

HiPath DX IP Phone ACD User Guide

www.siemens.co.uk/hipathdx

SIEMENS

Global network of innovation

Waste Electrical and Electronic Equipment (WEEE)



All electrical and electronic products should be disposed of separately from the municipal waste stream via designated collection facilities appointed by the government or the local authorities.

This product is covered by the European Directive 2002/96/EC.

The correct disposal and separate collection of your old appliance will help prevent potential negative consequences for the environment and human health. It is a precondition for reuse and recycling of used electrical and electronic equipment.

For more detailed information about disposal of your old appliance, please contact your city office, waste disposal service or the shop where you purchased the product.

Contents

Contents	1
Introduction	3
About this user guide	3
Other user guides.....	3
About ACD	4
Setting your telephone for ACD working	5
Switch-based Congestion Control	6
Producing and fitting inlays	7
ACD Agent	9
Summary of tasks.....	10
Login and Logout	11
Not Ready	13
Assistance call	14
Emergency call.....	15
Account code	16
ACD Supervisor	17
Summary of tasks.....	18
Open/Close Queue - single queue supervisor.....	19
Open/Close Queue - multiple queue supervisor	20
Answering an Assistance call	22
Answering an Emergency call	23
Emergency close down of the queues.....	25

Introduction

About this user guide

This user guide is a supplement to the *HiPath DX IP Phone User Guide* and describes the operation of:

- ACD Agent features;
- ACD Supervisor features.

The operation of mandatory account codes is also described here.

Please refer to the *HiPath DX IP Phone User Guide* for information on the following topics which are useful for ACD working:

- making a call;
- answering a call;
- clearing a call;
- adjusting audio volumes;
- using a headset.

Other user guides

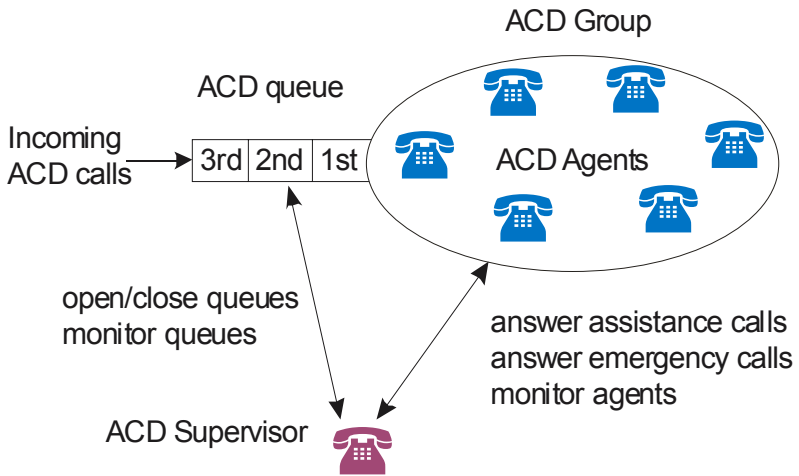
If necessary, refer to the following user guides for more information:

- *HiPath DX Telephone Features User Guide* for information on using the standard HiPath DX features.
- *HiPath DX IP Phone User Guide* for further information on using the IP Phones.
- HiPath DX online user guides supplied on the HiPath DX Electronic Publications (Ver. 9) CD provide additional details.

About ACD

ACD (Automatic Call Distribution) is a feature on your telephone exchange which automatically distributes incoming calls to a group of ACD Agents. For example, an ACD group may be a sales desk, where calls are answered in rotation and queued calls are answered by the next free agent.

Simplified diagram of an ACD system



The table below allows you to enter the ACD Group number(s) that you can log on to:

Group no.	Description	Group no.	Description

The table below is for multiple queue supervisors:

Queue no.	Description	Queue no.	Description

Setting your telephone for ACD working

Your telephone may be supplied to you already set to the correct configuration for ACD working.

Checking the configuration

❶ Press ◀ or ▶ until the display shows:

```
<date> <time>
Show telephone menu? < >
```

❷ Press ✓

```
TELEPHONE MENU
Set feature keys? < >
```

❸ Press ◀ or ▶ until the display shows:

```
TELEPHONE MENU
Set telephone options? < >
```

❹ Press ✓

```
CALL TIMER IS ON/OFF
Change? < >
```

❺ Press ◀ or ▶ until the display shows:

```
LAYOUT IS <xxxxxx>
Change? < >
```

Where <xxxxxx> is ACD AGENT, ACD SUPERVISOR or NORMAL.

If the layout is correct, leave your telephone for a few seconds; the menu exits without making any changes. If the layout is not correct, change the configuration as described below.

Changing the configuration

❻ Press ✓

```
SET TO NORMAL
Accept? < >
```

❼ For ACD Agent working:

Press ◀ or ▶ until the display shows:

```
SET TO ACD AGENT
Accept? < >
```

❽ Press ✓

```
CHANGE HAS BEEN STORED
Edit another? < >
```

After a few seconds the normal display is shown.

- 7 For ACD Supervisor working:
Press ◀ or ▶ until the display shows:
- 8 Press ✓

SET TO ACD SUPERVISOR Accept? < >

CHANGE HAS BEEN STORED Edit another? < >

After a few seconds the normal display is shown.

Switch-based Congestion Control

If Switch-based Congestion Control is implemented, remote IP Phones (phones in a different geographical location to the DX that hosts them) are configured in remote IP groups. The number of concurrent calls that a remote IP group can handle is limited to maintain speech quality.

When the maximum number of calls for the group has been reached any further incoming or outgoing calls are rejected. Therefore, if you have a remote IP Phone you may not be able to make a call or use a feature due to network congestion (when the limit for the number of concurrent calls to the remote destination has been reached). When this happens **Line in use** is displayed for 3 to 5 seconds and the phone sounds three warning buzzes.

You must try to make the call or use the feature later.

ACD telephones should not be put into remote groups where switch-based congestion control applies. Doing so will have serious implications for the operation of the ACD system and the associated CTI applications.

Producing and fitting inlays

You may be supplied with pre-printed inlays; use the inlays that best correspond to the diagrams shown here. Otherwise use the templates or online tool to create inlays.

On the optiPoint 420 the function of each key is identified by an electronic label next to the key (self-labelling key - SLK). The label changes if the key is programmed for another function. An inlay is not needed for optiPoint 420 phones.

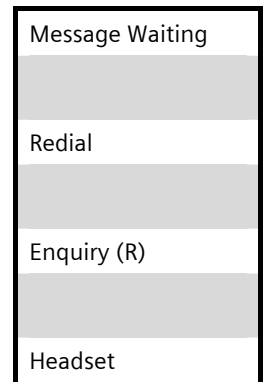
Online tool

This is at <http://www.siemens.com/hipath> > Downloads > Software. A wizard guides you through the process of creating the labels.

Templates

Microsoft Word templates are available on the HiPath DX Electronic Publications (Ver. 9) CD supplied with your telephone system. They may also be available on your company's intranet.

Open the "optiPoint 500 ACD templates" file, select the feature-keys inlay and either the ACD Agent or ACD Supervisor inlay for use with your telephone model (printed on the underside of your telephone). Annotate the inlays as appropriate and print them out.



**Typical feature
keys inlay**

Protective covers

Protective plastic covers are supplied with your telephone. Fit the covers matt side up.

ACD Agent

ACD (Automatic Call Distribution) systems ensure that external calls to a team are answered in rotation and that queued calls are answered by the next free agent.

ACD Agent telephones have special features assigned to some keys:

Assistance
Emergency
Logout
Login
Not Ready

Assistance - used to seek help from your supervisor during a call.

Emergency - used to contact your supervisor during an emergency, for example, a bomb threat.

Logout - logs you out of the ACD system, for example, at the end of your shift

Login - logs you on to the ACD system.

Not Ready - temporarily disconnects you from the ACD system.

Summary of tasks

- ❶ At the beginning of your shift, Login to receive ACD calls.
- ❷ When you answer an ACD call you can:
 - allocate an Account code to the call (you can also do this at the end of the call);
 - seek Assistance from your supervisor;
 - alert your supervisor about an Emergency.
- ❸ At the end of the call, you may be allocated a "Write up" period. During this time you do not receive ACD calls so that you can complete updating customer records before receiving the next call. You can extend the Write up period using Not ready.

If you do not have a Write up period set, use Not ready until you are free to receive another call.

Also, at the end of the call you can allocate an Account code to that call.

- ❹ For longer periods, for example during a lunch break, you can Logout and then Login again at the end of the break.
- ❺ At the end of your shift, Logout.

Login and Logout

To receive ACD calls, you must log in to the ACD system. When you have finished, log out. When you are logged in you can also receive ordinary calls.

Logging in

To log in, you may need:

- Group number - your company may have several ACD systems, for example, help desk, sales. Each system has a different group number.
- PIN code - this is a four digit personal identification number dedicated to you (also called an Agent Identification Code or AIC).

Your supervisor or telephone systems manager will provide you with the relevant details.

❶ Press **Login**

```
ENTER GROUP NUMBER
Exit? < >
```

The Login lamp flashes

❷ Enter your group number and go to step 3,

```
<group number>
ok? < >
```

or press 0 for your default group and go to step 5.

❸ Press ✓ (if you do not need to enter a PIN, go to step 5)

```
PLEASE ENTER PIN CODE
Exit? < >
```

❹ Enter your PIN code

```
* * * *
Action the feature? < >
```

❺ Press ✓, the display shows:

```
IN <group number>
<number> < >
```

or, if Not ready is set, the display shows:

```
NOT READY
<number> < >
```

Press **Not Ready**.

The Login lamp is lit and you are logged in and ready to receive ACD calls

Answering an ACD call

When you answer an ACD call, the display shows:

```
VIA <queue>
Enquiry?           < >
```

If you are required to enter an account code either during the call or at the end of the call, the display shows:

```
ENTER ACCOUNT CODE
```

See page 14 for more information about account codes.

Logging out

To stop receiving ACD calls, logout:

- ❶ Press **Logout**; after a few seconds, display shows:

```
LOGGED OFF
<number>           < >
```

followed by:

```
<date>             <time>
<number>           < >
```

Not Ready

When you have ended an ACD call, a Write-up period begins (if set by your telephone services manager) to allow you time to complete any necessary tasks before receiving the next call. The duration of the Write-up period is set by your telephone services manager.

You can use the Not Ready feature to:

- extend the Write-up period;
- prematurely end the Write-up period;
- temporarily leave the ACD system for a break.

Setting Not Ready

- 1 Press **Not Ready**

```
NOT READY  
<number>          < >
```

The Not Ready lamp is lit, not ready is started, ACD calls are barred

Cancelling Not Ready

- 1 Press **Not Ready**

```
IN <group number>  
<number>          < >
```

The Not Ready lamp goes out, you can receive ACD calls

Ending the Write-up period

To prematurely end the Write-up period:

- 1 Press **Not Ready** twice

```
IN <group number>  
<number>          < >
```

Write-up is ended, you can receive ACD calls

Assistance call

Allows you seek help or advice from your supervisor. If your supervisor is not available, you may be passed to another supervisor.

Making an Assistance call

During an ACD call:

- 1 Press **Assistance**

<supervisor> Ring back? < >

*The Assistance lamp flashes,
your call is put on hold*

- 2 When your supervisor answers, the display shows:

<supervisor> Reconnect held call? < >

If SERVICE UNAVAILABLE is displayed, no supervisors are available. Press ✓ to return to your caller and try again later.

During an Assistance call

Returning to your call:

- 1 Press ✓

Pressing ✓ switches you between the caller and your supervisor

<caller> Reconnect held call? < >

The Assistance lamp goes out

Transferring the caller to your supervisor:

- 1 Press **Headset**

*The call is transferred; you
are free to receive further
calls*

Connecting your call, yourself and your supervisor into a conference:

- 1 Press **Assistance** again

IN CONFERENCE Enquiry? < >

*All three parties are joined
together*

Emergency call

If you receive a call which relates to a potential emergency, for example, a bomb threat or an abusive caller, you can call a supervisor quickly. The emergency call feature is set so that a supervisor can either:

- silently monitor the call, and subsequently intrude on the call;
- immediately intrude on the call.

Making an Emergency call

During a call:

1 Press **Emergency**

```
EMERGENCY <supervisor>
Show connected call? < >
```

The Emergency lamp flashes

2 When a supervisor answers, they either:

- silently monitor your call
- intrude

```
EMERGENCY <supervisor>
Show connected call? < >
```

The Emergency lamp is lit

```
VIA <queue>
Enquiry? < >
```

The Emergency lamp is lit, you and your caller hear a repeated beep

If EMERGENCY QUEUEING is displayed, all supervisors are busy.

If your supervisor is silently monitoring your call, press ✓ to switch your display between the caller and your supervisor:

```
EMERGENCY <supervisor>
Show connected call? < >
```

```
VIA <queue>
Enquiry? < >
```

Account code

You can allocate account code(s) to a call. The codes are sent to call information logging equipment and are associated with the call details. Your supervisor or telephone services manager will tell you the codes to use and when. Your telephone system may be set up so that codes are mandatory.

Sending account codes - automatic

Your supervisor will tell you if you have Account Code key(s) on your telephone.

During or after an external call:

- 1 Press **Account Code**



ACCOUNT CODE SENT

After a few seconds the normal display is shown.

Sending account codes - mandatory

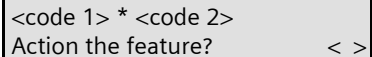
You need to know the code(s) to use. At the end of an external call:

- 1 The display shows:



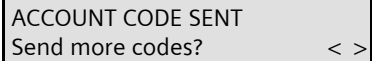
ENTER ACCOUNT CODE

- 2 Enter the code(s) separated by * (star key)



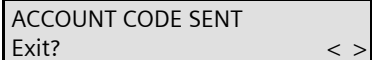
<code 1> * <code 2>
Action the feature? < >

- 3 Press ✓ the display shows:



ACCOUNT CODE SENT
Send more codes? < >

Followed by:



ACCOUNT CODE SENT
Exit? < >

- 4 Press ✓

The normal display is shown.

If the message ENTER ACCOUNT CODE is displayed, you need to enter another code; go to step 1.

ACD Supervisor

ACD (Automatic Call Distribution) systems ensure that external calls to a team are answered in rotation and that queued calls are answered by the next free agent. As a supervisor, you look after the ACD agents in one or more ACD groups. You answer their questions when they call you for assistance, and oversee the operation of the group(s).

ACD Supervisor telephones have special keys:

Assistance	Assistance - used to seek help from your manager or supervisor during a call.
Emergency	Emergency - used to contact your manager or supervisor during an emergency, for example, a bomb threat.
Silent Monitor	Silent Monitor - used to monitor an agent, for example as part of a training program.
Close Queue	Close Queue - Closes a call waiting queue.
Open Queue	Open Queue - Opens a call waiting queue.
Logout	Logout - logs you out of the ACD system, for example, at the end of your shift
Login	Login - logs you on to the ACD system.
Not Ready	Not Ready - temporarily disconnects you from the ACD system.

Summary of tasks

- 1 Logging in to a supervisor group, an agent group, or one of each at the same time.

The following operations are similar to those previously described for ACD Agent working. Differences are detailed below:

- Logging In and Out, see page 7
You can log in to more than one ACD system. To use the supervisor features, you must log in to a supervisor group. You can be logged into a supervisor group and an agent group at the same time, carrying out both roles. The same procedure is used to log into both groups. You may have a supervisor of your own, whom you can call for assistance.
If you are logged in to two groups, logging out always leaves you logged in to the supervisor group.
 - Answering an ACD Call, see page 8.
 - Not Ready feature, see page 9.
 - Making an Assistance Call, see page 10.
You can seek assistance from your manager or supervisor.
 - Making an Emergency Call, see page 11.
You can make an emergency call to your manager or supervisor.
- 2 Opening and closing ACD call waiting queue(s). Supervisors of a single queue see page 15; supervisors of multiple queues see page 16.
 - 3 Viewing the number of calls waiting in a specific ACD queue (only for multiple queue supervisors), see page 17.
 - 4 Answering ACD Agent's assistance calls, see page 18.
 - 5 Answering ACD Agent's emergency calls, see page 19.
 - 6 Monitoring (listening in to) an ACD Agent's call, see page 20.
 - 7 Closing all queues during an emergency, see page 21.

Open/Close Queue - single queue supervisor

Each ACD system has a supervisor who is designated as a "queue supervisor". If a queue is open and all the ACD Agents are busy, calls to the ACD system:

- are queued (may hear music and/or a recorded message), or
- receive busy tone, or
- are redirected to another answering point.

You can open or close the ACD queue and check the number of calls waiting in the queue. When you open a queue, your telephone displays the number of calls waiting in the queue.

Opening a queue

- 1 Press **Open Queue** (if you hear the number unobtainable tone, you may be a "multiple queue supervisor", see the next page)

A rectangular box representing a telephone display with the text "OPENED <queue>" inside.

- 2 After a few seconds the display shows the number of calls in the queue

A rectangular box representing a telephone display with the text "0 CALLS TO <queue>" inside.

- 3 When your telephone is idle, the display shows the number of calls in the queue and is periodically updated

A rectangular box representing a telephone display with the text "3 CALLS TO <queue>" on the top line and "<number>" on the bottom line, followed by "< >" navigation arrows.

Closing a queue

- 1 Press **Close Queue**

A rectangular box representing a telephone display with the text "CLOSED <queue>" inside.

After a few seconds the normal display is shown.

Open/Close Queue - multiple queue supervisor

Some ACD systems allow a single supervisor to open and close several ACD queues. The supervisor is called a "multiple queue supervisor". If a queue is open and all the ACD Agents are busy, calls to the ACD system:

- are queued (may hear music and/or a recorded message), or
- receive busy tone, or
- are redirected to another answering point.

You can open or close the ACD queues and check the number of calls waiting in the queues. Select and open/close queues using feature codes.

Opening a queue

Select the queue to open (if you are already viewing the status of the required queue and no others, go to step 3):

❶ Press **Headset**

❷ Dial * # 1 1 <queue number>

<queue> CLOSED

You hear success tone

❸ Press **Open Queue**

<queue> OPEN
<number> < >

Closing a queue

Select the queue to close (if you are already viewing the status of the required queue and no others, go to step 3):

❶ Press **Headset**

❷ Dial * # 1 1 <queue number>

<queue> OPEN

You hear success tone

❸ Press **Close Queue**

<queue> CLOSED
<number> < >

Viewing the status of all the queues

- ❶ Press **Headset**
- ❷ Dial * # 1 1 *
- ❸ Press **Headset** again

You hear success tone

The queues are displayed one at time, interspersed with the normal display

Typical displays are:

ACD <queue 1> CLOSED <number>	< >
----------------------------------	-----

2 CALLS TO <queue 2> <number>	< >
----------------------------------	-----

Viewing the status of a specific queue

- ❶ Press **Headset**
- ❷ Dial * # 1 1 <queue number>
- ❸ Press **Headset** again
- ❹ To view the next queue, press **Headset** and then dial * # 1 1 #
- ❺ Press **Headset** again

You hear success tone

The queue is displayed, interspersed with the normal display

You hear success tone

The next queue is displayed

Answering an Assistance call

You can receive assistance calls from agents who require help.

- 1 You receive an assistance call

```
ASSISTANCE <super group>  
Show calling number?
```

- 2 Answer the assistance call

```
ASSISTANCE <super group>  
Enquiry? < >
```

The original external call is put on hold. After you answer the assistance call the agent can:

- transfer the call to your telephone;
- return to the held call, placing your telephone on hold, then later reconnect to your telephone;
- connect your telephone, the call and the agent together in a conference call.

Answering an Emergency call

If an agent presses their Emergency key during a call, you will receive an alert. When you answer the call, you will either:

- silently monitor the call, and can subsequently intrude on the call; or
- intrude on the call immediately.

Emergency calls are directed to a supervisor in the following order:

- personal supervisor;
- preferred supervisor;
- emergency assistance point.

You are set to silently monitor the call

Your telephone is idle:

- 1 Your telephone receives emergency ringing

```
EMERGENCY <super group>
Show calling number?
```

- 2 Answer the call

```
MONITOR <agent>
Enquiry? < >
```

You silently monitor the call

- 3 To intrude on a monitored call press **Silent Monitor**

```
INTRUDE <agent>
Ring back? < >
```

You are set to intrude on the call immediately

Your telephone is idle:

- 1 Your telephone receives emergency ringing

```
EMERGENCY <super group>
Show calling number?
```

- 2 Answer the call

```
INTRUDE <agent>
Ring back? < >
```

You intrude on the call

Silent monitor

This feature allows you to listen in to an ACD call at an agent, for example, as part of a training program. During monitoring, neither the agent nor the caller can hear you and you can intrude on the call.

Monitoring an agent

- 1 Press **Silent Monitor**

```
ENTER NO. TO MONITOR  
Exit? < >
```

- 2 Dial the agent's extension number

```
<agent>  
Action the feature? < >
```

- 3 Press ✓

```
MONITOR <agent>  
Enquiry? < >
```

If the agent is not on an ACD call:

- Agent is free to receive calls
- Agent is in Write-up or Not ready mode

```
<agent> FREE  
Enquiry? < >
```

```
<agent> UNAVAILABLE  
Enquiry? < >
```

- 4 To exit, clear the call

The normal display is shown

Intruding on a monitored call

When monitoring a call:

- 1 Press **Silent Monitor** again

```
INTRUDE <agent>  
Ring back? < >
```

You are now in a conference with the agent and the caller

Emergency close down of the queues

The ACD emergency close queues feature closes all ACD queues simultaneously. When the queues are closed, incoming calls to the queues are redirected to an alternative number or receive busy tone. This feature is used, for example, when you have to evacuate the building.

To use this feature you need to know:

- the feature code to use;
- at which telephones you can use this feature.

Contact your telephone services manager for details.

Activating Emergency close down

❶ List the handset or press **Headset**

❷ Dial the feature code

You hear success tone

All ACD queues are closed

Incoming calls to your ACD system are redirected to an alternative number or receive busy tone

❸ Replace the handset or press **Headset** again

HiPath DX

IP Phone

ACD User Guide

www.siemens.co.uk/hipathdx

Siemens Enterprise Communications

Siemens Enterprise Communications is one of the world's leading vendors of Open Communications solutions for enterprises of all sizes, enabling business processes to be more productive, faster and more secure - with any device, network or information technology infrastructure. The company is a wholly owned subsidiary of Siemens AG with 17,000 employees globally and headquarters in Munich.

Visit the website at www.siemens.com/enterprise or for UK specific information at www.siemens.co.uk/enterprise.

Freephone 0800 512412

www.siemens.co.uk/hipathdx

Siemens Enterprise Communications Limited •
Brickhill Street, Willen Lake, Milton Keynes. MK15 0DJ •
Tel. 01908 855000 • Fax. 01908 855001

Publication No. 1QDB 50157 AAA • Issue 3



FS 261

The information contained herein is the property of Siemens Enterprise Communications Limited and is supplied without liability for errors or omissions.

No part may be reproduced or used except as authorised by contract or other written permission. The copyright and the foregoing restriction on reproduction and use extend to all media in which the information may be embodied.

© Siemens Enterprise Communications Limited 2006. All rights reserved.

Siemens and HiPath are trademarks of Siemens AG.
iSDX, Realitis DX & HiPath DX are trademarks of Siemens Enterprise Communications Limited.

