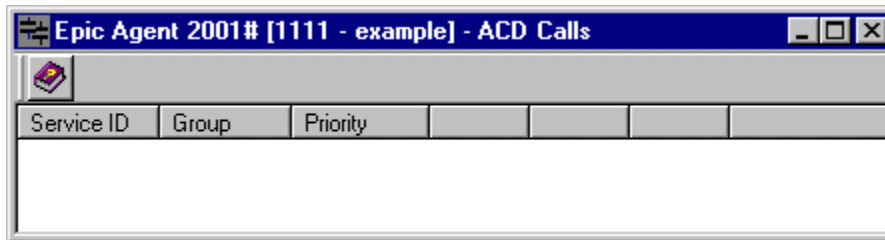


Figure 4-6 The ACD calls window

Information in the ACD Calls Window is displayed in column format, enabling you to sort the calls according to specific information, i.e. Priority. Below is a list of available fields:

Column Name	Description
Group	The ACD group through which the agent received the call
Waiting Time	How long the calls has been waiting.
<b>Call Profile Fields</b>	<b>As listed below</b>
Date	Date the call entered
Time	Time the call entered
Agent Extension	The extension number of the agent's station
Agent Number	The agent number
Agent PSW	The agent password
Average Queue Time	Average time a call spends in queue
Callback Dest.	For a call back call, this is the dial number to call
Callback time	For a call back call, this is the time to dial.
Customer Name	Taken from the site's database – where available.
Customer Number	Taken from the site's database – where available.
Calling	The caller ID (where available)
DNIS	The number on which the call entered the system
Language	The language in which the call is handled
Media	The media of the call (voice or chat).
Priority	The level of importance of a call
Queue Position	Where the call is positioned in a queue
Session ID	For chat call, this number is the session ID used by the WEB server. This number is for internal use only.
Service	Service required by the call
<b>User Fields</b>	The list of user defined call profile fields as defined in the system section of the administration.
<b>Skills</b>	The list of skills as defined in the system section of the administration.

**Table 4-4 The available columns for the ACD calls window**

In the ACD Calls window, you can perform the following activities:

**Answer a Call in the Queue:**

Double-click on the call that you want to answer.

---

Note: If another agent has already answered the call, it will not be routed to your destination.

---

**Sort the Records According to one of the Column Headings:**

Click on the required column heading.

The list will be sorted according to the selected field . Selecting the same column again will cause the sort order to toggle between ascending and descending.



**Add a Column to the ACD Calls Window:**

1. Right-click on any column heading and select **Insert Column** from the pop-up menu.
2. The **Insert Column** dialog box opens.
3. Select the column that you want to insert, define the **Header** (name that appears on the column), **Alignment** and **Width** of the column, and click **OK**. See *CHAPTER 4 To Insert a Column*.

**Remove a Column from the ACD Calls Window:**

Right-click on the column you want to remove and select **Delete Column** from the pop-up menu.

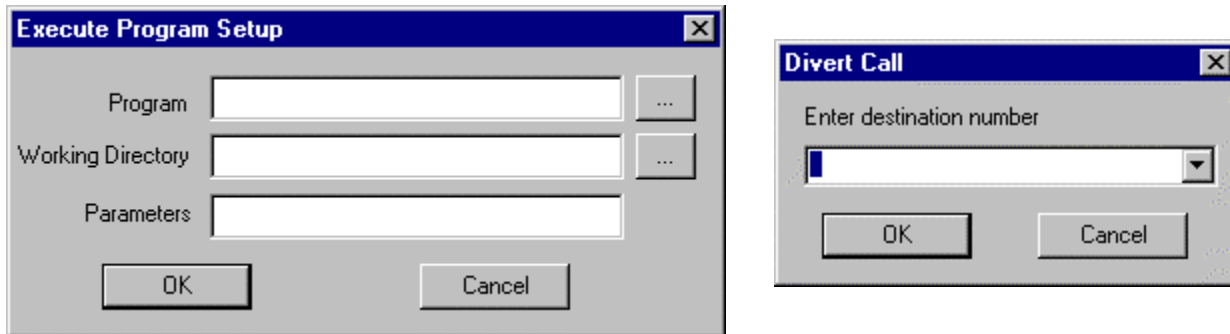
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## CHAPTER 5

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### Dialog Boxes

Certain buttons require additional information. The additional information may be saved in the button or entered each time the button is pressed. Each time such a button is placed on the toolbar, the EPICAgent opens a dialog box that enables the agent to fill in the required information. If the agent fills in information and click OK, the button is placed with the information stored in it. Otherwise, the button is placed with no information in it. In the last case, whenever the agent presses the button, the dialog box is opened, and the agent is requested to fill in the required information. The additional information may be edited any time



**Figure 5-1 The Button Properties dialog box for the execute program and divert call buttons**

The telephony actions that requires parameters are:

- Divert Call.
- Start Transfer.
- Start Conference.
- Single Step Transfer.
- Make Call.

## GLOSSARY

<b>ACD</b>	<b>Automatic Call Distribution</b> - the method used to distribute calls in the Contact Center. ACD calls are routed and monitored by the EPICCenter system.
<b>Agent</b>	<p>The function of an agent is to handle contacts routed <b>to him</b> by the EPICCenter system. <b>The EPICCenter supports two types of agents:</b></p> <p><b>The first type of agents</b> is equipped with the EPICAgent application and a telephone set and begins work by logging in to the system. To login, each agent enters a unique agent identification ID and password.</p> <p><b>The second type of agents is equipped with a telephone set only. Those agent begin to work by logging in to the system. To login, each agent dials to a predefined IRN and than upon voice prompt, dials in his agent ID.</b></p>
<b>Agent Group</b>	<p>Agent groups are used to form specialized units that are meant to receive calls relating only to the special function of those units.</p> <p>When all the agent stations in a group are busy or unavailable, incoming calls will be placed in a queue designated for that group.</p>
<b>ANI</b>	<b>Automatic Number Identification.</b> This is the series of digits that is sent by the PSTN to the PBX containing the Dial Number of the caller.
<b>ASA</b>	<b>Average Speed of Answer</b> - the average time it takes for a call to be answered, from the time it was received.
<b>Agent Search Criteria</b>	The method by which an available agent is selected for a call that enters the service.
<b>Call Answer Strategy</b>	The method by which an incoming call is routed to the agent, when the agent becomes available. The strategy comprises two stages; firstly, determining the set of calls to be considered for routing and then, selecting from the set, a single call to route to the agent.
<b>Call Priority</b>	A priority level assigned to each call on a scale of 1-100, where 100 is the highest priority.
<b>Call Profile</b>	A collection of dynamic properties attached to each individual ACD call.
<b>DHCP</b>	<b>Dynamic Host Configuration Protocol</b> enables individual computers on an IP network to extract their configurations from a server (the 'DHCP server') or servers, reducing the work necessary to administer a large IP network.
<b>Dial Numbers</b>	Dial numbers are used within the PABX environment to identify entities that can be a source of, or destination for, a call. For instance, an agent group is identified by an extension number specific to the group. When this number is dialed, the call will enter the group as an ACD call. Incoming trunks will be routed to this extension number to connect callers to the agent group.

<b>Extension Number</b>	A PBX extension number or directory number.
<b>First Announcer</b>	An announcement that is heard once, when a caller first enters the queue for the service.
<b>EPICEngine</b>	The EPICEngine (Intelligent ACD Routing) provides intelligent routing for the Contact Center, as well as enhanced skill based routing functionality for calls to agents.
<b>Incomplete Call Destination</b>	The destination of calls that have not been answered or handled to completion. This is a system wide destination that completes the handling of such calls.
<b>Interflow</b>	An algorithm designed to improve the way waiting calls are treated by transferring calls waiting over the amount of 'Interflow time' to a different destination. The Interflow parameters are defined per service.
<b>IRN</b>	<b>Intelligent Routing Numbers</b> – PBX dial numbers used as entry points to the routing system. Each number can be used to define rules for routing the incoming call to various destinations, including services, call control scripts and PBX devices.
<b>Lock Device</b>	The software protection plug, or dongle, (HASP) attached to the parallel port. The EPICServer and EPICVisors will neither install nor run without this device.
<b>Mandatory Announcer</b>	An announcement heard by all callers upon entering the service, regardless of the availability of agents.
<b>MIS</b>	The MIS (Management Information System), the EPICVisor, supplies real-time online information and historical reports on the performance of Contact Centers.
<b>Overflow</b>	An algorithm designed to improve the way waiting calls are treated, by expanding the number of potential agents to answer the call. Overflow is activated after the overflow timeout by adding groups of agents as the destination of the call.
<b>PBX</b>	Private Branch eXchange; the PBX.
<b>Report</b>	<p>Reports are used by system supervisors and management, to obtain information that provides an accurate picture of how the Contact Center is operating and performing. The information displayed can be either real-time or historical.</p> <p>Real-time reports display the present status of ACD activity as it is happening, whereas, historical reports summarize past ACD activity as recorded in the database.</p> <p>The EPICCenter generates and displays many different types of real-time and historical report formats. These reports provide management with an accurate picture of ACD activity that can be assessed and analyzed.</p>

<b>Report Template</b>	<p>The EPICCenter is supplied with a set of predefined report templates (default reports), which cover the full range of information available from the EPICCenter. In addition to predefined report templates, user-defined templates for historical reports can also be designed.</p> <p>The purpose of templates is to provide the supervisor with a virtually unlimited reservoir of report formats that can be filled out and generated, in a simple and straightforward manner. Templates can be modified to meet specific supervisor requirements.</p> <p>Templates can be saved, as private or public, with unique names for future use.</p>
<b>Routing by ANI/Caller ID</b>	<p>About ANI/Caller ID: The system supports two options in the following manner:</p> <ol style="list-style-type: none"> <li>1. <i>A call enters the IRN with ANI.</i> (ANI is information about the source of the call assigned to the call by the Central Office). The IRN has the option to route the call by ANI. The EPICEngine then goes to the customer's table or an external database, and searches for the customer according to the ANI received from the Central Office (CO).</li> <li>2. <i>A call enters the IRN without ANI.</i> The IRN sends the call to a Call Control Script (CCS) whenever a call enters the IRN without ANI. The EPICEngine sends the call to the defined CCS. This CCS is supposed to prompt the user to enter some caller id (i.e. social security number, customer id, etc.) and then enters it into the ANI field in the call profile. The call returns from the CCS to the IRN. The EPICEngine then goes to the customer's table or an external database, and searches for the customer according to the caller id entered by the CCS.</li> <li>3. If the customer is found, the EPICEngine uses the customer information and tries to route the call, using that information.</li> <li>4. If the customer is not found, the call is routed to the default destination of the IRN (or one of the IRN's alternate destinations).</li> </ol>
<b>Routing Method</b>	<p>The EPICCenter offers the Contact Center Administrator several call routing methods from which to choose - such as, Route by ANI, Best Fit, Agents Skills, etc.</p>
<b>Script</b>	<p>Call Control Scripts are used to define how calls should be routed. A script is a set of actions that are performed on a call according to logical/physical events (e.g. "Route the call to a specific destination", "Let the caller hear music/special announcers").</p>
<b>Secondary Announcer</b>	<p>Announcements that are played periodically while the caller is waiting in the queue.</p>
<b>Service</b>	<p>A service defines how a call will be processed. Every incoming call to the Contact Center is assigned to a specific service, such as: sales of specific products, specific banking services, specific travel agency services, etc.</p>

<b>STI</b>	<b>Service Time Intervals</b> - the time periods for which the call service is monitored for real-time or historical statistical data purposes. The STI is determined for each group in the system in the Administration application. It is used to generate histograms for statistical analysis.
<b>Super-Group</b>	A super-group is a collection of agent groups gathered together for statistical purposes. Super-groups may contain several agent groups and are used mainly to represent the hierarchy of the company-division-department. An agent group may belong to more than one super-group.
<b>Supervisor</b>	Each supervisor is responsible for specific groups of agents. Using the EPICVisor, supervisors can monitor agent performance and the ACD system. Each supervisor is assigned authorization attributes that allow or prevent access to different system operations.  Authorized supervisors can determine the routing plans for ACD calls, as well as information that will be included in reports (such as groups, agents, etc.). In addition, supervisors can change the information displayed on the Wall Boards under their control. They can also be assigned privileges for managing groups, e.g. adding and removing agents for specific groups.
<b>TCP/IP</b>	<b>Transmission Control Protocol/Internet Protocol</b> is the basic communication language or protocol of the internet. In many places it is used as a communications protocol in intranets and extranets.
<b>Trunk</b>	A trunk is a channel of conversation between the Public Service Telephone Network (PSTN) and the Private Branch Exchange (PBX). These lines carry all the ACD calls, as well as external non-ACD calls, to and from the system.
<b>Trunk Group</b>	A trunk group is a collection of trunk lines grouped together to act as a single line unit, with its own specific name and extension number. A trunk group is usually routed to a specific agent group.
<b>TSF</b>	<b>Target Service Factor</b> - The percentage of calls answered within the Target Average Speed of Answer (ASA), out of all the calls that are routed to the group. This factor indicates how well the group is providing the level of service defined for it, based on the Target ASA. Abandoned and overflowed calls are considered as answered after the Target ASA, for the calculation of this factor.