NOBELBIZ®
OMNI+

ADMINISTRATION AND REFERENCE GUIDE

Software for a real
Omnichannel experience

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2 PURPOSE OF THIS GUIDE

This guide describes the capabilities of Omni+, as well as the operations commonly used for configuration and administration.

3 MORE INFORMATION

For more information on Omni+, visit the Resource Center at http://www.nobelbiz.com, where you will find more tutorials, guides and Omni+'s public access forum.

4 INTRODUCTION: WHAT IS OMNI+?

Omni+ is a web-based software solution for call centers that offers you an efficient interaction with your clients.

The Omni+ application meets all inbound and outbound contact requirements through the automatic dial-up feature for every modality; additionally, its Supervision, Administration, and Reports modules help manage and quantify call center performance. It includes connectors and powerful APIs providing the integration of applications and alternate communication channels and it quickly adapts to company requirements and technologies.

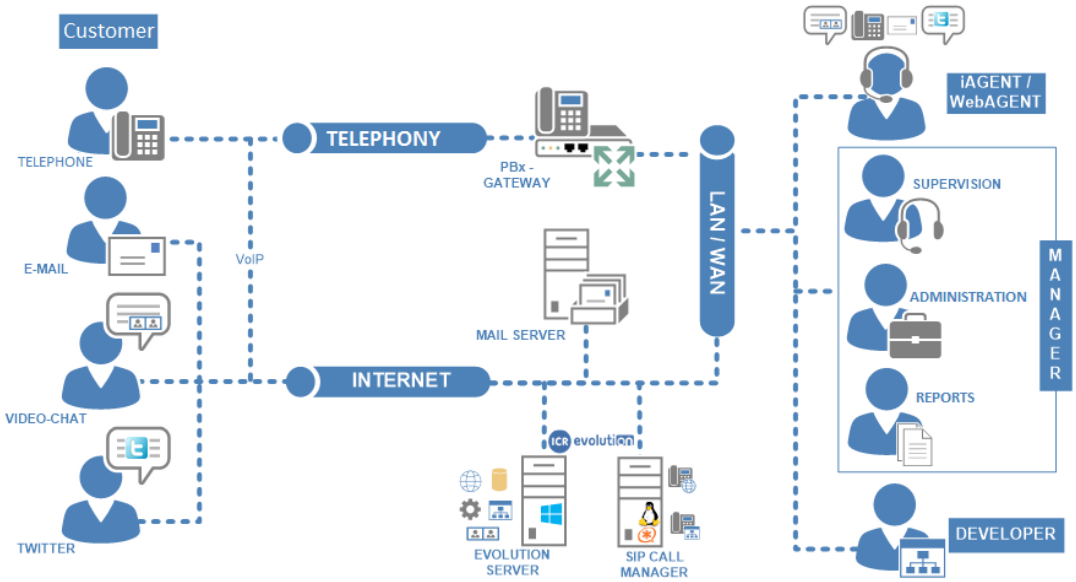
It also allows the development of scripts in different modalities and integrates them with the interface used by the agents.

Omni+ is presented in two editions: Community and Enterprise.

5 OMNI+'S ARCHITECTURE AND MAIN COMPONENTS

The main modules of Omni+'s architecture are:

- **Omni+ Server**: the main component of Omni+. It uses an SQL database to store configuration data, call records, and statistical data. It also integrates with the external PBX in order to monitor outbound and call reception activity.
- **Omni+ iAgent/webAgent**: the application providing a work environment for the Omni+ users by providing them an agent role. It connects to the server and displays agents the campaign applications or scripts.
- **Omni+ Manager**: Web application that allows administering and managing the entire system. For example, a supervisor/administrator can set parameters and supervise the operation of campaigns and services. It also provides information and statistics in real or historical time.
- **Omni+ Developer.NET**: it allows to design and program the campaign script and applications graphically and intuitively, providing the developer with a series of tools designed for this type of applications.
- **Compatible PBX**. Omni+ is compatible with the main PBX models in the market such as Avaya, Nortel, Alcatel, Panasonic and others, including Asterisk, an open source telephone private branch exchange.
- **SQL Database**: Currently, Omni+ manages its data using MS SQL Server 2005, MS SQL Server 2008, or MS SQL Server 2012 and MS SQL Server 2014.



SPANISH	ENGLISH
CLIENTE	CLIENT
TELEFONÍA	TELEPHONY
TELÉFONO	TELEPHONE

SUPERVISIÓN	SUPERVISION
ADMINISTRACIÓN	ADMINISTRATION
INFORMES	REPORTS

The following modules are complements and provide additional or optional functions:

- Evoadmin.exe: application to adjust technical parameters of the server.
- Task Daemon: this module is responsible for several important database tasks: daily transferring of information to historical data tables, loading the records in the campaign lists, removing and cleaning of the campaigns, users, etc.
- Router Daemon: this module is responsible for managing the Omni+ Dynamic Business Router (DBR). Implements the intelligent routing functionality based on strategies and skills.
- Dialer Daemon: is necessary for progressive and predictive mode dialing.
- Incentive Daemon: keeps information about incentives.
- Recorder Daemon: module recording calls in mp3 format.
- Evolink agent: EvoLinkAg is an ActiveX encapsulating a COM interface that communicates with the Omni+ server; it allows integrating Omni+ with other Windows applications. An xml/tcp interface is also available to integrate non-Windows applications.
- Tracemon: utility to collect logs and traces.

6 INTRODUCTION TO MAIN CONCEPTS AND FEATURES

6.1 MAIN INTERACTION FLOWS

The campaigns correspond to groups of agents performing similar tasks.

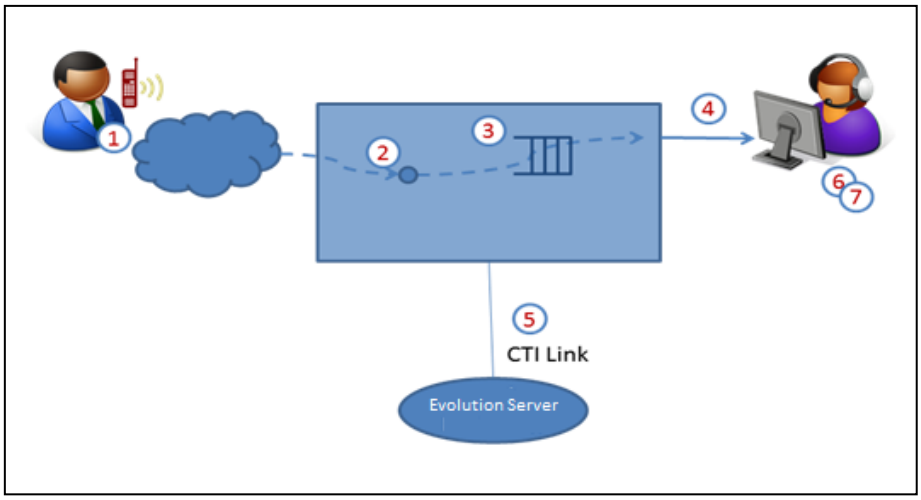
Designing contact center campaigns implies choosing what types of campaigns are required to cover business objectives and to define how the agents should participate in the different campaigns.

Omni+ makes it easier to manage different types of client interactions, inbound or outbound, through integration with the switch. Several types of switches have different capacities and characteristics and can impose some restrictions on the way the campaigns work.

Therefore, campaigns shall be administered per the capabilities of the switch being used. See the Omni+ Installation Guide to find configuration examples for every specific type of telephone switch.

To understand how Omni+ interacts with the switch, below you will see the main call flows.

6.1.1 INBOUND CALL, SWITCH-BASED ROUTING



Servidor Omni+ Omni+ Server

1. The client makes a call from the telephone network
2. By means of a telephone connection, the call is delivered to the switch. The switch usually directs these calls to the corresponding “routes” or gives special treatment from the call “DNIS."
3. The switch directs the call to an “ACD queue.” This element distributes the calls among the extensions that belong to it. In case that all extensions are busy, the call remains in queue.

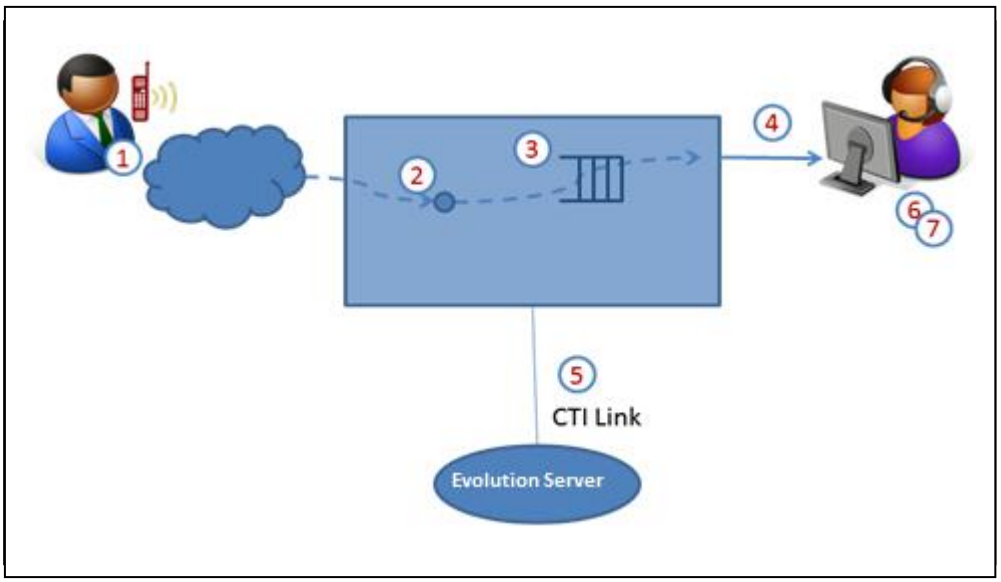
When an Omni+ agent gets free, the Omni+ server forces the change of status to “ready” at the extension`s workstation and the switch ACD queue will be able to transfer the next call to it.

4. The ACD switch queue transfers the call to the agent’s extension.

Omni+ monitors the agents’ extensions. When Omni+ detects an incoming call in the extension, the campaign containing a DNS-type strategy whose DN matches the called device number given by the switch CTI connection will be assigned. This number usually matches the ACD number even though some switches require specific values. See the Omni+ Installation Guide to find configuration examples for every specific type of telephone switch.

5. Omni+ detects the incoming call in the extension and assigns it to the campaign.
6. Iagent shows the script related to the campaign as well as the call data. The script can relate the call to a client record and display the pertaining data which helps the agent serve the call.
7. When the call ends, the workstation will turn into “administrative time” mode in order to allow the agent to finish the tasks related to the call. Finally, the agent will qualify the management of the call or reschedule a call-back through the script indicating an Omni+ call disposition. The workstation will be “available” again to serve the next call.

6.1.2 INBOUND CALL, DYNAMIC BUSINESS ROUTER-BASED



Servidor Omni+ Omni+ Server

1. The client makes a call from the telephone network.
2. By means of a telephone connection, the call is delivered to the switch. The switch usually directs these calls to the corresponding “routes” or gives special treatment from the call “DNIS."
3. The switch directs the call to a route point managed by Omni+ Dynamic Business Router (DBR).
4. According to the route point or to the call DNIS, the DBR will apply a specific strategy. The strategy defines to what campaign the call should be routed.
5. DBR places the call in queue in Omni+.

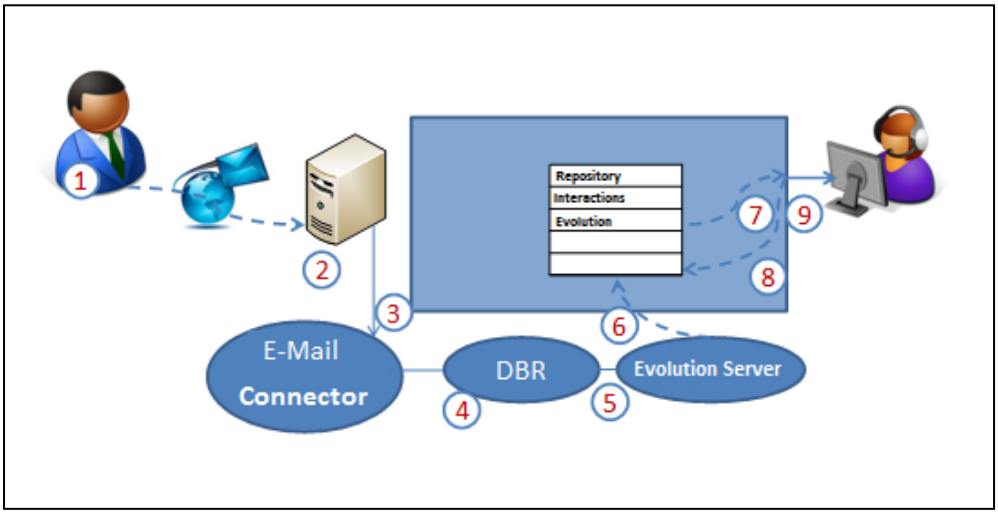
When an Omni+ agent gets free, the Omni+ server determines what call should be delivered to the agent. In case there are several available agents, the best agent is selected per the agent selection policy that has been set up. If the call has related skills, the agent with the proper skills will be selected.

6. The call is transferred by the DBR to the selected agent.

Omni+ monitors the agents’ extensions. When Omni+ detects an incoming call in the agent’s extension and it comes from the DBR, it recognizes it as such and displays the campaign pop-up screen corresponding to the call.

7. If the agent does not take the call, Omni+ places the agent in the Not Available status, selects another agent and transfers the call. If there is no agent available, the call remains in queue.

6.1.3 INBOUND INTERACTION, DYNAMIC BUSINESS ROUTER BASED



Spanish	**English**
Repositorio	Repository
Interacciones	Interactions
Conector e-mail	E-mail Connector
Servidor Omni+	Omni+ Server

Note: this model represents an interaction using a channel other than the telephone connection, for example, an email.

1. The client sends an interaction to the call center. In case of an e-mail, it will be sent to a specific account.
2. The e-mail arrives at the mail server.
3. A DBR connector reads the interaction.
4. DBR will apply a specific strategy. The strategy defines to what campaign the e-mail should be routed.
5. DBR places the call in queue in Omni+.
6. Omni+ stores the interaction in the Omni+ interaction repository.

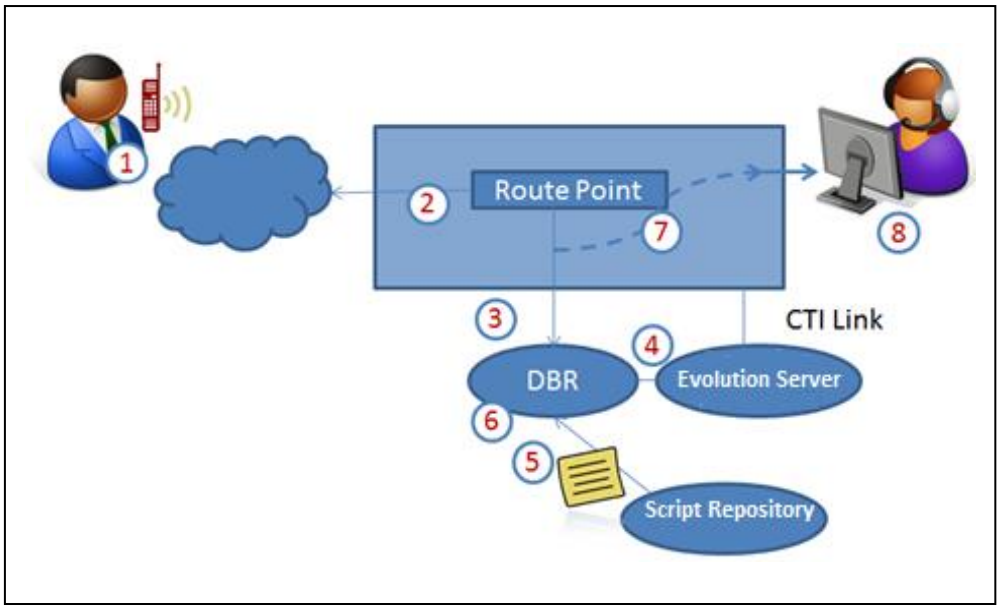
When an Omni+ agent gets free, the Omni+ server determines what interaction should be delivered to the agent. In case there are several available agents, the best agent is selected per the agent selection policy that has been set up. If the call has related skills, the agent with the proper skills will be selected.

7. The interaction is presented by Omni+ to the selected agent in Preview mode.

8. If for any reason, the agent does not qualify the interaction as treated, Omni+ places the interaction in queue again.

9. The interaction is later treated by another agent or even by the same agent.

6.1.4 INBOUND CALL, SCRIPT DYNAMIC BUSINESS ROUTER



Spanish	**English**
Repositorio scripts	Scripts Repository
Servidor Omni+	Omni+ Server

1. The client makes a call from the telephone network.
2. By means of a telephone connection, the call is delivered to the switch. The switch usually directs these calls to the corresponding “routes” or gives special treatment from the call “DNIS."
3. The switch directs the call to a route point managed by Omni+ Dynamic Business Router (DBR).
4. Based on the route point or the call DNIS, the DBR will apply a specific strategy.
5. If the strategy is of a “DBR-Script” type, its definition will be obtained from the server scripts repository (scriptname/default.xml)…
6. ...and the steps and sequences programmed in the script will be executed. For example, speeches and messages are issued or an answer from the IVR menu is required.
7. The script will typically consult internal and external data and will transfer the interaction to a campaign queue specifying the skills and properties according to the business rules.

When an Omni+ agent gets free, the Omni+ server determines what call should be delivered to the agent. In case there are several available agents, the best agent is selected according to the agent selection policy that has been set up. If the call has related skills, the agent with the proper skills will be selected.

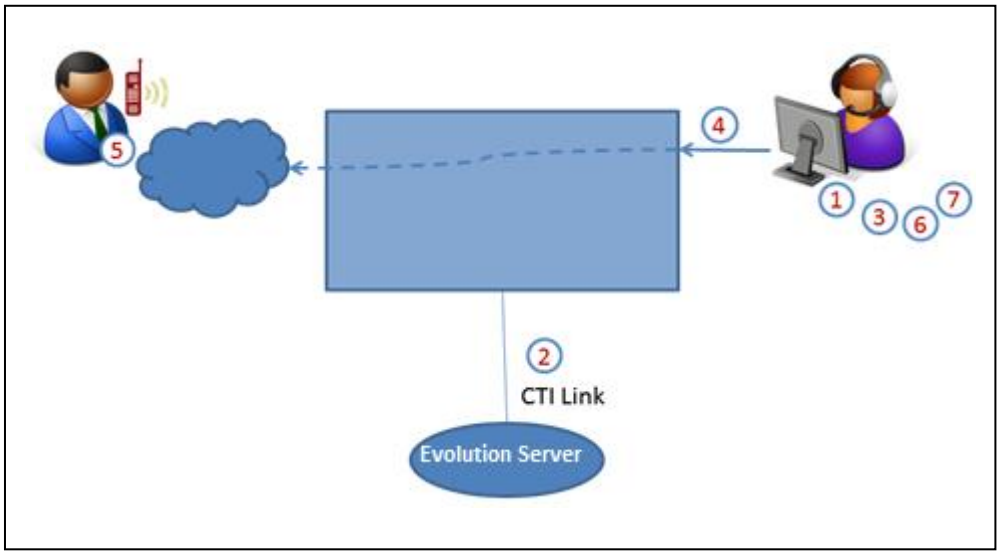
8. The call is transferred by the DBR to the selected agent along with the data and properties mentioned in the DBR script.

Omni+ monitors the agents' extensions. When Omni+ detects an incoming call in the agent's extension and it comes from the DBR, it recognizes it as such and displays the campaign pop-up screen corresponding to the call.

9. If the agent does not take the call, Omni+ places the agent in the Not Available status, selects another agent and transfers the call. If there is no agent available, the call remains in queue.

Note: This example shows the case of the DBR-script for a telephone call; treatment of a multimedia interaction such as an e-mail or twitter will be similar.

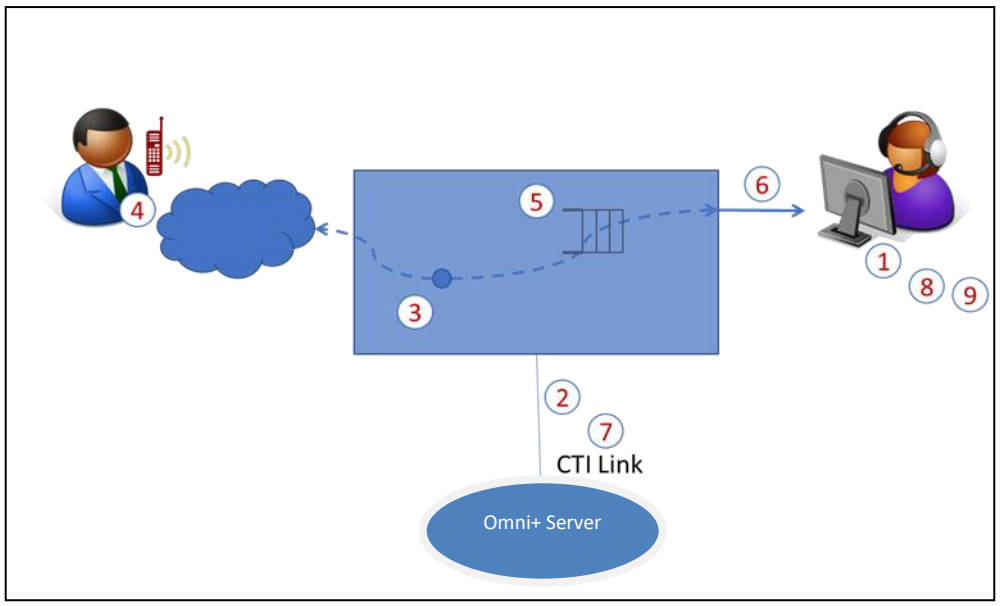
6.1.5 OUTBOUND CALL, PREVIEW



Servidor Omni+ Omni+ Server

1. The agent connects to Omni+ and goes into "available."
2. The Omni+ server selects the next client record that should be treated.
3. Iagent displays the script related to the campaign. The script receives the client data record and can show them to the agent.
4. When the agent presses the call button in iAgent, the Omni+ server will start a call from the agent's extension...
5. …to the client's telephone.
6. The agent manages the call by using iagent and the script.
7. When the call ends, the workstation will turn into "administrative time" mode in order to allow the agent to finish the tasks related to the call. Finally, the agent will qualify the management or reschedule a call-back via the script indicating an Omni+ call disposition. The workstation will then be "available" again to serve the next call.

6.1.6 OUTBOUND CALL, PROGRESSIVE OR PREDICTIVE



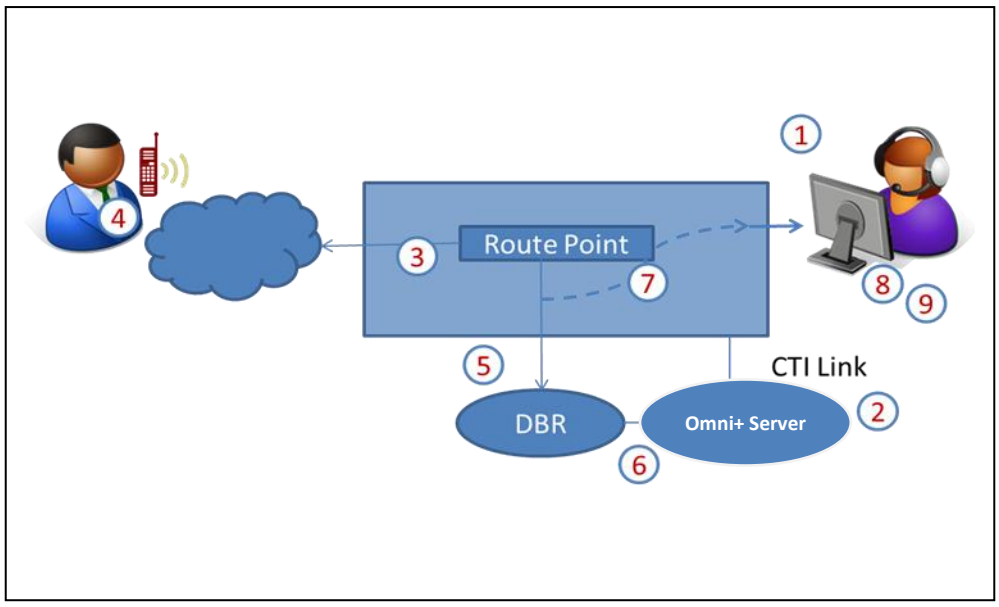
Servidor Omni+ Omni+ Server

1. The agent connects to Omni+ and goes into “available.”
2. The Omni+ server selects the record of the client that should receive a call.
3. The server begins the corresponding outbound calls through one or more “control devices.”

The “control devices” are elements whose configuration depends on the switch. These devices usually correspond to logical elements within the switch, even though in some cases, external software and hardware are required. See the Omni+ Installation Guide to find configuration examples for every specific type of telephone switch.

4. When a client call is detected as answered…
5. …this will be redirected towards the switch ACD queue.
6. The switch ACD queue transfers the call to the agent’s extension.
7. When Omni+ detects the dialing call in the extension, it will be automatically assigned to the campaign and to the client’s record
8. The agent manages the call by using iagent and the script.
9. When the call ends, the workstation will turn into “administrative time” mode in order to allow the agent to finish with the tasks related to the call. Finally, the agent will qualify the management or reschedule a call-back via the script indicating an Omni+ call disposition. The workstation will then be “available” again to serve the next call.

6.1.7 OUTBOUND CALL, PROGRESSIVE OR PREDICTIVE WITH DYNAMIC BUSINESS ROUTER



1. The agent connects to Omni+ and goes into “available.”
2. The Omni+ server selects the record of the client that should receive a call.
3. The server begins the corresponding outbound calls through one or more “control devices.”

The “control devices” are elements whose configuration depends on the switch. In a Dynamic Business Router (DBR) configuration generally those devices will correspond to a route point managed by the Omni+ server. See the Omni+ Installation Guide to find configuration examples for every specific type of telephone switch.

4. When a client call is detected as answered…
5. …a routing request to the DBR is generated…
6. …the administered strategy is performed and the call is routed to the Omni+ campaign that has created it.

Omni+ determines to what agent the call should be delivered. In case there are several available agents, the best agent is selected according to the agent selection policy that has been set up. If temporarily, there were no free agents, the call will remain in queue until the next agent becomes available.

7. The call will be transferred by the DBR to the selected agent's extension.

Omni+ monitors the agents’ extensions. When Omni+ detects an incoming call in the DBR preceding agent's extension, it recognizes it as such and displays the client's record in the campaign screen pop-up corresponding to the call.

8. The agent manages the call by using iagent and the script.
9. When the call ends, the workstation will turn into “administrative time” mode in order to allow the agent to finish with the tasks related to the call. Finally, the agent will qualify the management of the call or reschedule a call-back through the script indicating an Omni+ call disposition. The workstation will then be “available” again.

6.2 BASIC OMNI+ ADMINISTRATION PROCEDURES

Included below is a description of summarized instructions for some Omni+ administration procedures. The objective of these summaries is to provide a conceptual and high-level vision to help understand the most important steps.

To know the details, read the rest of chapter "6 Introduction to main concepts and features," as well as "7 Manager."

6.2.1 HOW TO CREATE AN INBOUND CAMPAIGN

Access Manager and identify yourself with an administrator-type user in the default installation, you can use the user account NCADMIN (password NCADMIN).

1. Create the agent-type users from Administration | Users.
2. Create the workstations from Administration | Workstations.
3. Create the campaign from Administration | Campaigns.

When the agent receives a call, Omni+ will assign it to the campaign containing a strategy whose DN matches the "called device" number provided by the switch CTI connection. This number usually matches the ACD number even though some switches require specific values. See the Omni+ Installation Guide to find configuration examples for every specific type of telephone switch.

4. In Administration | Campaigns | Queue | See strategies configure the queue and the strategies related to the recently created campaign.

The scripts are designed and built with Developer.NET and will be later published in the server. See "Omni+ Developer.NET Reference Manual." You can use one of the scripts as an example or build a customized script with Developer.NET.

5. In the campaign, select the "script" that must be shown to the agents when they receive a call.
6. Introduce the mandatory remaining parameters in the campaign administration, indicated with a star (*).
7. Press "Save", and the data will be saved and the form will change to "Campaign administration - Modification."
8. Change the campaign "status" to "active" and press "Save" again.

Administer the campaign call disposition so that the agents can categorize and/or plan the calls again.

9. From the "Campaign administration – Modification" press the "Call disposition codes" button in the "Details" section to access the "Campaign administration - call disposition" listing
10. Add the different campaign call disposition. See "6.14 Call disposition and back" We must administer a service through which the agents will participate in the campaigns. When the agents connect to the service, Omni+ will log in, if necessary, to the ACD queue corresponding to that service. See the Omni+ installation manual to find configuration examples for each type of telephone switch.

11. Access Administration | Services and create a new service.
12. From the “Services Administration- Modification” form, press the “assign campaigns” button and assign the campaigns that make up the service. Press “close.”
13. From the Services Administration - Modification” form, press the “assign participations” button and assign the users you wish to authorize to participate in the service. Press “Close.”
14. If you wish to administer pause reasons, press the “pause reasons” button and edit the pause reasons list for the agents working in the service.

Now you can run the application iagent in the PC at the workstation to confirm the agent can connect to the administered campaign and services.

15. Identify yourself in iagent with one of the agents’ user/password that you have set up in Manager.
16. The agent will see the list of services in which the administrator has given him/her the opportunity to participate. If the agent only participates in one, he/she will directly connect to the service.

When the agent presses the “available” button, Omni+ will change the extension to “ready” and will allow the reception of ACD calls.

17. When the workstation extension receives a call, Omni+ will use the information provided by the switch to determine if it is a campaign call or an agent call. If it is a campaign call, iagent will show the script corresponding to the campaign.
18. The agent will be able to serve the call using iagent and the script shown and, finally, will categorize the call running an Omni+ call disposition through the script.

See “7.4.3 Campaigns”

6.2.2 HOW TO CREATE AN OUTBOUND CAMPAIGN

Access Manager and identify yourself with an administrator-type user in the default installation, you can use the user account NCADMIN (password NCADMIN).

1. Create the agent-type users from Administration | Users.
2. Create the workstations from Administration | Workstations.
3. Create the campaign from Administration | Campaigns.

In general, Omni+ will use a control device to manage outbound calls that are made in the progressive or predictive dial-up mode. The preview or automatic preview dial-up modes use the workstation extension and do not require the use of the “control device.” See the Omni+ installation manual to find configuration examples for each type of telephone switch.

4. In the campaign, set-up the “Cont. Device” parameter (control device).

When the agent receives a call, Omni+ will assign it to the campaign containing a strategy whose DN matches the “called device” number provided by the switch CTI connection. This number usually matches the ACD number even though some switches require specific

values. See the Omni+ installation manual to find configuration examples for every specific type of telephone switch.

5. Specify the proper value for “Street Tel.(DNIS).”

When Omni+ makes a campaign outbound call, it can add a prefix to the telephone number obtained from the database. This prefix is called TAC and it allows to gain access to a connection or to make it easier to set the telephone fees. The TAC value is administered in the Omni+ campaign.

6. Specify a proper value for the TAC (trunk access code) parameter. E.g.: “0”

The scripts are designed and built with Developer.NET and will be later published in the server. See “Omni+ Developer.NET Reference Manual.” You can use one of the scripts as an example or build a customized script with Developer.NET.

7. Select a script in the campaign that must be shown to the agents when they receive a call.
8. Enter the rest of the mandatory parameters in the campaign, indicate them with a star (*).
9. Press “Save”, and the data will be saved and the form will change to “Campaign administration – Modification.”
10. Change the campaign “status” to “active.”
11. Select the “dial-up mode.” For example: “preview.”
12. Press “Save” again.

Administer the campaign call disposition so that the agents can categorize and/or plan the calls again.

13. From the “Campaign administration – Modification” press the “Call disposition codes” button in the “Details” section to access the “Campaign administration - call disposition codes” listing.
14. Add the different campaign call disposition. See “6.14 Call disposition and ”

Load the records list of the clients to be called to the database.

15. From the “Campaign Administration – Modification,” press the “Import clients” button in the “Details” section.
16. The “Campaign Administration – Record Import” list will be displayed. Select the CSV file with the records you wish to upload in the campaign.
17. The “Administration campaigns - Field selection” form will appear. Link the fields of the CSV file with the fields of the “client” table You can also link the fields of the CSV file with “Additional data.”
18. Press “Start Import” and “Close.” For more details on the client records uploading, see “6.10 Client Records”

We must administer a service through which the agents will participate in the campaigns. When the agents connect to the service, Omni+ will log in, if necessary, to the ACD queue corresponding to that service. See the Omni+ installation manual to find configuration examples for each type of telephone switch.

19. Access Administration | Services and create a new service.
20. From the “Services Administration- Modification” form, press the “Assign Campaigns” button and assign the campaigns that make up the service. Press “close.”

21. Now press the “assign participations” button and assign the users you wish to authorize to participate in the service. Press “Close.”
22. If you wish to administer pause reasons, press the “pause reasons” button and edit the pause reasons list for the agents working in the service.

Now you can run the application iagent in the PC at the workstation to confirm the agent can connect to the administered campaign and services.

23. Identify yourself in iagent with one of the agents’ user/password that you have set up in Manager.
24. The agent will see the list of services in which the administrator has given him/her the opportunity to participate. If the agent only participates in one, he/she will directly connect to the service.

When the agent presses the “available” button, Omni+ will start the process of issuing calls based on the dial-up mode set up in the campaign.

If the campaign is set up in Preview, when the agent becomes “available,” the iagent application will show the script corresponding to the campaign with the record data required to place the call.

25. When the agent presses the “call in campaign” iagent button, the workstation extension will begin the outbound call.
26. The agent will be able to serve the call using iagent and the script shown and, finally, will categorize the call running an Omni+ call disposition through the script.

If the campaign is set up as Progressive or Predictive, when the agent becomes “available,” the server will begin the dialing process by using “call progress analysis,” and when it detects that a call has been answered, it will transfer it to the agents through the ACD queue.

27. If the campaign is set up as Progressive or Predictive, the agent will receive calls generated through the dialing process, through the ACD queue. In the iagent application, the agent will be shown the script corresponding to the campaign with the call log data.

See “7.4.3 Campaigns”

6.3 USERS, USER GROUPS AND ROLES (PERMISSIONS)

A “user” is any person or system accessing Omni+ through its applications or through APIs. It is identified or authenticated by a username and a password.

Users can optionally be grouped into “user groups," which eases up management tasks.

A user can belong to none, one or more groups.

There are predefined groups, called “BUILTIN_ADMIN,” “BUILTIN_SUPER” and “BUILTIN_REPORT,” and other groups can be created according to the corresponding needs. E.g.: “TMK_VIP campaign team.”

In Omni+, access permissions are organized through “roles.” A role entails the necessary permissions to perform one or more tasks. For example: “Administer campaigns,” “Listen to call recordings,” or “Obtain more reports (according to the assigned services).” Users can have access to different system functions and modules according to the roles they have been assigned.

Roles can be assigned individually to users or collectively to groups.

Valid user permissions are determined by the sum of roles the user has been assigned either individually or collectively through the groups the user belongs to.

In general, permissions are valid at the time the user connects to the system.

Predefined groups “BUILTIN_ADMIN,” “BUILTIN_SUPER” and “BUILTIN_REPORT” have a series of standard roles that can be edited.

When a new user is created, a “user type” must be selected.

USER TYPE	DESCRIPTION
Agent	Can connect to the agents’ application. Runs campaigns and services, manages contact with clients.
Administrators	Can connect to the Manager application They are preassigned to the “BUILTIN_ADMIN” group. Set up the Omni+ platform and perform data maintenance tasks and configurations, including the user configuration creation/modification, workstations, services, campaigns, applications, contacts upload/download, deleting historical data.
Supervisors	Can connect to the Manager application. They are preassigned to the “BUILTIN_SUPER” group. Supervise the center activity from real-time data and can act dynamically on certain parameters such as dial-up mode, priorities or segments. Can access the reports through Manager.
Commercial	Can connect to the Manager application. They are preassigned to the “BUILTIN_REPORT” group. Can access the reports through Manager.

6.3.1 HOW TO CREATE A USER

Access Manager and identify yourself with an administrator-type user. In the default installation, you can use the user account NCADMIN (password NCADMIN).

1. In the Administration | Users module select the [New] button.
2. Enter the mandatory parameters indicated with a star (*).
3. Select the user type. For example: Agent.
4. Enter Name and Last name.
5. Type user login and password separated by the character '/', in the "Login/Password" field. For example: "AGENT/AGENT."
6. If the switch requires the user to introduce an agentID and/or an agentPassword to sign the extension in the ACD group, report the corresponding "ACD parameters."
7. Close and save.

See "7.4.2 Users"

6.3.2 HOW TO ADMINISTER A USER GROUP

Access Manager and identify yourself with an administrator-type user in the default installation, you can use the user account NCADMIN (password NCADMIN).

1. In the Administration | Users module, select the “See user groups” button.
2. In the “User Group Administration - List” view, you can select one of the existing groups or press the “New” button in order to create a new group. Select the group you wish to edit.
3. In the “User Group Administration - Group Members,” you can edit the “Users group” from “Users.”

6.3.3 HOW TO ASSIGN ROLES TO USERS OR GROUPS

Access Manager and identify yourself with an administrator-type user in the default installation, you can use the user account NCADMIN (password NCADMIN).

4. In the Administration | Users module, select the user you wish to assign roles.
5. In the “Users Administration - Modification” module, select the “See roles” button.
6. In the “User Roles Administration - List” preview, edit the “Roles assigned to the user” from the “Available roles.”

6.3.4 WHAT IS USER “PARTICIPATION” IN A SERVICE? (PARTICIPATION OPPORTUNITY)

Generally, the agent-type users and supervisors participate in one or more services made up by campaigns.

A “service participation” is the user/service relationship that allows the user to connect to a specific service. Sometimes participations are also called “participation opportunities.”

Participations allow agents to connect to a service through the agent application whereas supervisors are granted permissions to access supervision functions related to the services.

Participations are managed through Manager, accessing the services administration or through the users’ administration, and they can be assigned to individual users or to groups of users.

Considering that a participation is the relationship between a user and a service and that a service is made up by a series of campaigns, participations generate a framework made up by:

- Users (agents and supervisors)
- Services
- Campaigns

Example: An agent participating in a service will be able to connect to this service through the agent application.

Example: A supervisor participating in a service will be able to supervise the subset of services, campaigns and agents generated by the service participation.

Participations affect the valid users' permissions on services, campaigns and agents.

For example: A user with the "Supervise services, campaigns and agents" role will be able to supervise **all** the system services, campaigns and agents.

For example: A user with a role to "Supervise services, campaigns and agents (according to the assigned services)" can only supervise those services or agents corresponding to his/her service participations.

For example: If "JOHN" is a supervisor user who is only assigned to one participation in the "SALES" service and has one role assigned: "Supervise services, campaigns and agents (according to the assigned services)," then JOHN can only supervise the "SALES" service, the campaigns included in that service and the agents participating in "SALES."

6.3.5 HOW TO ASSIGN A SERVICE PARTICIPATION

Access Manager and identify yourself with an administrator-type user. In the default installation, you can use the user account NCADMIN (password NCADMIN).

1. In the Administration | Users module, select the user you wish to grant the service participation.
2. In the "User administration - Modification" view, identify the "Services assigned to user" and "Services available" lists.
3. You can add/remove services from the list of services assigned to the user by using the arrows.

You can also assign participations collectively through the users' groups:

1. In the Administration | Users module, select "See user groups."
2. Select the group you wish to edit in order to access the "Administration of Users Group - Group Members."
3. In the "Users Group Administration - Group members" view, select the "Assign participations" button.
4. Edit "Services assigned to the group" / "Available services."

You can also assign participations from the service administration:

1. In the Administration | Services module, select the service you wish to edit.
2. In the "Services Administration - Modification" view, select the "Assign participations" button.
3. In the "Services administration - Participations assignments" you can add/remove user participations or user groups.

6.4 WORKSTATION

A workstation is the physical location from where the agent user accesses the system. The workstation generally has a terminal or telephone extension and a Windows PC.

Each workstation identifies itself in Omni+ from its “workstation name.” The relationship between the “workstation” and the corresponding telephone extension is established through Manager.

6.4.1 HOW TO CREATE A WORKSTATION

Access Manager and identify yourself with an administrator-type user in the default installation, you can use the user account NCADMIN (password NCADMIN).

1. In the Administration | Users module select the [New] button.
2. Enter the mandatory parameters indicated with a star (*).
3. Enter the workstation name, e.g.: “PT410,” “410” or “myextension.” When installing the iagent application in the agent's PC, you should specify the workstation corresponding to the telephone extension.
4. Type the phone number corresponding to the extension or the annex in the “telephone” parameter. For example: “410.”
5. Some switches require the “logic telephone” field to be informed. See the Omni+ installation manual to find configuration examples for each type of telephone switch.
6. When using the integrated softphone in iAgent, you can modify the extension secret and link it to an agent so that when that agent starts a session, he/she will always use this extension.
7. Close and save.

See “6.4 **Error! Reference source not found.**.”

6.4.2 WHAT IS A "FLOATING AGENT"?

In general, a workstation is independent from the user using it. This means that any user can start an agent session from any workstation, which is known as "floating agent."

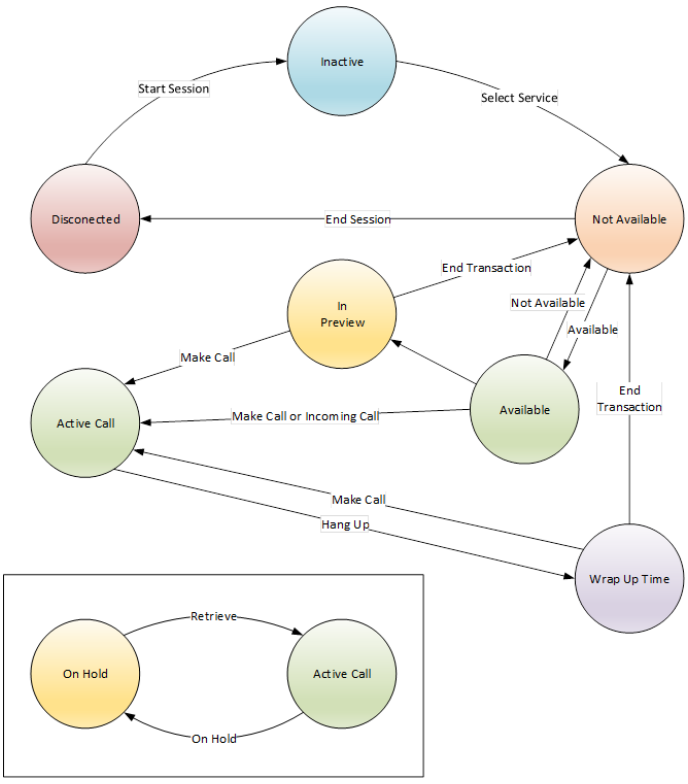
If a user has started a session in a workstation, he/she will not be able to start a session in a different workstation until he/she gets disconnected from the first one.

6.4.3 WORKSTATION POTENTIAL STATUS

When an agent connects to the iAgent application in a workstation, he/she can go through different status:

STATUS	DESCRIPTION
DISCONNECTED	The user is not connected.
INACTIVE	The user has started a session, but he/she is not connected to any service
NOT AVAILABLE	The user is not available for the system to assign a contact. Pause, on break.
AVAILABLE	User is available to manage an incoming or an outbound contact
PREVIEW	A management task has been assigned in Preview. The user has not started contact yet.
IN ACTIVE CALL	The user has an active contact.
IN CALL WAITING	The user has a contact on hold.
ADMINISTRATIVE TIME	The user has finalized a contact, but he/she still has not finished the management tasks. The management task is finished when a script related to the campaign finish with a call disposition.

A status life cycle model is as follows:



This cycle is an example since an agent status is determined by factors such as:

- Receiving or making a call.
- Ending a call.
- Running a call disposition in the application, within the "workstation."

6.5 CAMPAIGNS

The campaign is the work unit in the Omni+ platform. The campaign parameters can be changed from Manager.

The lists of client records to be contacted are associated to the campaigns.

A campaign can belong to one or several services.

Every Omni+ campaign has a weighted value assigned to it. This value is a whole number in between 1 and 100.

The relationship among the weighted values from different campaigns making up a service conditions the allocation of the dial-up rhythms within a service.

The adjustment is made through statistical processes and, therefore, it is approximate.

> For example:
>
> Weightedvalue_Campaign_A = 100
>
> Weightedvalue_Campaign_B = 50
>
> The dial-up rhythm relationship Campaign_A / Campaign_B will be of 100/50 = 2:1

6.5.1 HOW TO CREATE A CAMPAIGN

Access Manager and identify yourself with an administrator-type user in the default installation, you can use the user account NCADMIN (password NCADMIN).

1. Create the campaign from Administration | Campaigns.

In general, Omni+ will use a control device to manage outbound calls that are made in the progressive or predictive dial-up mode. The preview or automatic preview dial-up modes use the workstation extension and do not require the use of the “control device.” See the Omni+ installation manual to find configuration examples for each type of telephone switch.

2. In the campaign, set-up the “Cont.” Device” parameter (control device).

When the agent receives a call, Omni+ will assign it to the campaign containing a strategy whose DN matches the “called device” number provided by the switch CTI connection. This number usually matches the ACD number even though some switches require specific values. See the Omni+ installation manual to find configuration examples for every specific type of telephone switch.

3. Set up the queue and the strategies related to the campaign from Administration | Campaigns | Queue | See strategies.

When Omni+ makes a campaign outbound call, it can add a prefix to the telephone number obtained from the database. This prefix is called TAC and it allows to gain access to a connection or to make it easier to set the telephone fees. The TAC value is administered in the Omni+ campaign.

4. Specify a proper value for the TAC (trunk access code) parameter. E.g.: “0”.

Scripts are designed and built with Developer.NET and they must be recorded later in the system through Manager. See “Omni+ Developer.NET Reference Manual.” You can use one of the scripts as an example or build a customized script with Developer.NET.

5. In the campaign, select the “script” that must be shown to the agents when they receive a call.
6. Introduce the mandatory remaining parameters in the campaign administration, indicated with a star (*).
7. Press “Save”, and the data will be saved and the form will change to “Campaign administration - Modification.”
8. Change the campaign “status” to “active” and press “Save” again.
9. Administer the following Campaign entities: Call dispositions, Segments.
10. If necessary, load all client records through “import clients.”

See “7.4.3 Campaigns”

6.6 SERVICES

A service is an Omni+ agent user framework and it relates agents with campaigns.

Services are administered from Manager.

An agent can be authorized to work in several services. If this is the case, when connecting to the iAgent application, the agent must choose one of the potential services.

When the agents connect to the service, Omni+ will login, if necessary, to the ACD queue corresponding to that service. See the Omni+ installation manual to find configuration examples for each type of telephone switch.

6.6.1 HOW TO CREATE A SERVICE

We must administer a service through which the agents will participate in the campaigns. When the agents connect to the service, Omni+ will log in, if necessary, to the ACD queue corresponding to that service. See the Omni+ installation manual to find configuration examples for each type of telephone switch.

1. Access Administration | Services and create a new service.
2. From the "Services Administration- Modification" form, press the "Assign Campaigns" button and assign the campaigns that make up the service. Press "close."
3. From the Services Administration - Modification" form, press the "assign participations" button and assign the users you wish to authorize to participate in the service. Press "Close".
4. If you wish to administer pause reasons, press the "pause reasons" button and edit the pause reasons list for the agents working in the service.

See "7.4.4 Services"

6.7 SCRIPTS AND AGENT APPLICATIONS

The Omni+ scripts can also be called agent "scripts" or "applications."

Scripts help agents during their calls with the clients, showing them relevant data or pointing out what they need to say.

Contacts can occur with people trying to connect with the contact center or with people that have been contacted by the center through a phone call or through other media.

Agents can use scripts for:

- Identify and access contacts' information.
- Discuss with the contact following a specific script.
- Answer questions from the contact by accessing precise information.
- Collect data or information provided by the contact.
- Receive o transfer calls with related data.
- Plan call-backs or indicate how to contact the person again.
- Sort calls out in order to help the supervisors and the business people in charge to know the contact center performance.

When an agent receives an inbound or outbound campaign call, iAgent will automatically run the script related to the campaign showing the data related to management. This function is normally known as "screen pop-up."

The scripts automatically receive the contact data from the server and from the Omni+ database. Data specifically include the call phone number as well as other information relevant to the contact and business data such as name, address, other telephone numbers, etc.

6.7.1 HOW ARE SCRIPTS DEVELOPED WITH DEVELOPER.NET?

Scripts are built with the Developer.NET tool, that is a development environment specially optimized for developing call center scripts. The generated scripts are web-based and they make it easier to develop web applications in a Microsoft ASP.NET environment or within any other industry standard.

For complete information on Developer.NET, the script development environment, see the "Omni+ Developer.NET Reference Manual."

The developer is not only restricted to use the data stored in the Omni+ database, but it also can access data from external systems such as CRM, ERP, "back-office," etc.

Developer.NET most important features are:

- It is based on Microsoft Visual Studio 2010.
- It is a projects and solutions explorer.
- It has advanced editing options such as syntax-based coloring, drag & drop, etc.
- Visual development environment. It allows to obtain a view of the final result before displaying the application to the agents.
- Application display integrated with Omni+.
- Integration with source code managers such as Microsoft Visual SourceSafe.
- Access to simplified data.
- Specific visual controls (Visual Omni+ Library).
- Pages and project templates.

See "Omni+ Developer.NET Reference Manual."

6.7.2 HOW TO DEVELOP A NEW SCRIPT

If you wish to create a new script from a previous script project, copy the complete starting script directory to a new location.

1. Locate the new project file .evoscript and rename it so that you have a unique script name. E.g.: MyCampaignScript.evoscript.
2. Open Developer.NET by double clicking on the .evoscript file.
3. From the solutions explorer, select the main mode corresponding to the project and access its properties by clicking on the mouse right button or with ALT>+<INTRO>.
4. Make sure that "Display type"=developerService and edit the "Display through the web service | Web Service" property so that it points to the Omni+ server. E.g.: http://192.168.0.101/Omni+/DeveloperService/DeveloperService.svc
5. Select the script start page with the "Start Page" property.
6. Press "Accept" to close the property pages.
7. Save changes made to the file with the "File | Save all" menu option.

8. Edit the script by adding, modifying, or removing controls from the script page. See the “Developer.NET Reference Manual”.
9. Once you have finished building the script, publish it to the Omni+ server with the “Generate | Generate <script-name>” menu option. E.g.: “Generate MyCampaignScript”.

When a Developer.NET script is published to the server, you are required to indicate an Omni+ administrator password and username, for example: NCADMIN. If the script already exists, a confirmation to overwrite it will be requested.

10. Make sure that the results window is visible with the command “See | Results” from the menu and verify that it has been properly generated.

Now we can relate the script to one or more campaigns.

11. Start Manager and identify yourself as an administrator.
12. Access “Administration | Scripts” and verify the new script has been automatically recorded on the list. For example: “MyCampaignScript.”
13. Set up the campaign with “Administration | Campaigns,” select the campaign and select the drop-down parameter named “application” with the new script. For example: “application= MyCampaignScript.”
14. When the agents receive a call from the campaign, iagent will show the new script that we have created.

See “Omni+ Developer.NET Reference Manual.”

6.7.3 HOW TO DEVELOP A SCREEN-POP-UP SCRIPT FROM THE ANI

When iagent runs a script, it transfers data to the campaign and to the related call. The script can use data to do searches on databases and external CRM.

For complete information on Developer.NET, the script development environment, see the “Omni+ Developer.NET Reference Manual.”

There are several forms to create a script showing client data from the telephone number. The person in charge of developing the scripts must consider the different technical and business aspects.

In general, the following generic procedure must be followed:

1. Run Developer.NET and access “File | New | Project.” Select the appropriate template (e.g.: “Basic”), write an appropriate value for the Name (e.g.: “MyScreenPopup”) and for the location of the project. Press “Accept” to create the new project.
2. From the solutions explorer, select the main mode corresponding to the project and access its properties by clicking on the mouse right button or with ALT>+<INTRO>.

3. Make sure that “Display type”=developerService and edit the “Display through the web service | Web Service” property so that it points to the Omni+ server. E.g.: http://192.168.0.101/Omni+/DeveloperService/DeveloperService.svc
4. Select the script start page with the “Start Page” property.
5. Press “Accept” to close the property pages.
6. Save changes made to the file with the “File | Save all” menu option.

The scripts include the “Omni+ Library” that allows the development of Omni+ scripts. Among other options, it allows access to call data, transaction data and client record.

7. Edit the script page where you want to read and use “ANI.” For example, open the “start.aspx” page.
8. From the bottom tabs, “Design | Divide | “Code,” select the “Code” view.
9. Identify the Sub Page_Load function. Note: It is normally at the end of the file.
10. Schedule the necessary appointments based on data from this variable.
11. Edit the script by adding, modifying, or removing controls from the script page. See the “Developer.NET Reference Manual.”
12. Once you have finished building the script, publish it to the Omni+ server with the “Generate 1 Generate <script-name>” menu option.

Before publishing it, make sure the script name is unique. When a Developer.NET script is published to the Omni+ server, any previous script having the same name will be overwritten.

13. Make sure that the results window is visible with the command “See | Results” from the menu and verify that it has been properly generated.

Now we can relate the script to one or more campaigns.

14. Start Manager and identify yourself as an administrator.
15. Access “Administration | Scripts” and verify the new script has been automatically recorded on the list.
16. Set up the campaign with “Administration | Campaigns,” select the campaign and select the drop-down parameter named “application” with the new script.
17. When the agents receive a call from the campaign, iagent will show the new script that we have created.

See “Omni+ Developer.NET Reference Manual.”

6.8 CAMPAIGN DIAL-UP MODES

Omni+ supports different dial-up modes, that are associated to one campaign: Preview, Automatic Preview, Progressive, Predictive and Agentless dial-up.

In the progressive and predictive modes, the system will only transfer the successful contacts to the agents and the unsuccessful attempts will be automatically managed. The “agentless” dial-up mode starts calls that will be automatically answered by in IVR defined through a DBR-script.

The predictive dial-up determines the best time to make every contact and allows to increase up to 300% of the useful contacts.

DIAL-UP MODES	DESCRIPTION
Null	No outbound phone calls are made in this campaign.
Preview	First, users receive the application screen with the client data and when they are prepared, they start contact.
Automatic Preview	Similar to the "Preview" mode, but the application starts a call while showing the data.
Progressive	The dial-up module starts calls pro-actively, only transfers to agents the calls that have been answered while transferring the client corresponding file, and automatically manages the call disposition with a telephone event (connects, no answer, fax, etc.). New calls are started as the agents are finishing their previous management tasks.
Predictive	The dial-up module starts calls pro-actively, only transfers to agents the calls that have been answered while transferring the client corresponding file, and automatically manages the calls call disposition with a telephone event (connects, no answer, fax, etc.). New calls are started from statistical algorithms that foresee the moment in which the previous management tasks will end.
Agentless	The dial-up module starts calls that will be automatically answered by the system, preferably through a script. New calls start as the scripts finish processing the previous tasks (for example: transferring to an agent).

6.8.1 HOW DOES THE PROGRESSIVE DIAL-UP MODE WORK?

If the campaign is in **progressive mode**, every time the agent becomes available, the system will start a new calling process.

The system will calculate the contacting potential, and it will decide the amount of simultaneous calling processes to be started (1,2, 3…).

For each of this calling processes:

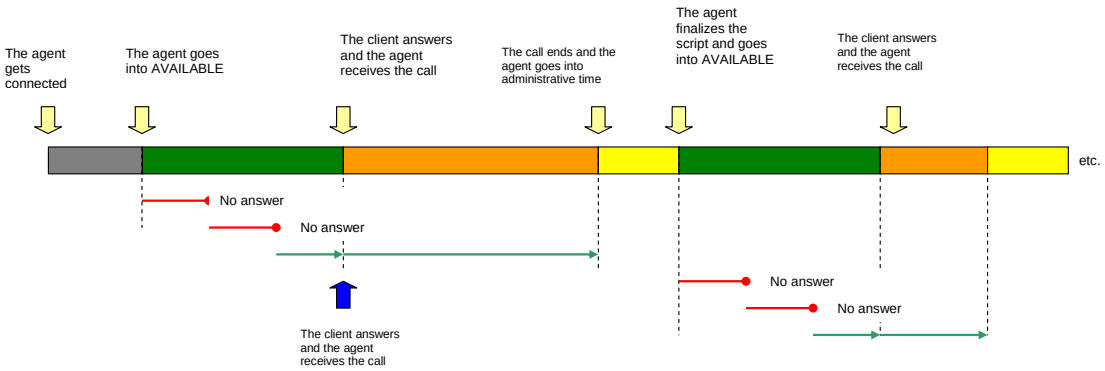
1- The following client record is selected.

2- The phone call is made.

a) If the call is answered, it remains in QUEUE and an agent is expected to answer it. At this time, the process finishes.

b) If the call does not proceed (does not answer, does not connect, etc.) the record is automatically marked with the corresponding call disposition (e.g.: “1-No Answer,” “5-Connecting,” etc.) and it goes back to the beginning, selecting a new record.

c) If the call proceeds, but the client has abandoned it while in queue, it is automatically recorded with the corresponding call disposition “10-Abandoned” and the system goes back to start, selecting a new record.



If several calls have been launched, when the first positive call is detected, the remaining processes will stop making calls, but the calls already answered will not be disconnected. The reason not to end these calls is that they might have already annoyed the client (ring) and, in plus, if they were positively answered, other agents could make the most of them. Besides, the system is able to consider these calls as additional and assign them to another agent.

6.8.2 HOW DOES THE PREDICTIVE DIAL-UP MODE WORK?

If the campaign is in **predictive mode**, it is the system that decides the ideal time (generally a bit before the script's end) and the amount of simultaneous calling processes to be started (1,2, 3…).

Therefore, the calling processes can be started even BEFORE the agent finishes the previous management tasks, based on a prediction of the duration of these tasks and on a prediction of the time the agent will take to get a positive answer from a client.

The system starts one or more simultaneous calling processes when the predictive algorithm decides that the ideal time has come or when the agent becomes free and available (whichever comes first).

For each of this calling processes:

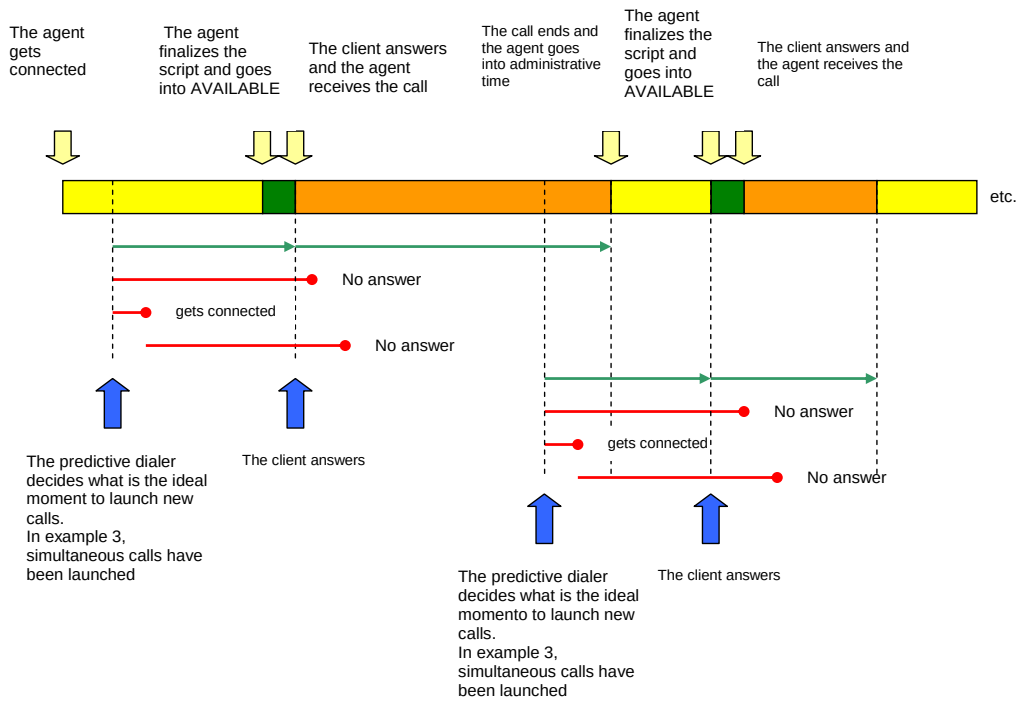
3- The following client record is selected.

4- The phone call is made.

d) If the call is answered, it remains in QUEUE and an agent is expected to answer it. At this time, the process finishes.

e) If the call does not proceed (does not answer, does not connect, etc.) the record is automatically marked with the corresponding call disposition (e.g.: "1-No Answer," "5-Connecting," etc.) and it goes back to the beginning, selecting a new record.

f) If the call proceeds, but the client has abandoned it while in queue, it is automatically recorded with the corresponding call disposition "10-Abandoned" and the system goes back to start, selecting a new record.



If several calls have been launched, when the first positive call is detected, the remaining processes will stop making calls, but the calls already answered will not be disconnected. The reason not to end these calls is that they might have already annoyed the client (ring) and, in plus, if they were positively answered, other agents could make the most of them. Besides, the system is able to consider these calls as additional and assign them to another agent.

6.8.3 HOW DOES THE "AGENTLESS" DIAL-UP MODE WORK?

If the campaign is in the **agentless mode**, the system starts a new calling process to try to get a positive call and process it with a DBR Script.

This process consists of:

1- The following client record is selected.

2- The phone call is made.

3- If answered, the call is processed until the end of the script. (The script can consist of placing the call in queue so that an agent takes it in which case he/she will finalize the script).

4- If the call does not proceed (does not answer, does not connect, etc.) the record is automatically marked with the corresponding call disposition (e.g.: "1-No Answer," "5-Connecting," etc.) and it goes back to the beginning, selecting a new record.

If the call proceeds, but the client has abandoned it while in queue, it is automatically recorded with the corresponding call disposition "10-Abandoned" and the system goes back to start, selecting a new record.

6.9 LISTS AND STATUS

For the organization and control of how the contact issuance campaigns evolve, Omni+ provides sorting of clients' records into lists and status.

6.9.1 LISTS

Client records in a campaign are organized according to the following lists:

LISTS	DESCRIPTION
0-NON-CALLBACK	These are the calls without a specific date/time to be made. The order in which these calls are made is arbitrary. After the system upload, all contacts that have been registered display non-callback calls.
1- SYSTEM CALLBACK	These are the calls for which the date/time to call back has been determined by a "call in N number of minutes" call disposition type or by a "Agent Callback" call disposition type, but in which the call-back time/date has not been specified.

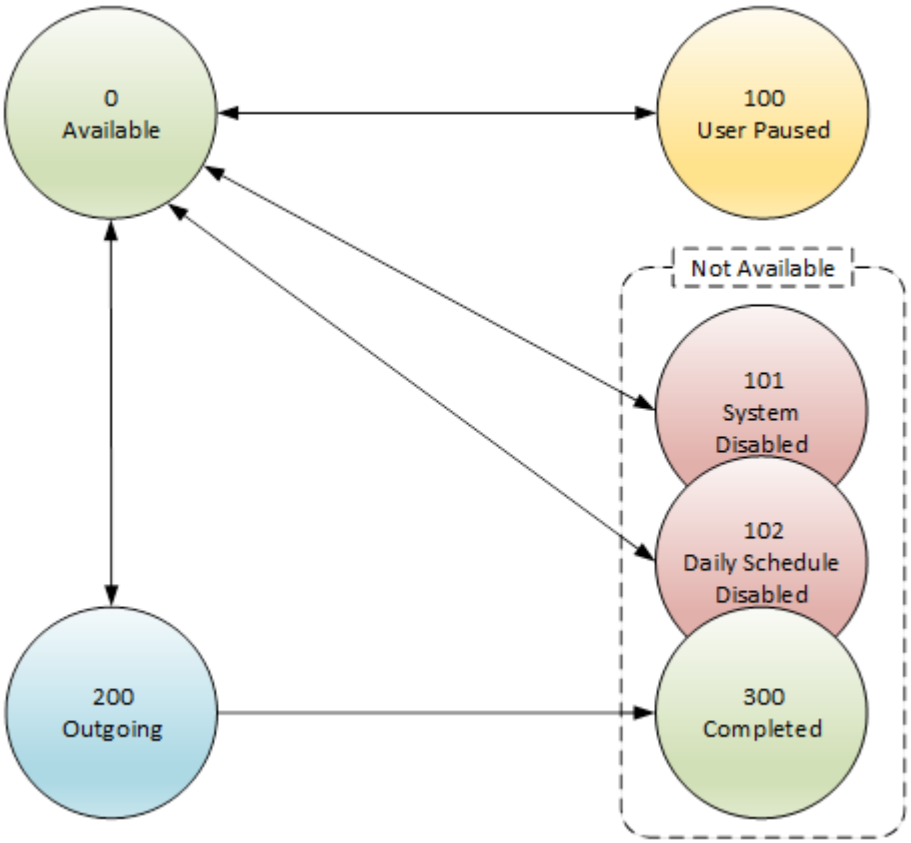
LISTS	DESCRIPTION
	When a transaction is closed with a system call disposition (except in the case where the call disposition is of the “No more calls” type), either if the agent has determined the call disposition or if an autodialer system has done it, the call-back date/time set to contact the client related to the transaction is determined based on the configuration of the assigned call disposition and the call goes to the list of system callback.
10- AGENT CALLBACK	These are calls for which the callback date/time has been determined by the agent through a call disposition of the “ agent call back” type. It is possible transfer the agent callback contacts to the Non-Callback contacts by pressing on the Non-Callback. In Manager.

In outbound campaigns, the server extracts the client records always starting by the list of agent callback calls; then, it will start allocating records to the other two lists in the proportion that has been established with Manager (by default, the records system callbackhave priority).

6.9.2 STATUS OF A RECORD

A record within a list can have different statuses:

STATUS	DESCRIPTION
0-Available (Eligible)	It can potentially be elected by a dial-up process.
100-Paused-User	It has been paused by a user (supervisor or administrator)
101-Closed-System	It has been closed by the system. The typical cause is to go over the maximum number of attempts set up by the contact or by consecutive call dispositions.
102-Closed due to daily planning	A call has been planned outside of the authorized time slot and the campaign was set up in “daily planning = Manual” mode, therefore, it was closed.
103-Manual closing	The record goes into this status through an external application or process.
200-Ongoing (Open transaction)	At this moment, the contact has a related open transaction .
300-Finalized	It has been finalized through a “do not call back” call disposition type.



Status models

The records under the "valid date pending" status are those for which the start date indicated in the record list has not been attained yet. By default, this date matches the campaign start date. These records are in status=0.

The records are usually assigned to the system; therefore, they can be managed by any user.

However, it can be interesting to assign records to specific agents under certain circumstances. This is performed through call disposition of the "assign to the agent" type.

In a campaign with the PROGRESSIVE or PREDICTIVE dial-up mode, the records that are assigned to an agent are managed by the agent in the PREVIEW mode,

6.10 CLIENT RECORDS

Based on Omni+'s perspective, a client or 'subject' is a person that can be contacted one or several times throughout a campaign.

Information relevant to the clients is kept in the client record, and can be entered into Omni+ before launching the campaign or once it has started.

Data from the clients stored in Omni+ allows us to:

- Identify the client within the applications or scripts.

- Define the characteristics specifically related to a client in order to better manage the campaigns. For example, it is possible to indicate the hours in which a specific client is accessible.

- Link the Omni+ client data with the external business database in order to provide statistics with information from both fields.

Every client is related to the following logic entities:

- **CLIENTES**: Database tables with a pre-established structure, it contains business data that can be reported during the records upload. Most of the fields are optional.
- **ADDITIONAL CLIENT DATA (`tbDatosCliente`):** This is a structure that allows to store an arbitrary number of additional data in a flexible manner. The usage of "additional data from the client" is optional and complements the client `table`. The additional client data can be reported during the record upload or can be created dynamically through a script.
- **LOCATORS (`tbLocalizadores`):** Database table storing multiple locators that can be associated with every client. It is optional if only one telephone is used and, in this case, it can be changed for the `telephone` field of the `clients` table.
- **`tbIdentidadSujetoCampanya`:** Table used internally by Omni+ to manage the lists and callbacks records. This table is frequently named with the abbreviation "ISC" within this documentation.

6.10.1 WHAT IS THE ADDITIONAL CLIENT DATA?

Besides the client data, any other additional data of interest can be added to the Omni+ data module. Omni+ saves all the additional information in the **`tbClientData`** table and can be accessed and modified easily from the script or from an external application.

Typically, these additional data contain:

- **Business information** associated to the client that the agent needs to see through the script. For example, in a survey application, we could include the questions we are going to make to every client.
- **Information on the result of the interaction with the client.** For example, in the same survey application of the paragraph above, the answers to the questions given by the client.

For the first case, we might be interested in uploading these additional data when we upload the campaign clients.

6.10.2 CLIENT RECORDS UPLOAD

The record upload process is the process by which the client list and the contacts list to be called is created. The process starts with the clients list along with their related data and, for the indicated campaign, it creates and updates the clients list and generates the contacts list to be called for the campaign.

Omni+ includes a series of tools that help in the process of importing the client data.

During the upload:

1. If the customer does not previously exist in the Omni+ tables, a new record will be inserted.
2. If the customer already exists in the Omni+ tables, the following procedure will be followed:
    a. All customer data will be updated with the new uploaded information.
    b. By default, customer status won't be updated, so for instance if the customer was on a finished state (300) even if the data is updated it will remain on that state (it is not reactivated).

> This behaviour has changed from Omni+ version v10.7. In older versions, customer records were reactivated (their state were set to 0) if their former state were 101, 102 or 300.
>
> If you want to configure the older behaviour or a different one other than the default behaviour, modify accordingly the import module settings (file **ImporterServiceConfig.json**).
>
> In this file, you can set a list of customer states which will be interpreted as:
>
> - If the list is empty (default value) the customer state is not updated. In other words, customer is left with its ancient state.
> - If the list is null, customer is set to AVAILABLE state (0) no matter its ancient state, that is, inconditionally.
> - If the list contains one or more customer states, the customer record will become reactivated (set to 0 state) if its former state was one in that list, e.g. if we want to configure the importing process behaviour for versions older than v10.7, the list should be [101, 102, 300].

    c. If the customer record already has a list of locators (phone numbers), the uploaded phone list will replace entirely the older one.

The UPLOAD process is performed in the background through the Task Daemon module.

During the UPLOAD, the IMPORT_CLIENTS telephone field and the IMPORT_LOCATORS locator field are organized, removing the following characters: <space>, - (hyphen), _ (underline), (and) (parentheses), . (period).

If after this filter the field to be imported contains non-numeric characters (0-9) or the record is empty, it will be discarded.

Keep in mind the following notes on the locator fields:

- Duplicated locators are not admitted.
- Records not having any valid locators or a reported client.telephone field will not be uploaded.

The upload requires the campaign to be in ACTIVE status.

In every campaign, the originalid of client records is unique. The combination {ORIGINALID, CAMPAIGNID} identifies unequivocally a client record.

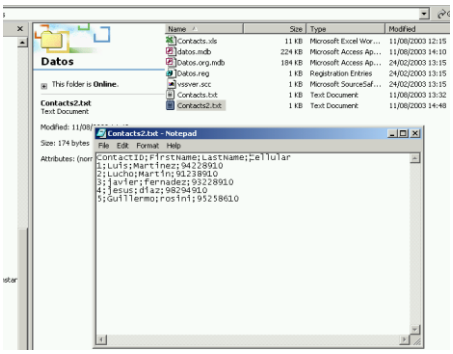
6.10.3 HOW TO UPLOAD CLIENT RECORDS FROM MANAGER

Manager allows to upload client records from an ODBC data source named "DATA." When the Omni+ server is installed, this data source is previously set-up to read CSV files (comma separated values) from Manager´s data directory (by default: `C:\inetpub\wwwroot\manager\Data`).

To upload a CSV file with clients records, proceed with the following steps:

Upload a CSV file

1 Verify the CSV file with the client data. Verify that the character separating is ';' (semi-colon) and that the first data row contains the columns names.



Identify what columns contain the following necessary data for Omni+:

- Originalid: Client Code or ID
- Name
- Telephone

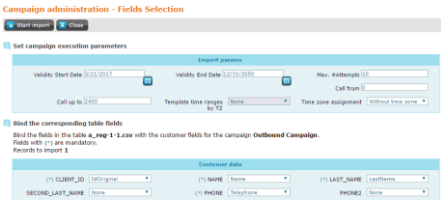
The csv file will also have to contain the business fields that are required by the scripts.

It can optionally include the following fields:

- Segment attribute
- Priority

You can also add a CSV file from two different locations:

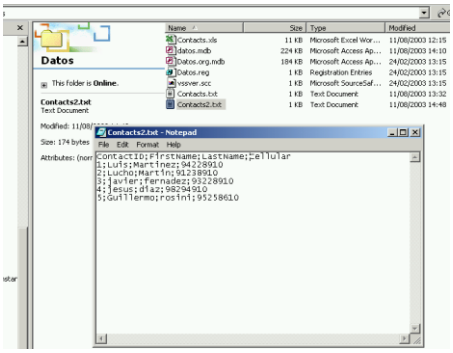
- From Manager access the campaign management, select the [import clients] button and, in the "CSV" tab, select "Add a CSV file".
- From Manager go to campaign management and select the "CSV Management" button. In the resulting screen you can add a CSV file.

	In both cases, you can select the tab of the fields and the file to add.	
2	Copy the CSV file in the Manager data directory. E.g.: C:\inetpub\wwwroot\manager\Data	`copy my-leads-list.csv c:\inetpub\wwwroot\manager\Data`
3	From Manager access the campaign management, select the [import clients] button and select the CSV file that you can want to upload.	
4	Select the desired fields. Max. # #Attempts (Maximum number of attempts) to establish a contact. Once you go over that number, the contact is taken out of the list. By default, the system specifies 10 attempts. This counter is increased every time a defined call disposition with Contacted equals “No” (except for the system call disposition 17- Call-back interval out and 18- Agent assigned is not active) and it is reset every time a defined call disposition is applied with Contacted other than “No.” “Link the table fields xxxx with the client fields for the xxxx campaign. The fields with (*) are mandatory.”	
5	Press the [start import] button. With this a second process, will start and this will be processing the records and uploading them in the Omni+ table structure.	
6	When this process ends, an entry will be written in Manager | Events reporting the result.	

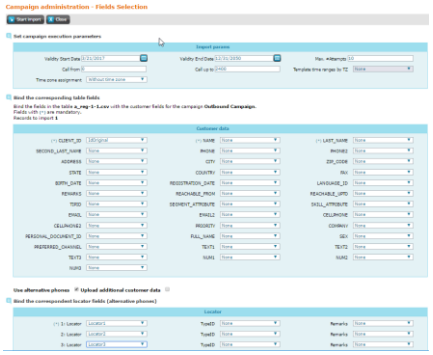
6.10.4 HOW TO UPLOAD CLIENT RECORDS WITH ADDITIONAL DATA FROM MANAGER

To upload a CSV file with additional client records, proceed with the following steps:

Upload the CSV file with additional data from the client

1	Verify the CSV file with the client data. It is recommended to verify that the character separating is ';' (semi-colon) and that the first data row contains the columns names. Identify what columns contain the following necessary data for Omni+: ○ Originalid: Client Code or ID ○ Name ○ Telephone The CSV file will also have to contain the business fields that will be used by the scripts. It can optionally include the following fields: ○ Segment attribute ○ Priority	
2	Copy the CSV file in the Manager data directory. E.g.: C:\inetpub\wwwroot\manager\Data	`copy my-leads-list.csv c:\inetpub\wwwroot\manager\Data`
3	From Manager access the campaign management, select the [import clients] button and select the file that you can want to upload.	

4 Select the mandatory fields for the clients table: Originalid, Name, Lastnamel1, Telephone (if no alternative telephones are used).



"Relate the table leads-list.csv with the client fields for the xxxx campaign.

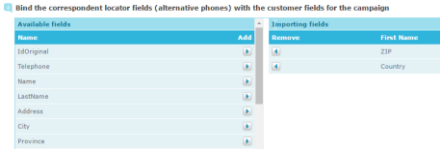
The fields with (*) are mandatory."

If the CSV fields have the same name that the fields in the client table, Manager will match these fields automatically.

For the locators, the fields will be: LocatorX, IDTypeX and CommentsX where X is the locator number, from 1 to 8.

The additional data is not automatically assigned.

5 Activate the "Upload client additional data" option



Add the "available fields" required to be part of the "fields to be imported" list.

These fields will be uploaded in the `tbClientData table`.

6 Press the [start import] button.

With this a second process, will start and this will be processing the records and uploading them in the Omni+ table structure.

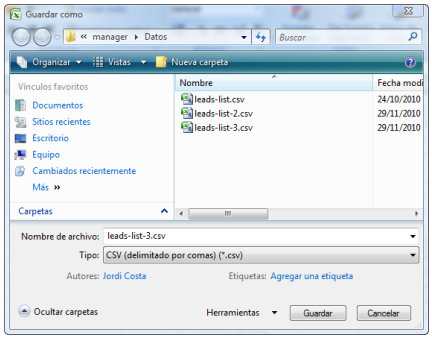
7 When this process ends, an entry will be written in Manager | Events reporting the result.

The client additional data is stored in the Omni+ data model through a key scheme – value. The key is the name of the selected field and the value is its content for every client that matches.

6.10.5 HOW TO PREPARE A CSV VALUE FROM MS EXCEL 2007

Example to be created from MS Excel.2007.

HOW TO PREPARE A CSV FILE FROM MS EXCEL 2007

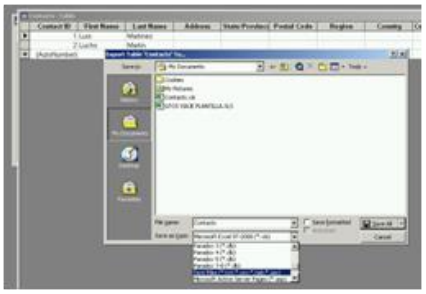
1	Make sure the EXCEL spreadsheet includes a top first row with the proper columns names.	
2	Select “Save as… | Other formats” and select Type:CSV (delimited by commas) (*.csv).	
3	Verify that the CSV file generated uses the character separating expected (‘;’) and copy it to the Manager data upload directory.	

6.10.6 HOW TO PREPARE A CSV FILE FROM MS, ACCESS

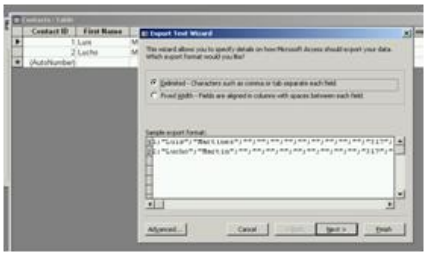
Example of how to create it from Ms ACCESS

HOW TO PREPARE A CSV FILE FROM MS ACCESS

1 Create a file from the **Export** menu.

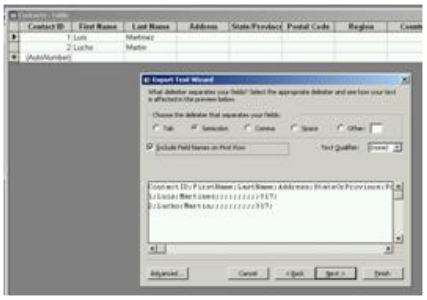


2 Choose the "Fields delimited by characters" option.



3 Choose the following options:

- Delimited by semi-colon, with head titles having the field names in the first row and with no qualifier (no simple or double quotation marks).



4 Save the file and copy it in the Manager data upload directory.

6.10.7 HOW TO UPLOAD CLIENT RECORDS FROM SQL TABLES

If the client record uploads are repetitive or periodical, it can be useful to automatize them through the usage of intermediate tables

Record upload from SQL tables		
1	Using any valid tool, upload the data in the intermediate table IMPORT_CLIENTS. You can optionally upload data in the IMPORT_LOCATORS and IMPORT_CLIENTDATA tables.	
2	Run the stored procedure `sp_carga()` reporting the campaign id that you wish to load with the parameter campaignid.	E.g.: `exec sp_carga 100000003`
3	With this a second process, will start and this will be processing the records and uploading them in the Omni+ table structure.	
4	When this process ends, an entry will be written in Manager | Events reporting the result.	

6.10.7.1 STRUCTURE OF IMPORT_CLIENTS TABLE

IMPORT_CLIENTS			
NAME	**TYPE**	**SIZE**	**NULL**
IDTYP	Numeric	2	NO
ORIGINALID	Varchar	36	NO
Campaignid	numeric	10	NO
NAME	varchar	20	NO
LASTNAME1	varchar	40	NO
LASTNAME2	varchar	40	
ADDRESS	varchar	40	
POPULATION	varchar	40	

ZIP CODE	varchar	5	
PROVINCE	varchar	30	
COUNTRY	varchar	30	
TELEPHONE	varchar	16	
TELEPHONE2	varchar	16	
FAX	varchar	16	
EMAIL	varchar	50	
EMAIL2	varchar	50	
MOBILE	varchar	16	
MOBILE2	varchar	16	
BIRTH_DATE	datetime	-	
REGISTRATION_DATE	datetime	-	
LANGUAGE_ID	numeric	2	
COMMENTS	varchar	255	
ACCESSIBLE_FROM	numeric	4	
ACCESSIBLE_UNTIL	numeric	4	
SDNI	varchar	50	
TEXT1	varchar	50	
TEXT2	varchar	50	
TEXT3	varchar	50	
nPreferentialChannel	numeric	2	
NUM1	numeric	10	
NUM2	numeric	10	
NUM3	numeric	10	
Segment_Attribute	nvarchar	50	
PRIORITY	numeric	5	

- ORIGINALID

- It is a unique external key.
- It must be unique per campaign, for example the DNI or the “client code.”

- CAMPAIGNID
  - It is the campaign Id in which the upload needs to be done, the campaign Id can be looked up from Manager.
- TELEPHONE
  - The telephone number that is going to be contacted, without any spaces or any non-numeric characters. If this field is reported, it will be considered as the mandatory telephone and no LOCATORS will be used.
- ACCESSIBLE_FROM
  - Numeric value corresponding to the contact start hour for the record:
  - If not reported, the upload process enters 0000 (0:00 hours).
- ACCESSIBLE_UNTIL
  - Numeric value corresponding to the time the contact ended for the record:
  - If not reported, the upload process enters 2400 (24:00 hours).
- SEGMENT_ATTRIBUTE
  - Alphanumeric value of the segment attribute.
  - It will allow that segments be defined later in the campaign starting from the different values of Segment_Attribute.
- PRIORITY
  - It indicates the priority (or order) in which this contact will be delivered to the agents.
  - If not reported, the upload process enters 0 (Zero).

6.10.7.2 STRUCTURE OF IMPORT_LOCATORS TABLE

IMPORT_LOCATORS			
NAME	**TYPE**	**SIZE**	**NULL**
ORIGINALID	Varchar	36	NO
Campaignid	Numeric	10	NO
OrderN	Numeric	10	NO
TypeID	Numeric	2	

Locator	Varchar	36	
Comments	varchar	250	

- ORIGINALID
  - It is a unique external key.
  - It must be unique per campaign, for example the DNI or the “client code.”
- CAMPAIGNID
  - It is the campaign Id in which the upload needs to be done, the campaign Id can be looked up from Manager.
- ORDERN
  - It must be unique for a client (ORIGINALID) and a campaign (CAMPAIGNID).
  - It indicates the locator priority within the client locators for a campaign.
  - The main priority is O.
- TYPEID
  - Telephone type (locator): 0 for “Unknown,” 1 for “Landline,” 2 for “Mobile.”
- LOCATOR
  - The telephone number that is going to be contacted, without any spaces or any non-numeric characters.

6.10.7.3 STRUCTURE OF IMPORT_CLIENTDATA TABLE

IMPORT_CLIENTDATA			
NAME	**TYPE**	**SIZE**	**NULL**
ORIGINALID	Varchar	36	NO
Campaignid	Numeric	10	NO
Key	Varchar	40	NO
Value	Varchar	250	

- ORIGINALID
  - It is a unique external key.

- It must be unique per campaign, for example the DNI or the “client code.”

- CAMPAIGNID
  - It is the campaign Id in which the upload needs to be done, the campaign Id can be looked up from Manager.

- KEY
  - It is the name of the additional data field. There cannot be two identical keys for the same client.

- VALUE
  - It is the previous data field value.

6.10.7.4 EXAMPLE OF CLIENT IMPORT

Example of client import

```
1   insert into import_client (
            ORIGINALID,
            CAMPAIGNID,
            TELEPHONE,
            NAME,
            LASTNAME1,
            ACCESSIBLE_FROM,
            ACCESSIBLE_TO)
    values (
            '00001',
            100000044 ,
            '310',
            'Peter',
            'Parker',
            0000,
            2400)
```

```
2   insert into import_locators(
            ORIGINALID,
            CAMPAIGNID,
            ORDERN,
            TYPEID,
            LOCATOR,
            COMMENTS)
    values (
            '00001',
            100000044,
            0,
            2,
            '639020985',
            'Personal mobile')

    insert into import_locators(
            ORIGINALID,
            CAMPAIGNID,
            ORDERN,
            TYPEID,
            LOCATOR,
            COMMENTS)
```

```
values (
        '00001',
        100000044,
        100,
        2,
        '655043985',
        'Work mobile')

insert into import_locators(
        ORIGINALID,
        CAMPAIGNID,
        ORDERN,
        TYPEID,
        LOCATOR,
        COMMENTS)
values (
        '00001',
        100000044,
        200,
        1,
        '935558521',
        'Home')
```

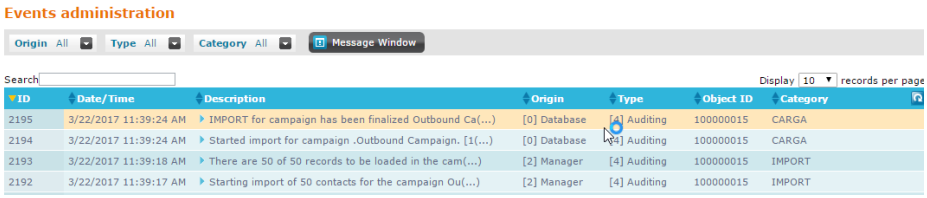
3

```
INSERT INTO IMPORT_CLIENTDATA
           ([OriginalId]
           ,[CampaignId]
           ,[key]
           ,[value])
     VALUES (
        '00001',
        100000044,
        'MonthSales',
        '5'
        )
```

4

```
exec sp_Upload 100000044
```

5 Finally, revise the Events in Manager Administration:



6.10.8 HOW TO EXPORT CLIENT RECORDS USING SQL

The client data export can be performed accessing the tables of the Omni+ data model. Being an open data model, it is possible to access directly to this information from another application.

In order to perform a campaign client export, the Omni+ clients table must be accessed, and a specific data campaign must be exported.

The **TBCAMPAIGNSUBJECTIDENTITY** table relates clients to the campaign they belong to.

The **CLIENTS** table has **Subjectid** as a primary key (unique key). The **Subjectid** column stores the external key that can be repeated in different clients or from different campaigns.

The record upload process guarantees that there are no duplicated **Originalid** for the same campaign.

The **CLIENTS** and **TBCAMPAIGNSUBJECTIDENTITY** tables are read-only; they must not be modified in any case.

Client export uses Omni+ sensitive tables, so these operations must be performed outside of working hours.

Example of Client Export

1 Example: The first 10 campaign clients 100000040:

```
Select top 10 isc.*, c.* from clients as c
join tbcampaignsubjectid as isc on (c.subjectid=isc.subjectid)
where isc.campaignid= 100000044
```

2 Example: Obtain the value of the client additional data “MonthSales” for the first 10 clients of the campaign 100000040:

```
Select top 10 isc.*, c.*, dc.value AS MonthSalesfrom clients as
c
join tbcampaignsubjectidentity as isc on
(c.subjectid=isc.subjectid)
LEFT JOIN tbDataClient AS dc ON (c.subjectid=dc.subjectid)
where isc.campaignid = 100000076 AND dc.clave='MonthSales'
```

6.11 MANAGEMENT OF MULTIPLE TELEPHONES PER CLIENT

Today, it is very important to be able to locate your clients fast, either at a home telephone, mobile, work, etc. When automatically managing the phone calls in alternative telephone numbers, you will be able to reach your clients much faster.

Therefore, one of the most interesting features of Omni+ is the ability to manage multiple telephone numbers or locators for one client.

We can introduce, modify or cancel contact telephone numbers at any time of a record life cycle in Omni+, that is during a campaign upload through the Manager application, through a script o through an external application from a third party.

Telephone numbers associated to a client consist of an organized list of telephone numbers. In the list of telephone numbers associated to a client, we can mark up a telephone as the main number. This way, we can schedule the first call to this main telephone number and attempt phone calls with the remaining telephone numbers associated to the client.

The call disposition can be set up to decide what telephone number will be used in the next call:

- **Call the current telephone number** (the call will be made to the same telephone number that has just been dialed).
- **Call the main telephone number.**
- **Call the next telephone number immediately.** The next telephone number on the list will be immediately dialed, starting from the one right after the number that has been used.

In the "No more calls"-type call disposition, it can be specified not to call the telephone number again (the telephone number used is deregistered and is no longer used to contact the client) or not to call the record again (the client is deregistered so he/she will no longer be contacted).

> This definition of call disposition allows us to perform tasks such as to schedule a call to a client and, if he/she does not answer, can try again with the next telephone number on the list and, if there is no answer, try a third time with the next number on the list and so on until we have tried with all the numbers related to the client. These attempts are immediately executed, i.e., the system attempts to contact the client as a person would do it. If someone does not answer, for example, at the home telephone number, I can try with a work telephone number and if I do not get to contact anyone, I can try again on the mobile. But it seems obvious that it is important that these attempts are done in a short period of time since we are interested in contacting the client precisely at this moment. Therefore, the "No answer" call disposition of the Omni+ system is preset as "Call the next telephone number immediately."

Omni+ understands the "client telephone" field (`client.telephone`) in a special way. When this field is advised, it makes that the remaining telephone numbers related to the client are ignored and the call is inevitably made to this telephone number. This can be very

convenient for specific applications to “force” the call to a telephone number in particular. By deleting this telephone number, the system restarts the management of multiple standard telephone numbers.

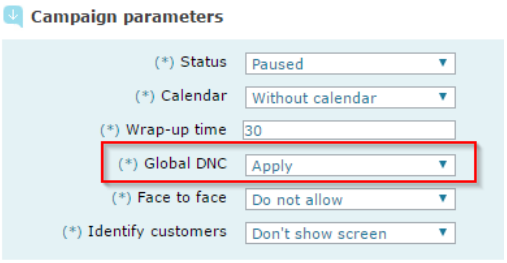
From Manager, we can visualize the telephone numbers list related to the client and we can add, modify, deregister or reinstate these telephone numbers.

6.12 MANAGEMENT OF DNC LISTS (DO NOT CALL)

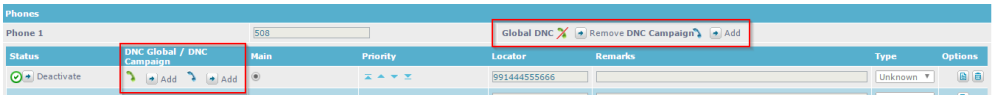
Omni+ allows to keep a telephone number list to which campaign calls will not be launched. This list is directly managed in the database through the tabletbDoNotCall (it has two fields: Locator and CampaignId).

Each table locator will be linked to the global list (CampaignId = 0) or to a specific campaign.

Before launching a campaign call, it is always verified that the locator is in the campaign list. While managing the Manager campaign, it can be established if the global list also needs to be verified.



In the customer information page, you can see if a customer has it telephone number or locators in the global list or in the campaign and these can be added or removed from these lists.



6.13 ADJUST ANNOYING CALLS

Omni+ allows to set limits to be applied in order to determine that a call is abandoned or annoying and, based on that adjustment, it can set a limit for the predictive dial-up speed.

In order to perform these adjustments, applicable to so many companies as desired, there are:

Name: Descriptive name of the adjustments to be performed.

Description: Short description.

Max.T. Reten: Set up or not. Time in hours, minutes, seconds and milliseconds (h, m, s, ms). This parameter determines the maximum retention time for the call to be considered as annoying.

Min.T Aband: Set up or not. Time in hours, minutes, seconds and milliseconds (h, m, s, ms). This parameter determines the maximum retention time for the call to be considered as Abandoned. With this parameter, there is an attempt to treat calls that hang up quickly as not being annoying.

Annoying Rate Days: Number of days that will be used to calculate the percentage of annoying calls, along with the "Obj % annoying" parameter defined in the Campaign Telephony Parameters will affect the rhythm of predictive dial up.

As an aid to verify the status of the annoying calls percentages, there are two indicators available:

Manager → Campaign Supervision → Campaign → Dialer → Annoying Call Panel

Manager → Reports → Transactions:

- 100000082-Calls list: Detailed list of dialer calls. Transactions.
- 100000081- Annoying calls rate (Field): Annoying calls number and rate broken down by campaign. Transactions.

6.14 CALL DISPOSITION AND CALLBACKS

Omni+ allows a complete management of sophisticated calls and call-back cycles making up the necessary platform to develop proper telemarketing policies.

These cycles are specified based on the campaign call disposition_.

A call disposition is an action related to the closing of a contact managed by the platform and that allows carrying out the callbacks, lists changes and contact status changes.

Each campaign has a series of previously system-defined call dispositions (id<100) and an arbitrary series of specific call dispositions (id≥100). The system call dispositions can be modified to adapt the necessities of a specific campaign.

A call dispositions has the following attributes:

PARAMETER	DESCRIPTION
Code	Numeric code identifying the call disposition of the business we expect to create. The codes defined by the user must have a ≥100 code.
Description	Short description of 30 characters max.
call disposition type	One of the following: **“No more calls to the Telephone"**: Deregisters the current telephone, and if it's the last active telephone, it will deregister the contact. **"No more calls to the Record"**: The contact is not callback, and no more calls are made unless reimported. The contact remains in STATUS=FINALIZED. **“Call in N minutes"**: The contact is replanned to be calledback in N minutes from the current time. The contact goes to the SYSTEM CALLBACK LIST. **“Agent Callback"**: The contact is replanned to be called in N minutes or on the date/time specified by the agent. The contact goes to the AGENT CALLBACK LIST. **“Pass to Non-callback**": Client is replanned for a callback but without a fixed date or time in the NON-CALLBACK list. **“Call Tomorrow"**: Callback tomorrow, at the current time. **“Do nothing"**: No action is made with the record.
Contacted	One of the following: **“NC"**: client has not been contacted. **“SC-"**: Negative useful contact. The client has been contacted but it is not considered useful. **“SC+"**: Positive useful contact. The client has been contacted and it is considered useful. “**NSC**": Non-useful contact. A person has been contacted but it is not considered a useful contact (for example, because we have not been able to speak to the person we wanted to). Considering a contact positive or negative depends on the business rules. For example, in a tele-sales campaign only those call disposition which imply the effective sale of the product are considered useful.
Allocation	**“To the agent"**: callback is allocated to the same user executing the call disposition. **“To the group"**: allocated to any agent available **“By default"**: allocated to whoever is currently allocated.
Minutes	If the final is of the "Call in N number of minutes" or "No more calls to the telephone" type, specify the number of minutes to call the client back. In the case of "No more calls to the telephone" as long as the client has alternative telephones on the database. For a final of the "Agent Callback" type, specify the number of minutes to call back within the "punctuality interval."
Max. Number of Consecutive call disposition	If a greater consecutive call disposition sequence of the same type occurs, the contact goes to a SYSTEM DEREGISTRATION status. In case of zero (0) value, it is not considered.

PARAMETER	DESCRIPTION
Allocated Groups	A call disposition can belong to different groups of call disposition to ease control and statistics.
In the following call, use the telephone...	One of the following: **"Current"**: the next call will be programmed to the same telephone which caused this call disposition. **"Main"**: the next call will be programmed to the main telephone in the alternative telephones list. **"Next, immediately"**: the next call will be made to the next telephone in the alternative telephones list immediately, disregarding all other call disposition rules until the whole list has been covered or any of the calls changes the call disposition.
Priority Adjustment Mode	"Next call": the adjustment applies only to the next call. "Permanent": the client priority is updated by adding his/her priority with the priority adjustment value. Once added, the adjustment becomes 0.
Client Priority Adjustment	Client priority adjustment value. A negative value gives more priority to the record. A positive value takes the priority off the record.

About the priority adjustment

> The "Temporary"" mode is named that way because the adjustment only takes effect after the final application. Let's imagine a client with priority 5 who is applied call dispositions with temporary adjustment 1, 1, 2. In this case, after applying the first final, the client would have an effective priority 6(priority=5, adjustment=1, effective priority=6), after applying the second final, the client would have an effective priority 6 (priority=5, adjustment=1, effective priority=6) and after applying the third final, the client would have an effective priority 7 (priority=5, adjustment=2, effective priority=7). The same example but in "Permanent" mode, the client would have priority 6 (5+1), 7 (6+1) and 9 (7 +2).

Why a negative value gives more priority?

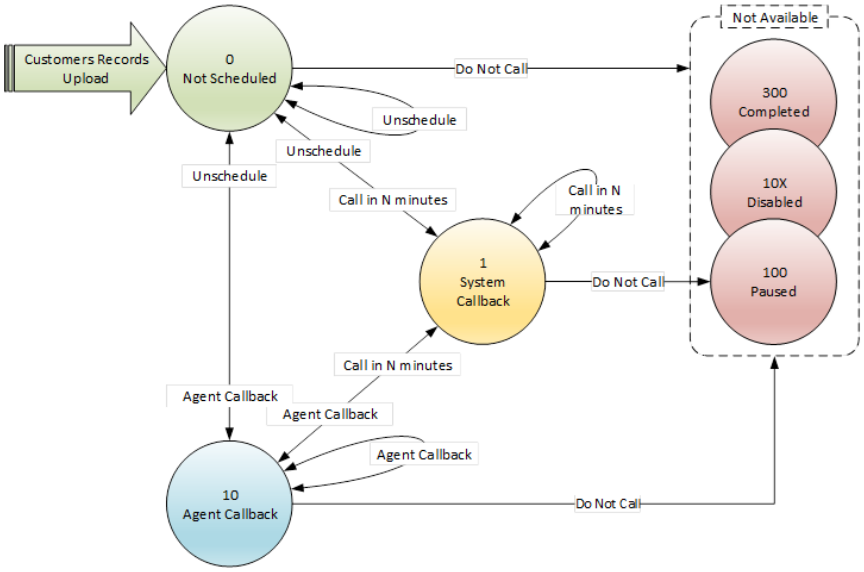
> Because the priority should be understood as an "order within a queue" and the clients **are sorted according to priority in an ascending order**. Thus, the record with the highest prority is the one that has the lowest priority numeric value. When we talk about "priority adjustment," we refer to a parameter that is added to the priority value and the effective priority becomes the result of that addition. Therefore**, a positive priority adjustment makes the effective priority be a higher numeric value and, thus, it takes the importance off of it. The same way, a negative value makes the effective priority smaller and, as a result, it takes the importance off of it**.

It is possible to define **groups of call dispositions**, so that the business reports can be visualized afterwards for these groups. A call disposition can be in more than one group and every group has one or more call disposition.

> For example, it is possible that the "positive" call dispositions group in which the objective has been attained compared with the "negative" call dispositions group, in which for any reason a favorable result has not been reached.

The system generates the system call dispositions by default for each campaign (telephone incidences) and the "system call dispositions" group containing all the call dispositions by default.

> The system call dispositions, and the system groups of call dispositions cannot be deleted. It is not possible to add or remove call dispositions to this group either.

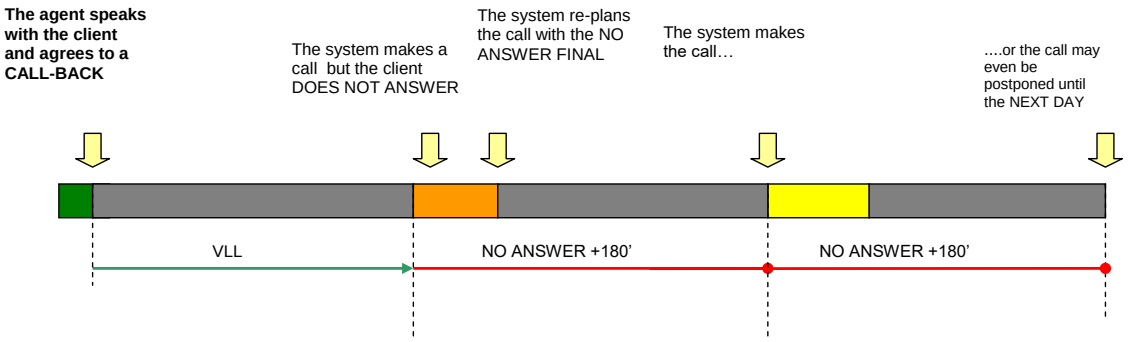


6.14.1 WHAT IS THE PUNCTUALITY INTERVAL?

A frequent operation in a call center is that an agent **callback** a call record under a client's request. For example, the client asks to be called later.

The Omni+ platform manages the call-back from the record and tries again at the time set by the agent.

But if at this time, a telephone incidence happens (no answer, no connection, etc.) and does not contact the client, the record would have a new automatic callback. For example: A NO ANSWER call disposition would typically callback for a couple of hours later, with this, the opportunity to contact the client would be lost.



In order to avoid the negative effect and to increase the possibility of a Useful Contact, the **punctuality interval** concept has been created:

When an agent establishes a CALL-BACK for a record (selected from a "Agent Callback"-type call disposition), the system will dial up the record with a "punctuality interval." During the punctuality interval, the call-back module will try call-back attempts with more frequency

avoiding system callbacks. The time in between attempts will be equal to the parameter *N minutes* of the "Agent Callback"-type call disposition that has generated the punctuality interval. If this parameter N equals 0, **the behavior "punctuality interval" is deactivated**.

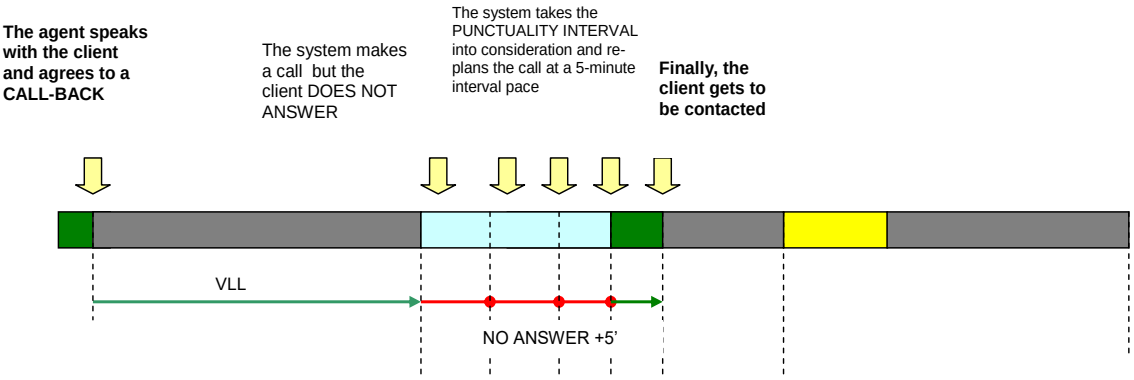
If a record goes out of the "punctuality interval" without having attained a positive contact, the call will be replanned for the next day, at the same time originally planned.

For example, if a call is replanned for 17h and x minutes and the parameter "Call in N number of minutes" of the "Agent Callback"-type call disposition is equal to 5 minutes, we will have the same behavior:

1. The system will make the call to the client at 17:00 h (5PM). If the client answers, we have attained the contact.

2. If there is no answer, the system will avoid using the "call in N number of minutes" value of the "1-No answer" call disposition and will instead reschedule automatically a call-back 5 minutes later.

3. And so on until the client is contacted or, after 18:00h, the call will be rescheduled for the next day at 17h.



By default, the length of the punctuality interval is set in 60 minutes even though it can be modified from the script. This time is set to a maximum of 60 minutes, this means that if the script has specified a bigger time, the system will apply a punctuality interval of 60 minutes.

The "Agent Callback," "Call in N number of minutes," "Call back tomorrow"-type call dispositions will respect the record list if this is found in the list of agent callback calls.

The "17-Off Call-back interval" and 18-Agent assigned is not active" system call dispositions will not increase the counter of contact attempts.

Notes on the punctuality interval

1 Q: When is a record marked for special treatment?

A: Every time the "Agent Callback"- call disposition type is run.

2 Q: Within this interval, the system calls back periodically every N number of minutes. Where is this value defined?

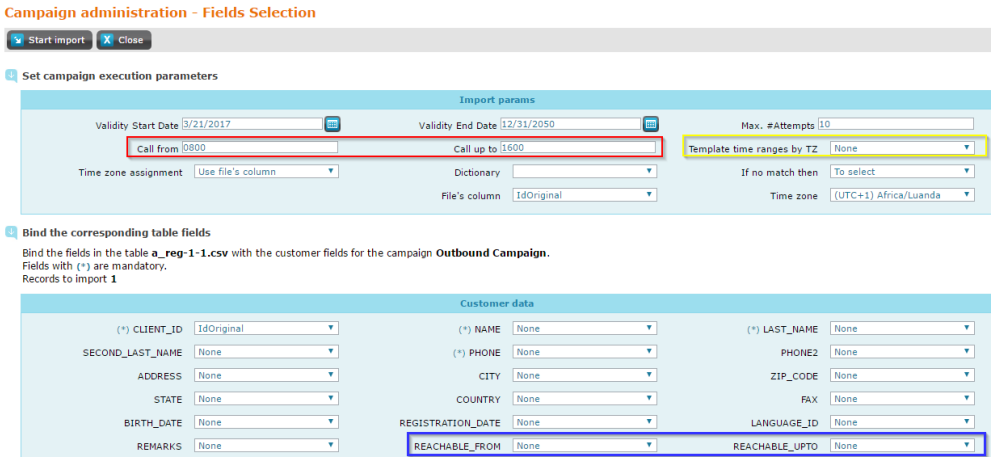
	A: A call disposition has an N parameter of “call in N number of minutes” The value is specified in a “Agent Callback”-type call disposition, i.e., the value is scheduled in the call disposition that makes the first callback. If this value equals 0, see question 8.
3	Q: How is this “punctuality interval” defined? A: By default, it is set to an hour maximum, from the hour assigned for the call-back. But if the script has gone from an INTERVAL_TIME VALUE lower than an hour, this second value will be taken.
4	Q: What happens when the record gets out of the punctuality interval? A: It is planned for the next day.
5	Q: What happens if within the “punctuality interval” the client is contacted, and a new call-back is requested? A: The parameters of this new call-back will overwrite the previous one.
6	Q: What happens if other types of call dispositions are run within the “punctuality interval”? A: The “No more calls,” “Pass to non-callback,” “Call tomorrow”-type call dispositions are not affected and are normally run.
7	Q: What happens if within the “punctuality interval,” the call goes out of the interval call_from/call_until? A: The system will try to call the next day at the same time in which the call was originally replanned. If for any reason, this time is out of the interval call_from/call_until, it will be readjusted so that it enters within this interval.
8	Q: How can I deactivate the special behavior of the punctuality interval? A: If the value of minutes specified in the “Agent Callback”-type call disposition equals 0, the system behaves in a standard manner and ignores the punctuality interval. In other words, in a ‘Call in N number of minutes’-type call disposition, the specified callback is applied in said call disposition.

6.14.2 LOCALIZATION RANGES

Omni+ keeps the information of a localization time slot or range for every client record in the tbCampaignSubjectIdentity table.

These intervals can be defined during the client import process in three different ways and can be apply to the most restrictive of the set (intersection):

- By relating the ACCESSIBLE_FROM and ACCESSIBLE_UNTIL fields with any other field of the client Data upload file.
- By establishing the upload parameters of Call from and Call until.
- Use the schedule template for TZ, where Time Zone defines these parameters.



The valid values are: 0000 ≤ From< To < 2400.

The list contact extraction procedure respects these intervals. If a callback attempts to assign a call time that is out of the interval, the procedure sp_AdjustAtRange is run and the following process is performed:

1. If tNextContact is lower than the start of the ACCESSIBLE_FROM…
    a. If the record is in the list of "Agent Callback," it goes to the start of the ACCESSIBLE_FROM interval.
    b. If it is found in other lists, it is adjusted so that it enters within the interval.
2. If tNextContact goes over the interval ACCESSIBLE_UNTIL call disposition, the algorithm depends on the campaign parameter value "daily plan," according to the following table.

DAILY PLAN	
AUTOMATIC	The record adjusts so that it enters within the interval the next day. The records coming from the "Agent Callback" list is an exception to this rule and, the call-back time is respected, if possible, going to the record the next day.
MANUAL	The record goes to SYSTEM-DEREGISTRATION
CALL FROM	It goes to the start of the ACCESSIBLE_FROM interval of the next day.

When a record must be adjusted so that it enters the interval, an algorithm distributing calls evenly is used and this avoids that the calls build up at the beginning or at the end of the interval.

6.14.3 AUTOMATIC TREATMENT OF NON-CLOSED MANAGEMENTS TASKS

If for any reason, a management task is not ended with the corresponding call disposition (example: the agent user disconnects abruptly or the application closes while a management task is being done), the management task will automatically end with a system call disposition (14- “Finalized by the system”) through the maintenance daemon.

6.15 SEGMENTS

The client record list of a campaign can be segmented in order to make its management easier. From this segmentation on, it will be possible to gradually control the campaign progress, pausing/activating segments of the lists, or indicating different relative priorities.

> For example, if the records are segmented by zip code, it will be possible to apply different priorities to the records in the list according to their geographic localization.

There are two types of segments: **static** and **dynamic**.

During the client record upload, a `segment_attribute` field is reported, from which the Manager will be able to define its belonging to a **static segment**. The records that are not explicitly assigned to any static segment will be assigned automatically to the static segment “default.”

> All the client records belong to one and only one static segment, either an explicit segment created in Manager or the segment by default.

Through the so-called **dynamic segments**, very sophisticated strategies can be defined to select and prioritize records. This functionality allows to define records subsets to which it is required to call, indicating priorities among them. The module accepts SQL Standard language queries (*Structured Query Language*), which allows to define arbitrary queries from the database considering any number of fields or criteria, including the possibility of filtering by tables with external business data.

> Examples: clients in between 18 and 25 years old, clients who have not been contacted in the past 48 hours, clients whose debt is higher than 10000.

The dynamic segments are dynamically assessed, and the result can be changing all the time. Therefore, at a specific moment, a client record can belong to zero, one or several dynamic segments.

A segment is defined by the following data:

PARAMETER	DESCRIPTION
Name	Segment identification.
Priority	{1...100} Segment priority. The most critical segment records will be delivered first (the one with less priority value).

Type	Static or dynamic.
Status	{active / paused / PA active / maximum quota / paused by mistake / paused by timeout}.
Weight	{1..100} For segments with the same priority, it establishes the weighted value for each segment in relation to those of its same priority.
Attribute	Only for static segments. Value of the characterizing attribute. This value will be chosen from the "available values" list.
Query	Only for dynamic segments. SQL expression. With the [verify query] button, the query will run for its verification without affecting real records.
Maximum quota	Maximum quota for the campaign. When this maximum quota is reached, the segment goes to the "stopped due to Maximum Quota" status.
Current quota	Shows the current quota meter.

AP Active Segment: the segment will only be active for the record Agent callback, and the remaining records, Non-callback and System callback, will be paused.

Paused due to error segment: the dynamic segment will be based in a SQL sentence that was a mistake. In order to avoid running a mistaken sentence indefinitely, the segment is automatically paused when a mistake is detected.

Paused due to timeout segment: in this case the underlying SQL sentence contains a query that takes too long and has caused a timeout.

6.15.1 HOW TO DEFINE A STATIC SEGMENT

During the upload process, make sure to report the `segment_attribute` field with the field that you can want to use for classifying campaign contacts in different segments. For example: upload a field containing the client country in `segment_attribute`.

After the import, define the required segments through the Manager campaign administration:

1- Administer the Manager campaign, press the [Segments] button
2- Create a new segment with [New].
3- Report the following parameters: Segment name, priority, type: static, Status: Active, Weighted value: 100.
4- Display the Attribute list-box and select the proper value. This field displays all the different values of the segment_attribute belonging to the campaign records.
5- Close and save.

The different segments must have different attribute values. Therefore, only those values that are not being used by other segments appear in the list of available values

The contacts not belonging to any specific segment will be considered a “default” segment.

6.15.2 HOW TO DEFINE A DYNAMIC segment

Define the required segments through the Manager campaign administration:

1- Administer the Manager campaign, press the [Segments] button.
2- Create a new segment with [New].
3- Report the following parameters: Segment Name, Priority, Type: dynamic, Status: Active, Weighted value: 100.
4- In the “query” parameter, type a SQL sentence expressing the required filter. We will be able to verify if the query is syntactically correct with the “Verify query” button.
5- Close and save.

Requirements for a SQL query to be valid in a dynamic segment	
1	The SQL query must return at least one “SUBJECTID” column containing the clients’ ids that make up the dynamic segment.
2	While the sentence can return other fields besides the “SUBJECTID,” this is not recommended since this can slow down the query performance. Thus, it is best to only select the SUBJECTID.
3	The sentence must run within the context of the OMNI+ DB, i.e., any table belonging to the DB can be accessed, including business tables that can have been added to the standard Omni+ DB.

The SQL sentence of a dynamic sentence can affect the database performance; therefore, it is necessary to optimize to the maximum.

Examples of queries for a dynamic sentence

```
-- call Mexico
select subjectid from clients where country like 'Mexico'



--call answering-machine


select subjectid from tbcampaignsubjectidentity where idlastending=19



--call no-answer
select subjectid from tbcampaignsubjectidentity where idlastending= 1


-- call telephones starting with 6
select subjectid from clients where telephone like '6%'


-- call CP = 27xxxx
select subjectid from clients where postal_code like '27%'


-- call restaurants, except between 10:00 and 14:59
select subjectid from clients where sCompany like 'restaurant%'
 and not (datepart(hour, getdate())>= 10
 and datepart(hour, getdate()) <= 14 )


-- call mobiles in the morning

select subjectid from clients where telephone like '6%'

 and datepart(hour, getdate()) >= 8

 and datepart(hour, getdate()) <= 14


--call landlines in the afternoon/evening

select subjectid from clients where telephone not like '6%'

 and datepart(hour, getdate()) > 14
```

Dynamic segments can be not disjoint.

It can occur that the same client can belong to two segments at the same time. For example, if we have a segment of clients younger than 30 years old and other segment of clients older than 25 years old, it is clear that both segments share clients. Omni+ determines to what segment a client belongs in real time, when it executes the SQL sentence related to the **highest prority segment**, or for segments of the same priority, proportionally allocating the records **based on their weight**. In case of equal priority and weighted value, the allocation is done in an aleatory manner. In any case, at the end, the client is assigned one of the segments to which he/she can belong.

Dynamic segments are additive, not subtractive.

If a record is found in one or more active segments, it can be treated.

> Even if a client record complies with the query condition of a dynamic segment that has been paused, this does not mean that it cannot be found also in another dynamic or static segment that is active.
>
> Remember that the segment by default contains all the clients that do not belong to **any other static segment**.

6.16 DYNAMIC BUSINESS ROUTER (DBR-SCRIPTS) SCRIPTS AND APPLICATIONS

Dynamic Business Router allows to define routing strategies in which the treatments given to multichannel calls and interactions are defined through a sequence of programmable steps that will generally be called DBR-Scripts.

These scripts can be edited visually with Developer.NET through a graphic interface that can be easily used.

The DBR-scripts help provide the proper treatment to the inbound calls, through IVR (Interactive Voice Response) type interactive treatments and speeches as well as help route them to the campaign waiting queue. During this treatment, information can be looked up in databases and external systems, with this the properties for an optimal routing based on business rules can be established.

Similar treatments can be performed for different channel interactions such as email or twitter, or different documents types.

The call center my use DBR-scripts to:

- Qualify and route the calls in the more appropriate campaign queue, giving priority and skills and data according to the business rules.
- Establish IVR (interactive voice response) type dialogs to give automatic or semiautomatic treatment. Give possibilities to use (ASR) and text-to-speech synthesis (TTS).
- Give dynamic treatments to the calls in waiting queue through speeches, music-on-hold and others.
- Analyze and treat multichannel interactions (email, twitter, documents, etc.).
- Integration with the predictive dialer, for example, to detect automatic answering machines and issue speeches.

When a DBR strategy with a script related to an inbound or outbound campaign call or a document interaction, the first step of the script will be automatically run.

The scripts automatically receive the interaction data. The data include in particular the call telephone number as well as other information pertaining to the contact.

6.16.1 HOW ARE DBR-SCRIPTS DEVELOPED?

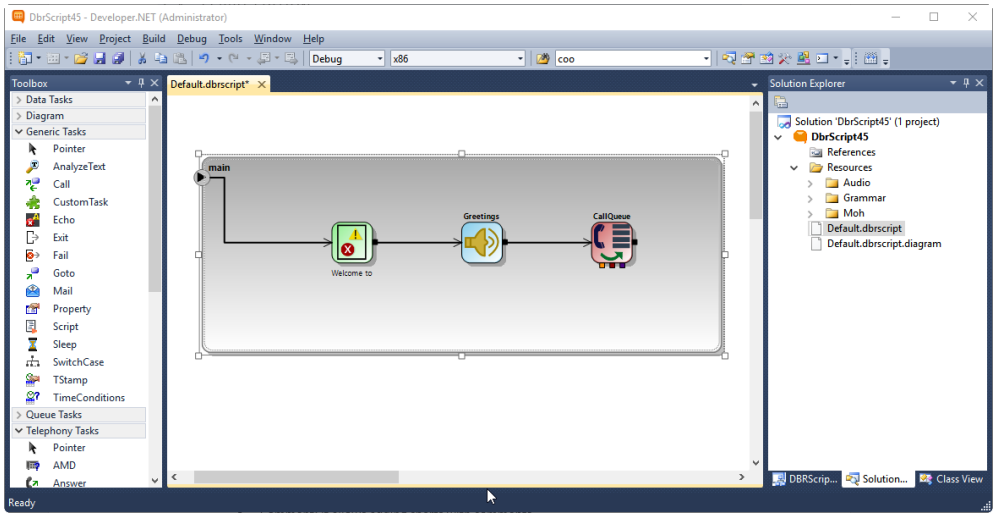
The DBR scripts are built up with the Developer.NET tool, which constitutes a development environment specially optimized for the development of the call centers call flow.

This environment has a toolbox with elements that can be dragged to the design surface:

- Generic Tasks: Run flow control, analysis and text analysis, emails sent, schedules and calendars, access to internal and external data, access to bookstores .NET, etc.
- Queue management tasks: call queue management tasks and campaign interactions, access to queue data, etc.
- Telephony Tasks: Call control, audio messages emission, music on hold, tones reception, DTMF, etc.

Other important features of Developer.NET are:

- It is based on Microsoft Visual Studio 2010.
- It is a projects and solutions explorer.
- Visual development environment. Allows to define the step sequence in a visual manner, dragging and dropping elements such as blocks and tasks.
- Script display integrated with Omni+.
- Integration with source code managers such as Microsoft Visual SourceSafe.
- Access to simplified data.



For complete information on DBR scripts development environment, see the "Omni+ Developer.NET Reference Manual."

6.16.2 HOW TO DEVELOP A NEW DBR-SCRIPT

If you wish to create a new script from a previous script project, copy the complete starting script directory to a new location.

1. Locate the new project file .dbrproj and re-name it so that you have a unique script name. E.g.: MyQueueScript. dbrproj.
2. Open Developer.NET by double clicking on the .dbrproj file.
3. From the solutions explorer, select the main mode corresponding to the project and access its properties by clicking on the mouse right button or with ALT>+<INTRO>.
4. Make sure that "Display type"=developerService and edit the "Display through the web service | Web Service" property so that it points to the Omni+ server. E.g.: http://192.168.0.101/Omni+/DeveloperService/DeveloperService.svc.
5. Press "Accept" to close the property pages.
6. Select the main script file named Default.dbrscript and open it by double-clicking.
7. Edit the script, adding, modifying or removing tasks and blocks from the tool chart. You can edit the properties of each element by pressing See the "Developer.NET Reference Manual."
8. Save changes made to the file with the "File | Save all" menu option.
9. Once you have finished building the script, publish it to the Omni+ server with the "Generate | Generate <script-name>" menu option. E.g.: "Generate MyQueueScript."

When a Developer.NET script is published to the server, you are required to indicate an Omni+ administrator password and username, for example: NCADMIN. If the script already exists, a confirmation to overwrite it will be requested.

10. Make sure that the results window is visible with the command "See | Results" from the menu and verify that it has been properly generated.

Now we can relate the script to one or more strategies.

11. Start Manager and identify yourself as an administrator.
12. Access "Administration | DBR Scripts" and verify the new script has been automatically recorded on the list. For example: "MyQueueScript."
13. Set up the strategy with "Administration | Campaigns | See Strategies," select the strategy and select the droop down parameter "routing"=DBR Script.
14. In the routing parameter, Script DBR, select the script that you have just published. For example: "MyQueueScript."
15. When the route-point corresponding to the strategy receives a call or interaction, the script will be downloaded and run from the "main" block.

See "Omni+ Developer.NET Reference Manual."

6.17 SKILLS

Call routing functionality based on skills is only available in campaigns managed by Dynamic Business Routing (DBR).

6.17.1 WHAT IS A SKILL?

A skill is an area of knowledge. Omni+ allows to define skills in order to define these areas of knowledge. For example, in a Technical Assistance Service, let's imagine that we want to represent the level of knowledge that our agents have in three different operating systems:

- Windows
- OS/X
- Linux

We need to create a skill for each of these operating systems.

For each user, we can choose one or various skills and specify the level of knowledge the user has on that Skill. This degree of knowledge or level of skill is specified with a number from 1 to 100, being 100 the maximum level. For example, an agent A can have a 100 level in Windows, 40 in OS/X and have no skill in Linux.

A campaign call can have related skills and a minimum level of skill required. If a call has related skills, it means that the call has to be taken by an agent having the minimum level of skills specified in the call.

Following with the previous example, if a call requires a level of skill Windows 80, it can be taken by agent A since he/she has Windows knowledge with a level >= 80.

6.17.2 OPTIONAL SKILLS

A skill whose minimum level required is zero is considered an optional skill.

In this case, it is considered that all agents comply with the requirements of this optional skill, but during the selection of a free agent, those agents that really have such skill will be prioritize.

It is possible to set up strategies requiring optional skills. First, the call will try to be delivered to an agent having the optional skill. In case, there is no agent having this optional skill, then that skill will be ignored, and the call will be delivered to another agent, even if the agent does not have the skill.

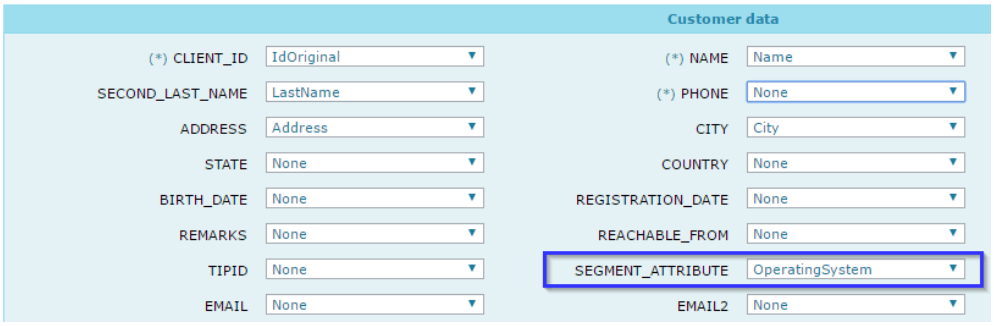
6.18 SKILLS ASSIGNMENTS (OUTBOUND SKILLS)

The functionality of Skills assignments allows to assign records for an outbound dial-up to an agent or to a group of agents based on their skills.

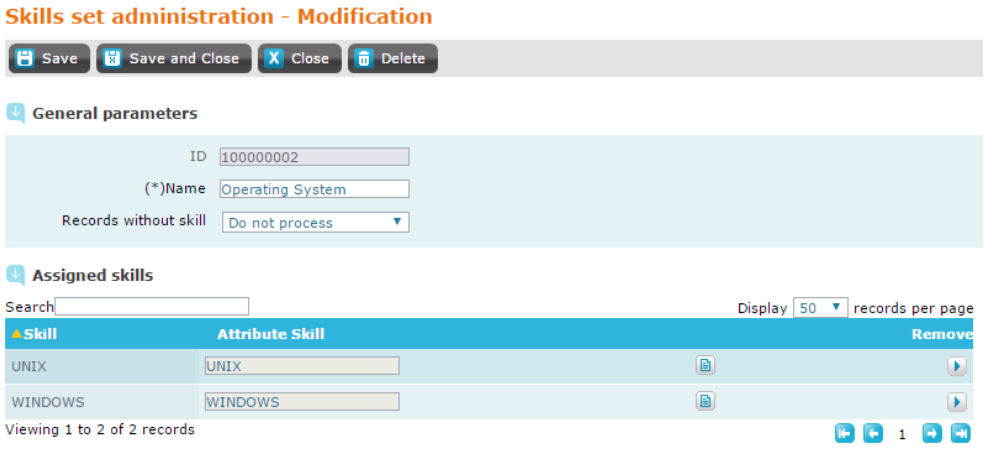
The use of outbound skills will not affect the records Assigned to the agent, i.e., if a record is assigned to an agent, with or without the record skill, this record will be given to the agent once the callback sets and priority conditions are met.

In order to perform the Skills assignment, we must follow these steps:

1. When importing the records, assign the field indicating the skill to be used through the Skill_Attribute. In the example that we are going to use, in the import file, there is a field called Operating_System and the potential values are Windows, OS/X and Linux.

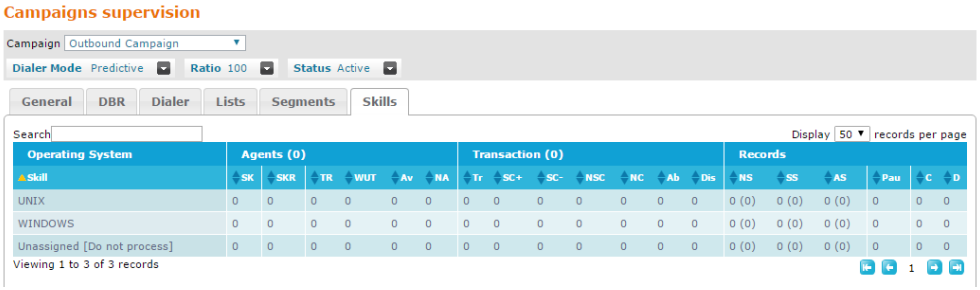


2. We will create two Skills, one for LINUX and another one for WINDOWS.
3. We will assign these Skills to the agents with the desired points. An agent can have the skill for one, two or any operating system. At the time of selecting records for an agent, we will try to obtain records for the skill with the highest grade.
4. From the campaign administration, create a skills assignment, this assignment will be saved with a name, in our case, INFORMATION TECHNOLOGY and will be used in as many campaigns as desired.
   In this assignment, the relationship between the content text of the Attribute skill coming from the upload file and the agent skill required to treat the record, in this example, when the record has a “Linux” text in the OPERATING_SYSTEM field, it will only be treated by agents having the LINUX Skill.
   From the same screen, the way the records not having assigned skills will be treated is set up. The possibilities are:
   - No treatment: Records not having any relation with the Skill will not be treated.
   - Treat without skill Records not having any relation with the Skill can be managed by any agent connected to the company.
   - Treat with a skill: Records not having any relation with the Skill can be managed by those who have the selected skill.



5. In the campaign administration, select the Skill assignment desired.

In Supervision, there is a panel where the number of agents connected to Skill is indicated, what is the critical Skill for the RSK agents and the state and records available in every defined Skill.



6.19 TIME ZONES

6.19.1 WHAT DOES TIME ZONE MEAN?

This term identifies a geographic region in which the time is even for legal, commercial and social effects. An example of Time Zone is “Central European Standard Time”; this indicates the following regions have the same time:

- Europe/Sarajevo
- Europe/Skopje
- Europe/Warsaw
- Europe/Zagreb

6.19.2 WHAT ARE TIME ZONES USEFUL FOR?

In Omni+, they are used to fit the type of call to the client time/schedule according to their location and the call parameters. The Call Center time and the client time can be different. If the client does not have an assigned time zone, it means that it is located at the same time zone of the Call Center.

6.19.3 HOW ARE TIME ZONES ASSIGNED?

In order to assign the time zones to the client records, in Manager, in the import configuration screen, there are the following options:

6.19.3.1 IDENTICAL TIME ZONES FOR ALL THE RECORDS

When choosing this option, all the upload records will have a common Time Zone. The upload parameters are chosen as it is shown in the following image.

The referred parameters are:

- Time Zone Assignments = Choose Time Zone

- Time Zone = (UTC+0) Europe/London

In this case, it is said that clients are in the Europe/London time zone, that matches the UTC (Universal Time Coordinated, in English).

6.19.3.2 ASSIGN TIME ZONE BASED ON THE DATA TO BE IMPORTED

When choosing this option, Omni+ will do a smart search to identify the client Time Zone. The search will be done based on the import file columns and will be supported by auxiliary dictionaries set up in the database for this purpose. For example, the record Time Zone can be identified in the zip code, the telephone number, country telephone prefix, etc. To assign Time Zones through search, in the import configuration screen, the upload parameters are chosen as shown in the image below:

The referred parameters are:

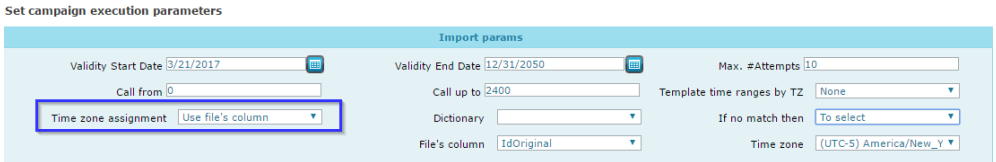
- Time Zone Assignment = **Use file column**
- Dictionary = **DialCode**
- File Column = **Telephone**
- If there is no match = **Without time zone**

This way it is indicated that for each record, the search will be done by using the data available in the Telephone column of the import file. In case that the Time Zone is not found, the record will not assign any (this is indicated with the **There is no match** parameter).

When the Time Zone search is not successful, Omni+ can be told what to do with the client records. The parameter options are:

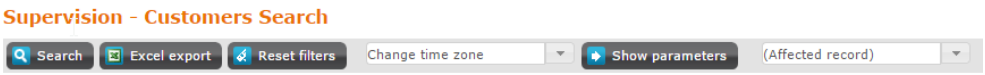
- Select: every record will have a Time Zone by default.
- Discard: the records will not be imported.
- Without time zone: the records will not have time zone.

In the image below, option 1 selection is shown: Assign Time Zone



6.19.3.3 ASSIGN TIME ZONE FROM CUSTOMERS SUPERVISION

After selecting (search) a client group, it is possible to assign the time zone to every element in the set. For this, in the search screen, choose the Change time zone action as shown in the following image:

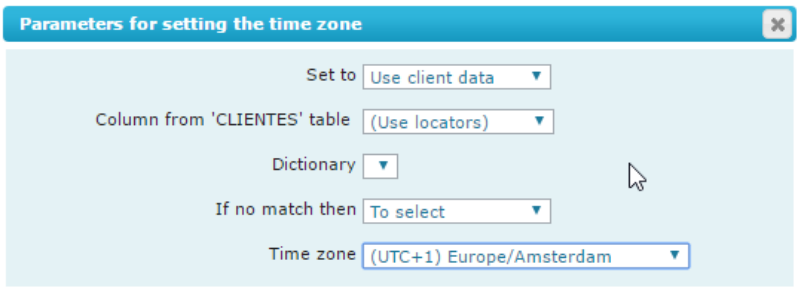


When pressing the **See parameters** button, a dialog window will open, and you will be able to set up the assign time zones options in the records.

The options are:

- Without time zone: the time zone will be removed from the records.
- Select: the records will be assigned the selected time zone
- Use client data: Omni+ will make a smart time zone assignment, based on one of the fields selected and using the selected dictionary.

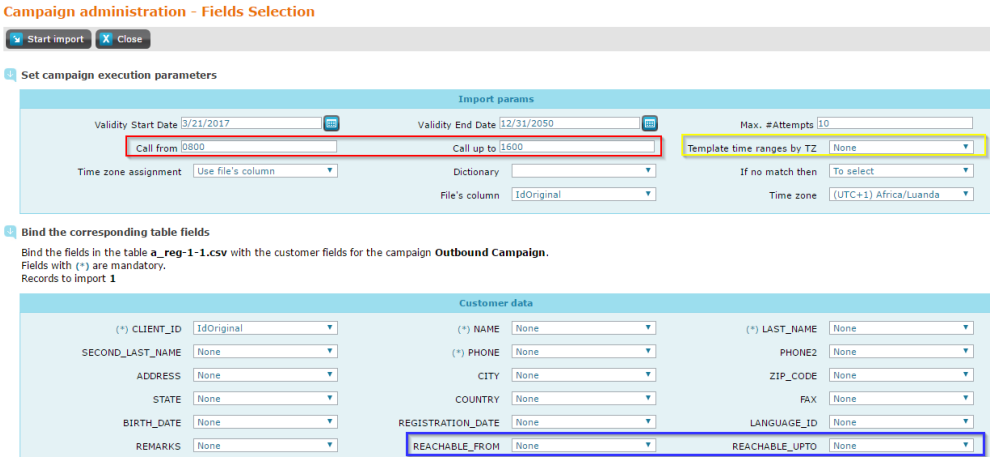
The image below displays the configuration to make a time zone assignment per search:



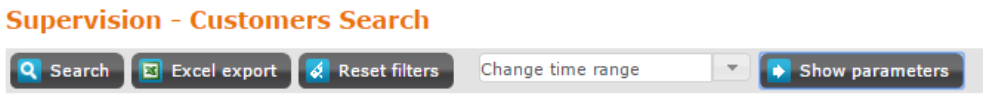
The screen also displays how Omni+ can be told to assign a permanent time zone to all the records for which no time zone is found when searching.

6.19.4 TIME ZONE LOCALIZATION RANGE CHANGES

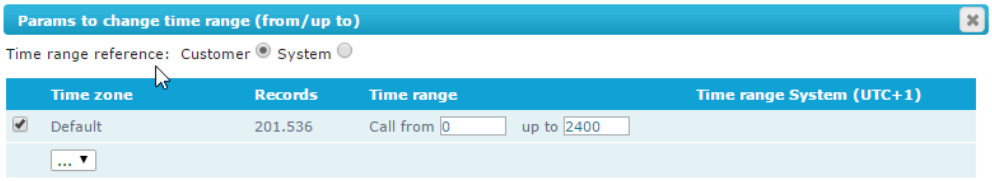
A localization range is explained in chapter 6.13.2. Remember that these can be applied from clients import:



In order to modify the localization range per time zone, from client supervision, start the search of the clients to be affected and then, choose the **Change time** option as it is shown in the image below:



When pressing the **See parameters** button, a dialog box will open and you will be able to set up the client localization ranges according to your criteria. A configuration example is shown in the following image:



When running the operation, Omni+ will modify the clients' records selected as follows:

1. Those that have been assigned the Europe/London time zone, will have from now the 10:00 – 19:00 localization range.
2. Those that have been assigned the Europe/Vatican time zone, will have from now the 7:00 – 15:00 localization range.
3. The remaining records will have from now the localization range 9:00 - 18:00.

6.20 STRATEGIES

The strategies allow to define to what campaign and with what parameters the call in a specific route point will be routed.

There can be four types of strategies:

1. Static DBR, i.e., DBR routing parameters are establish beforehand.
2. Dynamic DBR, in the DBR routing parameters are established in a dynamic manner through a web service.
3. DBR Script, in which the DBR routing parameters are established in a dynamic manner through a DBR script.
4. DNIS or Switch-based routing in which the routing is established by its own telephone private branch exchange.

In the DBR-type strategies, it is specified if you wish to automatically disconnect the client call or not. This allows to implement call treatment strategies before disconnecting the call (for example, refuse the call without disconnecting it to avoid that the client pays the cost of establishing the call). By default, the call is automatically disconnected by the Omni+ DBR module. The call can be explicitly disconnected in a DBR Script through the "Answer" task. If the call is routed by an agent, the call is automatically answered.

6.20.1 STATIC DBR-TYPE STRATEGIES

A static DBR-static-type strategy is defined by the following parameters:

- DN.
- Description.

- Campaign.
- Agent (optional).
- Call priority.
- Call handicap.
- Disconnect the call.
- Forward extension in case of closed queue.
- Forward extension in case of saturated queue.
- Call skills (see section above).

A static DBR-type strategy is linked to a route point or to a DNIS, according to what has been set-up in the Omni+ DBR itself.

It is also allowed to specify an extension or queue to which the calls in case of closed queue and saturated queue will be forwarded.

Additional, for the dynamic strategies, the call can be associated with a set of key/value pairs that will be associated with an inbound call.

For other channels, different from the telephone ones, the “Forward extension” fields do not need to be specified.

6.20.2 DYNAMIC DBR-TYPE STRATEGIES

A DBR dynamic-type strategy is defined by the following parameters:

- DN.
- Description.
- WebService URL.
- Disconnect the call.
- Forward extension in case of closed queue.
- Forward extension in case of saturated queue.

A dynamic DBR-type strategy is linked to a URL corresponding to an external WebService. For every interaction that must be treated, the server will call this web-service, that can return the routing destiny: Campaign, Agent (optional), Call priority, Call handicap, Call skills.

This way, the interactions will be routed according to the specific business rules implemented by the web service.

6.20.3 DBR-TYPE STRATEGIES

A DBR-type strategy is defined by the following parameters:

- DN.
- Description.
- DBR script
- Campaign (optional).

- Agent (optional).
- Call priority (optional).
- Call handicap (optional).
- Disconnect the call.

A DBR-type strategy is linked to a script defining the sequence of logical steps and treatments to do. If the optional fields are reported, this information will be available for the script in the properties: strategy.campaignid/ agentid/ priority/ handicap respectively.

6.20.4 DNIS-TYPE STRATEGIES

A DNIS-type strategy is defined by the following parameters:

- DN
- Description
- Campaign

It is also possible to allocate various DNIS strategies for the same campaign.

Wildcards '?' and '* can be also used to allocate DN ranges for the same strategy.

6.21 DBR CONNECTORS

The DBR connectors are software modules that enable the DBR to route specific interaction types according to the corresponding DBR strategy.

Some DBR connectors allow the telephone calls to be routed by the Omni+ DBR engine. For example, the DBR connector for Cisco CM/UCM.

Other specialized DBR connectors in the integration with non-interactive channels. For example, the DBR connector for Pop3.

6.22 CAMPAIGN AND SEGMENT QUOTA

It is possible to define quota limits in such a way that when the limit is reached, the segment or the campaign will be automatically stopped.

The quota meter is increased in the application or script when a management task is finalized. In the call to the iAgent function to finalize the management task, the quota increase representing a specific call disposition is clearly stated.

The real quota and the limits are available for consultation to everyone at any time from the Omni+ administration application, Manager.

6.23 FOLLOWING MANAGEMENT MODE

Omni+ allows a user to transition to available for the following management in two different modes adapting itself to the best operation per service:

FOLLOWING MANAGEMENT MODE	DESCRIPTION
AGENT	It is the agent who decides when to request the following management transitioning into AVAILABLE.
SYSTEM	The system starts the following management automatically without the user explicitly requesting it. If previously the user has requested to take a break, this will be granted.

6.24 CALL-BLENDING

Omni+ supports universal campaigns in which the users can receive and issue contacts. This type of operation is called “call-blending.”

A supervisor or administrator can indicate the time in seconds in ACD available state to allow incoming calls after management.

If 0 seconds is indicated, call receiving will be avoided.

CALL-BLENDING TIME	DESCRIPTION
0 s.	When transitioning to available, an ACD available status is avoided, thus no calls are received.
>0 s.	A time slot is generated after every transition to available in which the application can receive ACD calls.

Note: Inbound interactions can have priority on the outbound interactions.

6.25 WHAT IS THE SERVICE LEVEL?

In general, "Service level" is an indicator that reports on the speed at which inbound interactions are being served and, is specified as the percentage of calls served before a specified maximum waiting time (service objective) per the total number of calls.

Example: 95% of the calls have been served in less than 30 seconds.

Normally contact-centers establish minimum of service level agreements (Service Level Agreement, SLA).

Example: to take a minimum of 80% of the calls in less than 30 seconds

The service level indicator used in Omni+ follows the following formula:

$$Service\ level(T) = \frac{\#served\ (<T)}{\#served\_agent + abandoned(>T) + \#in\_queue(>T)}$$

- Service objective (T): Maximum time to serve a call, administered in the campaign.
- #served(<T): Calls served by an agent with a waiting time in queue of less than T number of seconds
- #served_agent: Total number of calls served by an agent.
- Abandoned(>T): interactions that have abandoned the waiting queue after waiting for more than T seconds
- #in_queue(>T): interactions in waiting queue, which waiting time has gone over T seconds and, therefore, they will be definitely served out of the objective service

Example: In a campaign whose service objective is of 30 seconds, the agents have served 520 calls, of which 490 have a waiting time of less than 30 seconds. 35 callers have disconnected after waiting in queue for more than 30 seconds. At this time, there are 15 interaction in waiting queue and their waiting time has gone over 30 seconds.

The service level for T=30s will be of:

$$Service\ level(T) = \frac{490}{520 + 35 + 15} = 85{,}9\%$$

6.26 WHAT IS THE RECORD CACHE?

Omni+ keeps a cache with the following records to be treated in outbound campaigns.

This cache is automatically managed by the server even though the administrator can modify its behavior. The general operation of this cache is as follows:

1. First, we obtain a record number due to the records HWM for each agent connected to the system.
2. As the records are being processed, the cache gets emptied.
3. When the cache record number decreases to ca certain level (LWM per agent), a new cache refresh is started to go back to obtain records HWM for each agent connected to the system.
4. To make sure there are no incorrect records in the cache, it must be refreshed at least every tmMaxRefreshTm.1

Cache parameters are as follows:

PARAMETER	REQ	DESCRIPTION
Cache size (HVM)	✓	Number of calls **per each agent**[2] that the dealer keeps in the local cache. As calls are made, they are removed from the cache. When its size falls below the specified value in "minimum cache size," the list is refreshed with new calls taken from the data base.
Minimum cache size (LWM)	✓	Number of calls below which the dialer refreshes the calls to be made, until the number of calls specified in "cache size" is reached.

6.27 CALL RECORDINGS

Omni+ is compatible with 3 types of recording:

- Omni+: is independent from the telephone private branch exchange mark and model so it should work with any kind of telephone private branch exchange. The audio should be extracted from the headphones and pass it to the sound card in the agent's PC. An adapter can be used.
- Nice: with this integration, Omni+ can control the start/stop of the recordings Nice, as well as tagging the recordings from the scripts. *The recording software Nice must be provided by the manufacturer.*
- Asterisk: with this integration Omni+, can control the start/stop of the recordings if Asterisk is used as a telephone private branch exchange.
    - In the case of Asterisk and the use of integrated Softphone, there are two possibilities: the softphone can record in local (in the agent's PC) or do not record from the softphone and make the recording from Asterisk (Server).

1The standard value of this parameter is 1 minute. It can be modified by accessing the server configuration.

2 The system keeps a unique global cache of the system with an equal number of agents x cache size

This configuration is determined by the post administration and allows to remove the load from the Asterisk Server process or decrease the band width required in between Agent and Server.

The Omni+ recording module allows to record calls in an audio file and, additionally, relate the recording to the contact made, which allows to search recordings afterwards based on the business data. It is an economical option to make call recordings facing other commercial solutions.

For the recording through iAgent, the audio must be extracted from the headphones and pass it through the sound card of the agent's PC.

In order to extract the audio from the headphone, one of the several accessories or adapters available in the market must be used, for example:

Retell PC to telephone play and record connector part number 157

GNNetcom danaswitch recorder (1600-719R GN Danaswitch)

Once the audio is extracted from the sound card, iagent converts it to an .mp3 format and sends the files to the "Call Recording Daemon" server, which are stored in the server.

The recording can be set up in the following modes:

- No recording: any contact established during the campaign is recorded.
- Automatic: all contacts established during the campaign are recorded.
- Manual: the agent can start and stop the recording at any time.
- Integration: the agent's script controls what calls and at what time the recording is made. This allows to record only the most interesting part of the call.

From Manager, we will be able to register the recorders for Omni+ and link them to the desired workstations.

Several Manager screens allow to listen to the recordings, for example the Call disposition reports or the screens with the transaction details.

The reproduction of the MP3/WAV recording requires Windows Media Player or other compatible platers are installed in the Manager user PC.

6.28 ADMINISTRATOR'S MESSAGES

An administrator user can keep a list of messages that are delivered to the Call Center agents. These messages are visualized sequentially in the "ticker" zone of the agent's application.

Messages can be filtered through service or be sent individually.

6.29 REPORTS

The Omni+ server stores historical records of the call center activity allowing to obtain reports later.

An automatic Task Daemon process pours the records daily into tables with historical data in order to ease their consultation.

> If too many records have been stored, the running of complex reports on these tables can decrease the database performance. Therefore, it is very important to determine the dimension of the server where these tables are located as well as to limit its growth.

The Manager application generates several reports and statistics of operating progress control. All call, call dispositions, groups of call dispositions, works, clients, and incentives data is reachable through the reports and statistics generated by Omni+ to make the center's supervision easier.

The reports are complemented with graphics from different types that will help you obtain a much clearer vision of your call center Omni+. It is possible to change the graphic type in a dynamic way during the report presentation.

The architecture of the report module can also add new reports.

Customized reports can also be extracted by using reporting commercial tools.

6.30 INCENTIVE MODULE

Omni+ allows to define incentives and objectives for each agent in every campaign. It is a tool that increases motivation and allows to control progress and performance.

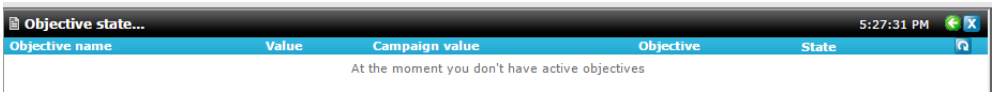
The incentive module allows to define "variables," set objectives on these variables and establish some incentives based on attaining those objectives. The incentive is a numeric value that can be monetary o translatable to any alternate reward system. A variable has also a temporary aspect associated to it, which can be DAILY, MONTHLY or YEARLY. Each of these VARIABLES will be related to a specific CAMPAIGN in Omni+.

When a module detects that an agent has attained one of the objectives, it generates a text message defined by the supervisor for each VARIABLE. This message is sent to the agent that has obtained the objective through "Ticker." This message is shown during several minutes specified in the "Expiry date" field.

The system also calculates a TOP_N for each VARIABLE automatically. This TOP_N is a list of the N agents having a higher punctuation for this variable.

The number N of records making up the TOP_N can be set up allowing it to be TOP_10 or TOP_20 as an example.

The agent can look up the level of attaining his/her objectives from the iAgent application:



From the Manager screen, a list of objectives and primes of all the agents can be obtained for each of the variables.

7 MANAGER

Manager is the Omni+ module allowing to administer and manager a platform. Thus, for example, a supervisor / administrator can supervise the way the campaigns and services work from any place in or out of the organization. The same way, it is possible to see the statistics in real time or modify the service parameters from the same application.

Manager keeps and controls different user access levels to the platform. This allows the necessary flexibility and efficiency to perform changes and Omni+s in big call centers. Through this administration application, it is possible to have information in real time on the services and the campaigns progress. From the same application, several functions can be performed:

- Administration of the services / campaigns status
- Administration of the center users
- Administration of the communication channels
- Statistics extraction
- Etc.

The users are organized in different roles, each of them with its own specific features: Agent, Administrator, Supervisor and Commercial.

USER TYPE	DESCRIPTION
Agent	Run campaigns and services, managing the contacts with the clients. Do not have access to Manager.
Administrators	Set up the Omni+ platform and perform data maintenance tasks and configurations, including the user configuration creation / modification, workstations, services, campaigns, applications, records contacts upload, deleting historical data. Can access the reports through Omni+/Manager.
Supervisors	Supervise the center activity from the real-time data and can act dynamically on certain parameters such as dial-up mode, priorities or segments. Can access the reports through Omni+/Manager
Commercial	Can access the reports through Omni+/Manager

7.1 HOW TO CONNECT TO MANAGER

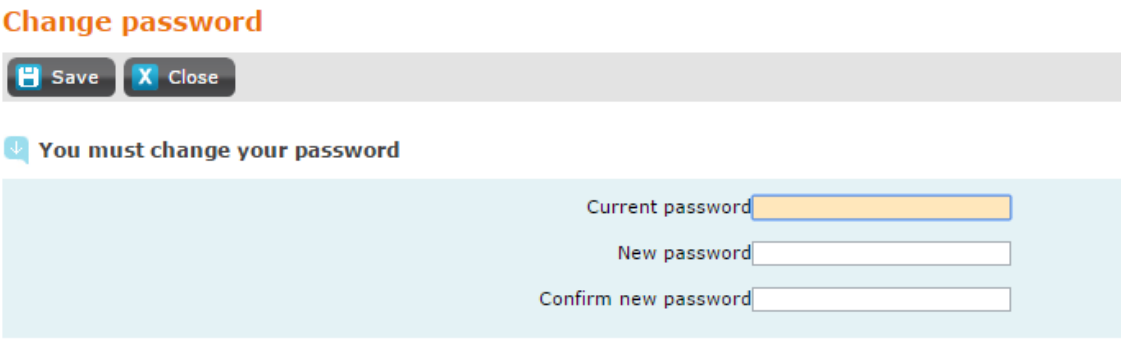
In order to access Manager, run your browser bar and enter the URL corresponding to the server where the Omni+/Manager was installed. E.g.: http://Omni+server/manager.

Start-up connection screen

Enter your username and password (administrator, supervisor or commercial) and press [connect].

By default, the administrator username/password is: NCADMIN/NCADMIN

It can occur that the Administrator can have requested to change the password in the following start-up session, or it can have expired. In any of these cases, a dialog box will be displayed to change the current password.



Once the user has identified him or herself in the system, the Welcome screen is displayed.

The first row displays the user that has started session, the user type, the Manager version, the current date and the following buttons to perform the actions:

BUTTON	ACTION
	It allows to modify the access password for the current user.
	Shows the product information screen.
	It ends the session with Manager

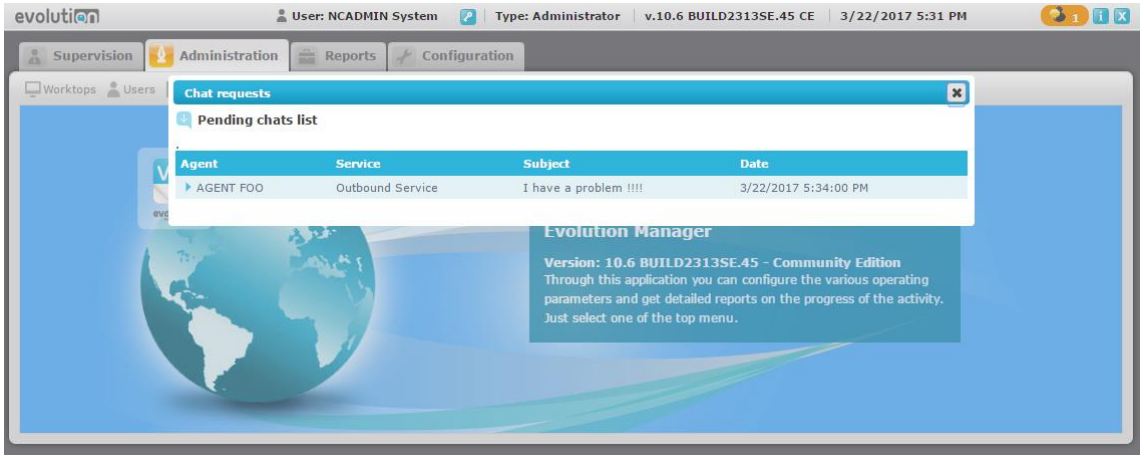
It displays the menu in the top area and its visible options depend on the access level of the identified user. The complete menu displays the following main options:

- Supervision: (Available in the supervisor and administrator access levels). It displays the current services and campaigns and obtains the client and call disposition information of the current date in real time.
- Administration: (Only available in the *administrator* access level). It allows to set up and administer the system.
- Reports: (Available in all the access levels). It allows to look up historical data on: calls, agents work, clients and business call disposition (contacts results).
- Configuration: It displays different system configuration parameters.

7.2 GENERAL FEATURES

7.2.1 INTERNAL CHAT WITH AGENTS

Omni+ allows the agents to ask for a chat request to the supervisors of the service in which they are working. Once the request is made, all the supervisors of the service connected to Manager will be shown a pending chat alert on the top right.



The list of pending chat requests appears when clicking on the alert. If the supervisor wants to stat chatting, he/she will only have to press on the name of the requesting agent to start the internal chat with the agent.

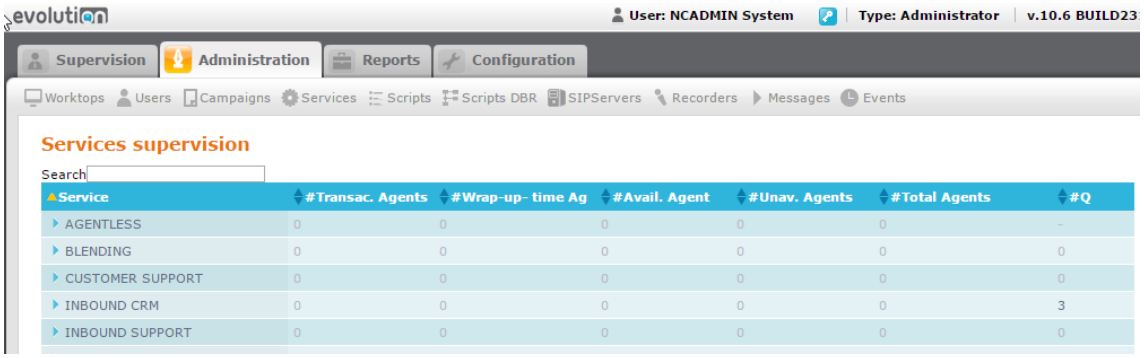
A supervisor can also start a chat session with an agent from the agents' supervision section in Manager.

7.3 SUPERVISION MODULE

The supervision module allows to supervise Services, Campaigns, Agents and clients.

7.3.1 SERVICE SUPERVISION

It displays a list of the services with a summary of the most important data.



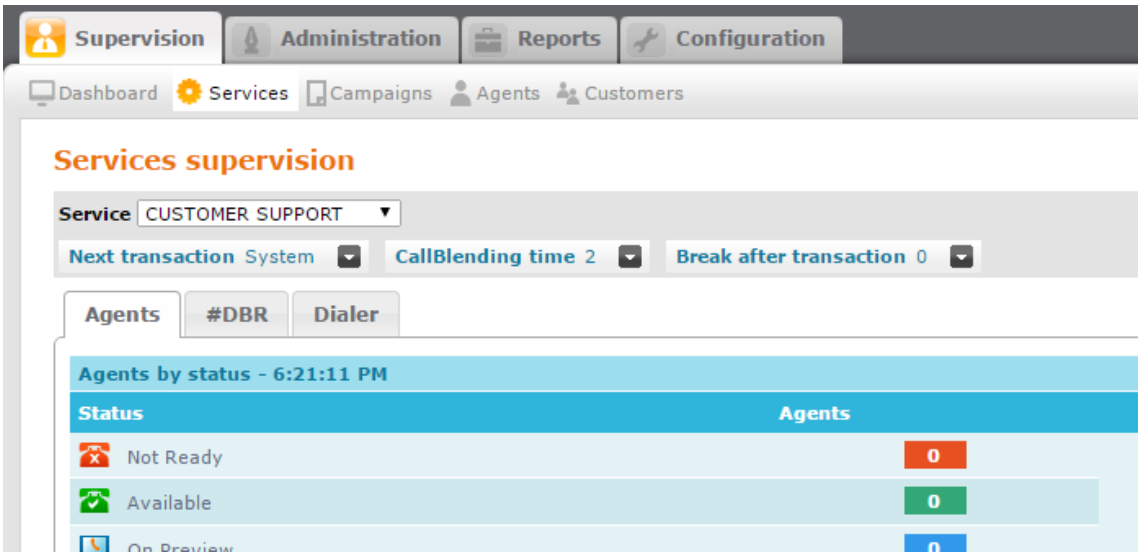
ATTRIBUTE	VALUE
Service	Name of the service with a link that takes us to its supervision.
#Ag.Management	Number of agents in management.
#Ag.AdminT	Number of agents in management tasks time. These agents are included within the management agents count.
#Ag.Avail.	Number of agents in the available status.
#Ag.Non Avail.	Number of agents in the non-available status or in a call and without transaction.
#Ag.Total	Total number of agents, the link takes us to the supervision of agents within this service.
#Q	Addition of the number of elements in the campaign queues that make up the service.

7.3.2 SUPERVISING A SERVICE

This option displays information at the service level as a group of campaigns.

The screen organized in two areas:

- Navigation bar that allows choosing the service to be supervised and to run actions on it: Following management, CallBlending time, and Pause after management.
- Data area: it contains information on the service organized under the tabs Agents, DBR and Dialer.



The content blocks of the tabs are:

- Agents by status: displays the distribution of the service agents according to their state.
- Workstations: detailed list of the active agents in the service (Tabs of Agents).
- Campaigns: detail of activity of each of the campaigns that make up the service.
- DBR calls waiting queue: graphic showing the status of the queues and service campaigns (DBR tabs).
- Dialer status: graphics showing the dialer calls made or the percentage of annoying calls for each service campaign (Dialer tab).

7.3.2.1 AGENTS BY STATUS

It displays the service agents' allocation according to their status:

- Available
- Busy
- Taking a call
- Taking a campaign call
- With a call waiting

7.3.2.2 WORKSTATIONS

Detailed list of agents active in the service:

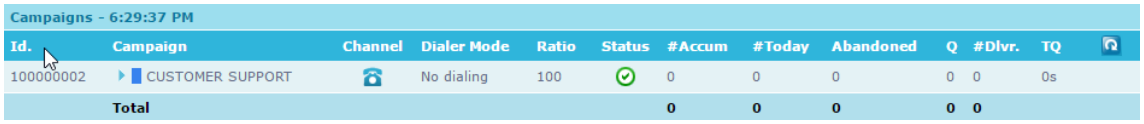
- Workstation
- Status
- Reason

- Agent

7.3.2.3 CAMPAIGNS

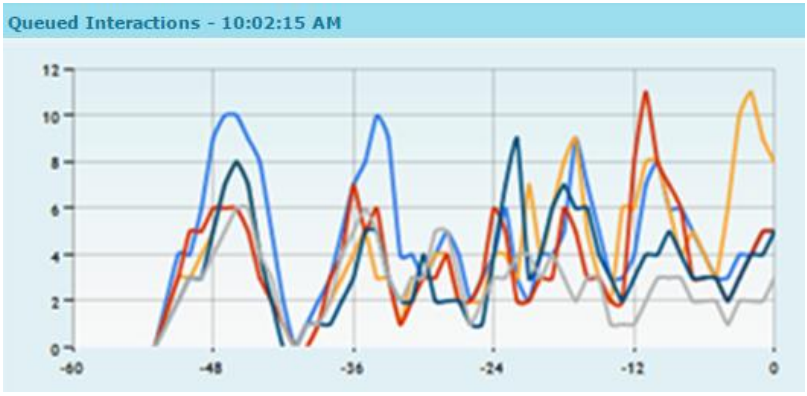
At the bottom of the services supervision view, you can see the list of campaigns related to the service with the following data:

- Campaign ID
- Campaign name
- Main channel
- Dial-up mode
- Weight
- Campaign status
- Accrued call dispositions
- Call dispositions today
- Abandoned today
- Number of elements in queue
- Number of elements in queue delivered to an agent
- Maximum time of waiting queue



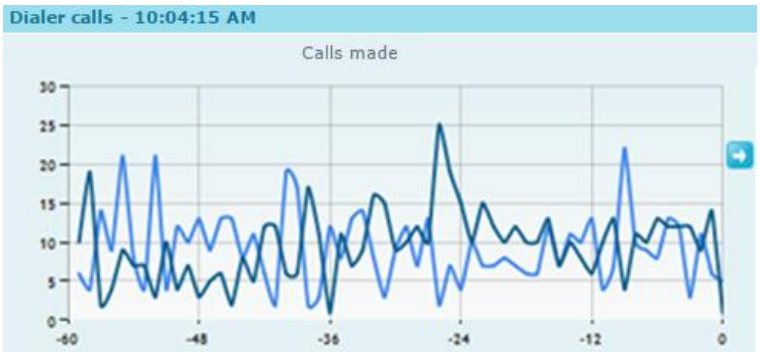
7.3.2.4 CALLS IN QUEUE

Graphic showing the historical status of the calls in queue for the service campaigns during the last sixty minutes.



7.3.2.5 DIALER CALLS

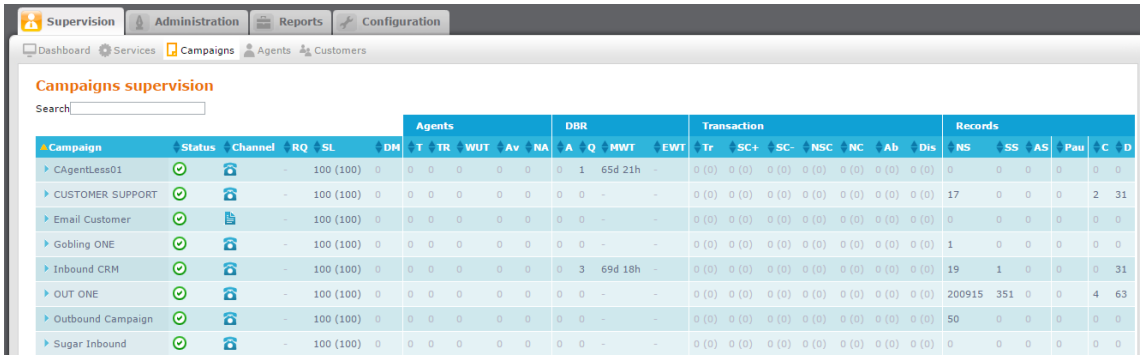
Graphics reflecting the dialer status. Two graphics that can be selected are shown through the side arrows. The graphic “Calls made” displays the number of dialer calls made for the service campaigns during the last sixty minutes. The graphic “Percentage of abandoned calls” displays the percentage of abandoned calls made for the service campaigns during the last sixty minutes.



7.3.3 CAMPAIGN SUPERVISION

When this screen is accessed, a summary of the most important campaign data is shown.

There are two alert levels, when we reach a critical value, we will see the data in orange and once we reach it or we overcome it, we will see the data in red.



ATTRIBUTE	VALUE
Campaign	Name of the campaign with a link that takes us to its supervision.
(Channel)	Channel set up in the campaign: None / Telephone.
(Status)	Campaign status: Active / Paused by maximum quota / Out of the calendar / Inactive.
RQ	**R**emaining **q**uota, difference from the real quota with the established maximum quota in the campaign. Alert to reach the maximum quota.
SL	(**S**ervice **L**evel) campaign service level. Of the current day and in parentheses the ones within the last 60 minutes. The alert is activated comparing its value with the campaign SLA.
Dl.	Number of ongoing **d**ialers.

Agents Section

When interpreting the values, we need to consider that the agents do not log into a campaign but to a service that can contain several campaigns. When an agent is logged into a service, we will see him/her counted in every campaign making up the service and when an agent is in management time in a campaign, the agent will not be available for the rest of the service campaigns.

ATTRIBUTE	VALUE
T	Total number of agents participating in the campaign.
M	Number of agents in Management.
MT	Number of agents in management tasks time. These agents are included within the management agents count.
A	Agents in Available status.
NA	Agents in **N**on-**A**vailable status for the campaign. In parentheses, the Non-Available ones are shown for this campaign because they are working in another campaign.

Queue Section

ATTRIBUTE	VALUE
#Q	(**Q**ueue) Number of interactions in queue. The alert is activated comparing its value with the maximum size of the queue.
MWT	(**M**aximum **W**aiting **T**ime) the time the oldest interaction is in queue. The alert is activated comparing its value with the maximum waiting time in queue and with the service objective.
EWT	(**E**xpected **W**aiting **T**ime) Estimated waiting time in queue. The alert is activated comparing its value with the maximum waiting time in queue and with the service objective.

Management Section

Transaction data of the current day and in parentheses the ones within the last 60 minutes.

ATTRIBUTE	VALUE
Tr	Number of **Tr**ansactions of the day.
UC+	Number of closed transactions using call dispositions with a positive **U**seful **C**ontact (+).
UC-	Number of closed transactions using call dispositions with a negative **U**seful **C**ontact (-).
NUC	Number of closed transactions using call dispositions with **N**on-**U**seful **C**ontact.
NC	Number of closed transactions using call dispositions with **N**on-**C**ontacted.
Ab	Number of closed transactions with an **A**bandoned call disposition.
Ds	Number of **D**iscarded transactions with a closed Queue or a saturated Queue.

Records Section

Client information

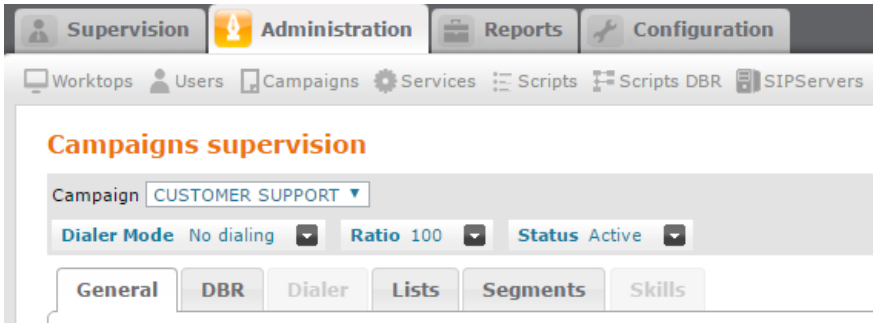
ATTRIBUTE	VALUE
NS	**Non-callback** (in list 0).
SS	**System callback** (in list 1).
AS	**Agent Callback**s (in list 10).
C	**C**losed by the agents (status 300).
D	**D**iscarded (status 100, 101, 102, and 103)

7.3.4 SUPERVISING A CAMPAIGN

Once the campaign has been selected, the screen with the information pertaining to the supervised campaign is shown.

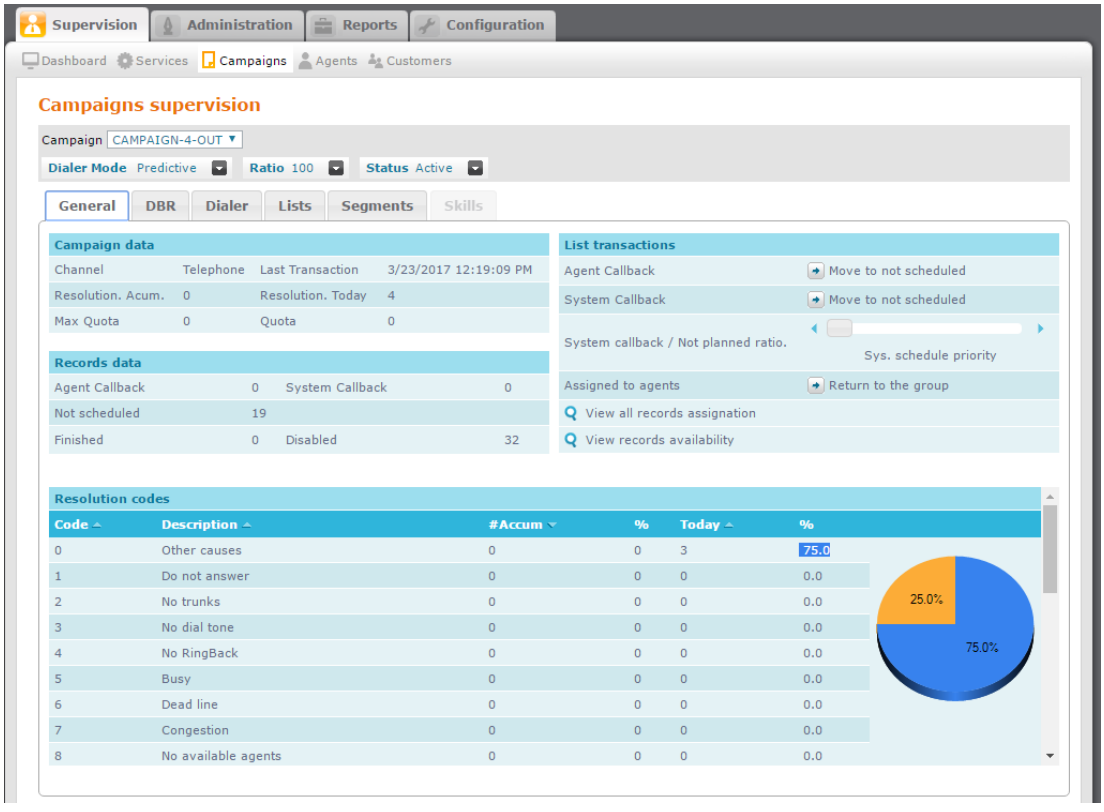
The information is allocated to the following areas:

- Navigation bar that allows to choose the campaign to be supervised and to run actions on it: dial-up, weight, status.
- Data area: it contains information on the campaign organized under the tabs General, DBR and Dialer.



The content blocks of the tabs are:

- General Tab
  - Campaign Data.
  - Record Data.
  - List Management.
  - Segments.
- DBR Tab
  - Queue interactions.
  - Managed interactions.
  - Service Level.
- Dialer Tab
  - Dialer status.
  - Dialer configuration.
  - Agent waiting time.
  - Calls made.
  - Abandoned calls.
  - Retention time.
- Call dispositions (appears in every tab)



7.3.4.1 NAVIGATION BAR

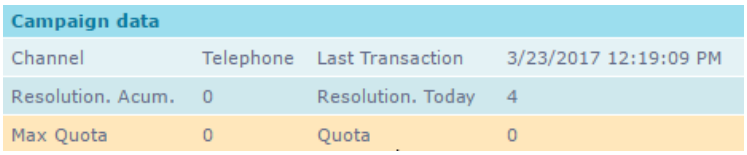
During the normal campaign activity, it is possible to modify the following configuration parameters of the supervised campaign:

- Dial-up mode
- Weight
- Active/Inactive

Campaign configuration parameters

7.3.4.2 CAMPAIGN DATA

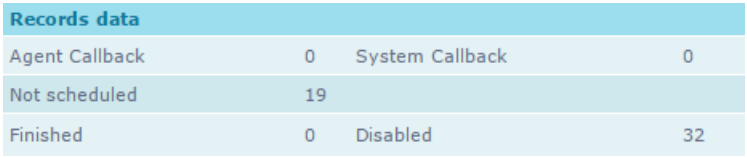
They are shown in the following information related to the campaign:



ATTRIBUTE	VALUE
Channel	Main channel. Example: telephone
Las. Transaction	Date/Time of the last transaction task performed
Clossed Acum.	Accumulated call closed
Closed Today	Closed performed during this day
Max. Quota	Maximum set-up quota
Quota	Attained Quota

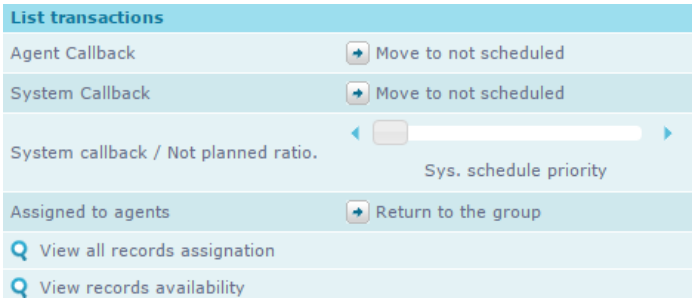
7.3.4.3 RECORD DATA

They are shown in the following information related to the campaign records:



ATTRIBUTE	VALUE
Agent Callback	Number of Agent Callback records
System Callback	Number of System Callback records
Non Callback	Number of no planned records
Finished	Number of records closed by the agents (status 300).
Disabled	Number of disabled records (status 100, 101, 102, and 103)

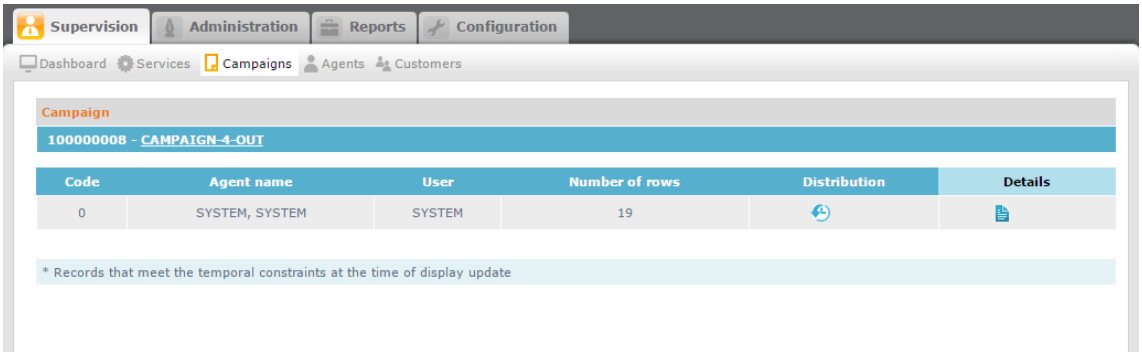
7.3.4.4 LIST MANAGEMENT



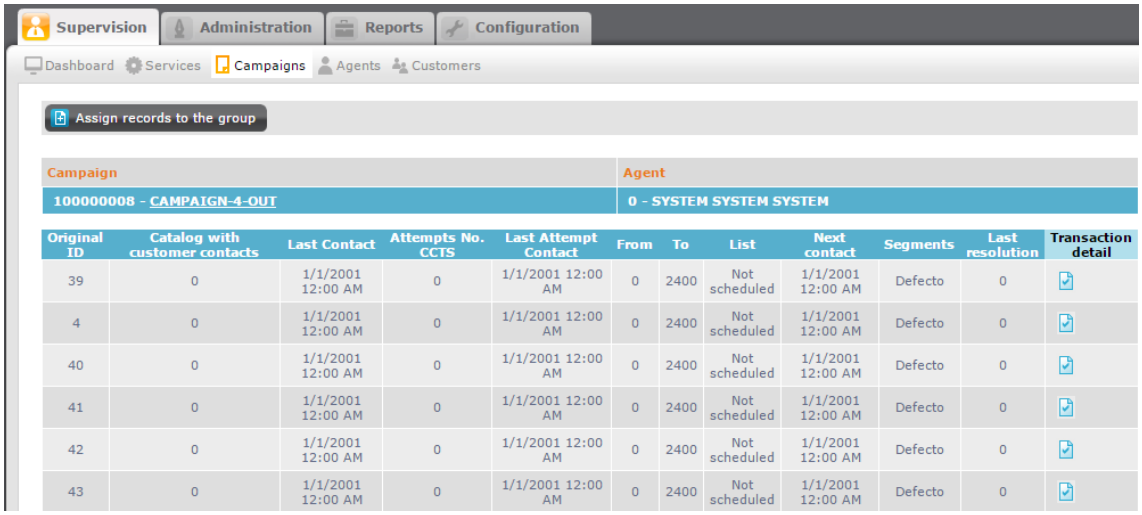
The following actions are allowed:

- See details of the List Management
- Go to non-callback (“Agent Callback” and “System Callback” lists).

- Establish the ratio of records delivery among system callback and non-callback lists). It can happen that any of the lists can have absolute priority over the other or that a series of records can be respected:
    - **Priority for Sys.Callback**, all the records from the system callbacklist as possible will be delivered first and then, those from non-callback lists.
    - **N:1**, for each N records of the system callbacklist, 1 of the non-callback lists will be delivered.
    - **1:N**, for each record of the system callbacklist, N will be delivered from the non-callback list.
    - **Priority for Non-Callback**, all the records from the non-callback lists as possible will be delivered and then, those from the system callbacklist.
- See the records assigned to the agents



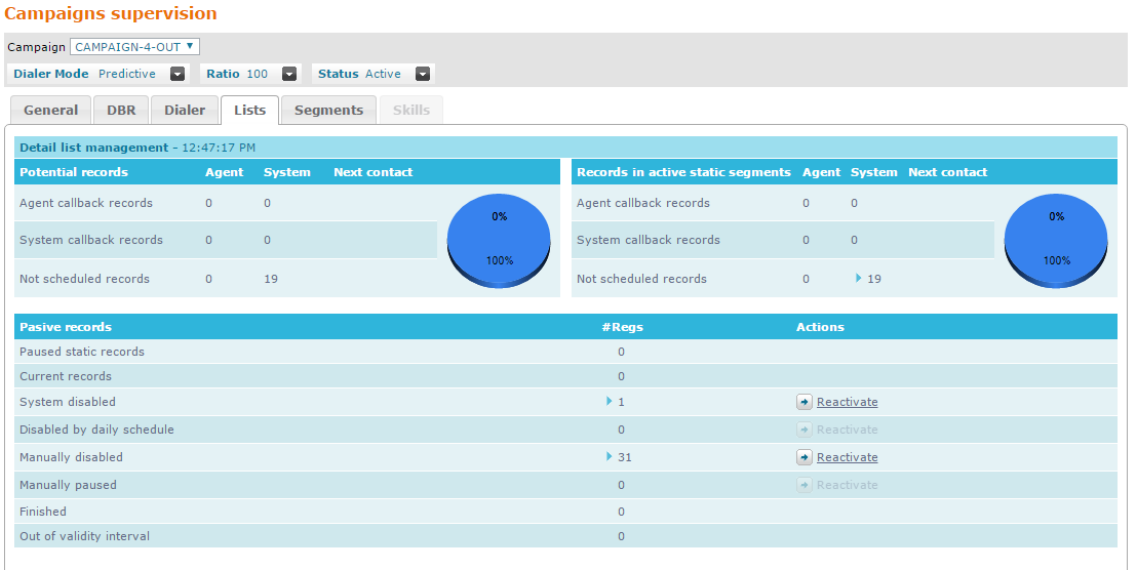
If we click on the record allocation icon, we will access the detailed information allocated per hours:



And clicking again on one of the figures shown, you can browse the client Supervision screen with the parameters required to perform actions with these records (for example, change their allocation or their schedule).

7.3.4.5 RECORD DETAIL

With the tap Lists a higher level of detail is obtained.



This window displays:

- **Potential records**: all clients that are in a 0=available status.
    - Records assigned to each list: non-callback, System callback, Agent callback.
    - Records assigned to Agent and Records Assigned to the System.
    - Time/Date of the next available record.
    - Allocation graphic per lists.
- **Records in active static segments.**
    - Records assigned to each list: Agent callback, System callback, Not scheduled.
    - Records assigned to Agent and Records Assigned to the System.
    - Time/Date of the next available record.
    - Allocation graphic per lists.
- **Passive records** (that are not in the available status).
    - Records in paused static segments. They can be delivered among them, at the same time, they belong to an active dynamic segment.
    - Current records.
    - System disabled.
    - Disabled by to daily schedule.
    - Manual disabled
    - Manually paused
    - Finalized
    - Out of Valid Date

It is possible to see the details in the records of the list by pressing on the link related to the calls number.

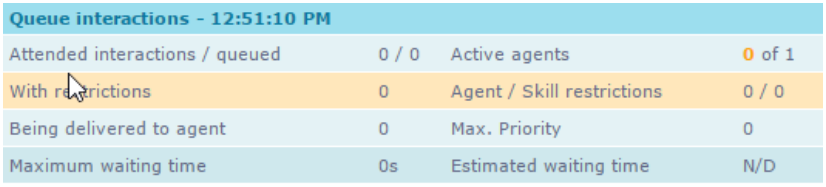
The potential records are open to be delivered based on the record status. However, if they belong to a paused static segment, they might not be delivered.

It is also possible that there are records in a list and that these calls are not made because the proper conditions do not exist, for example: the call-back time for the call is not respected or the agent assigned is not active at the moment.

On the other hand, for the case of the records in paused static segments, these records will not generally be delivered. Even if it is possible to call a client of this group because the client belongs to an active dynamic segment. Let's remember that a client belongs to a unique static segment, but he/she cannot belong to 0,1 or more dynamic segments simultaneously.

7.3.4.6 QUEUE INTERACTIONS

This content block shows the real information of the queue status.

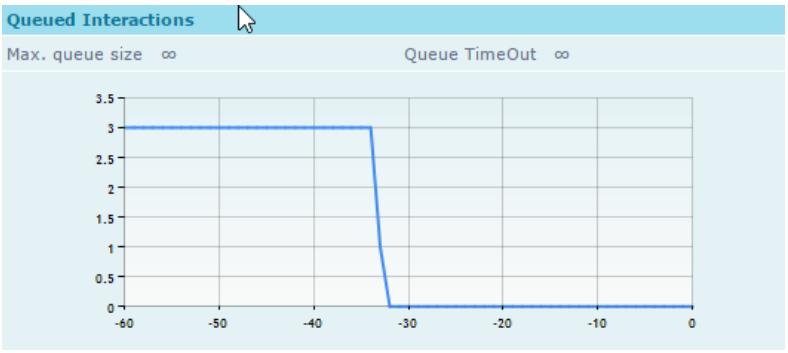


Information coming from the queue:

- Total number of queue interactions.
- Total number of active Agents logged in and participating in the campaign.
- Number of calls with restrictions with a break down by agent and by skill.
- Number of calls being transferred to the agent.
- Calls in maximum priority.
- Queue waiting time that the oldest call has (maximum).
- Estimated waiting time.

7.3.4.7 QUEUE INTERACTIONS GRAPHIC

Detailed graphic of the Omni+ of the queue interactions during the last hour.



7.3.4.8 MANAGED INTERACTIONS

This content block shows the information of the interactions accepted in interactions managed during the day and during the last hour.

Transaction Interactions - 12:53:12 PM		
	Today	Last hour
Accepted in queue	1	1
Abandoned	0 (0%)	0 (0%)
Handled	4 (400%)	4 (400%)

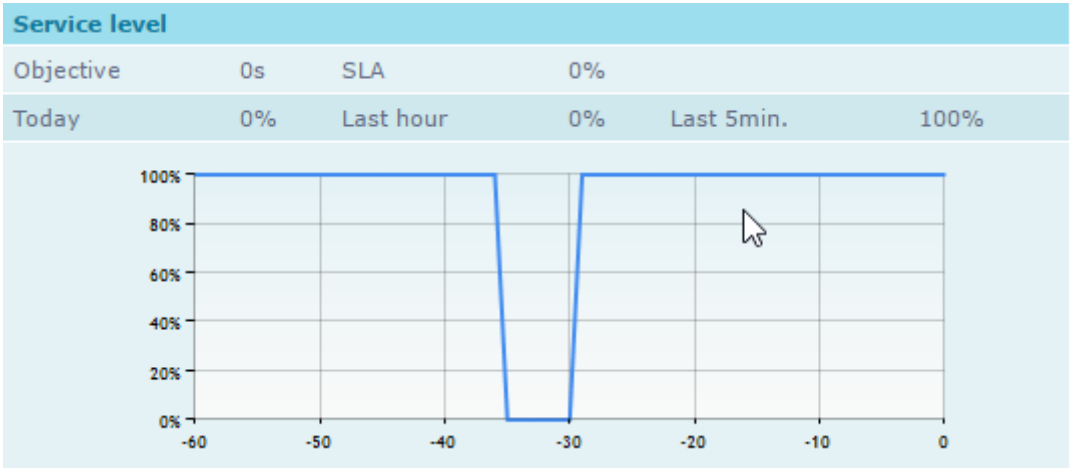
Information on the managed interactions:

- Number of interactions accepted in the queue.
- Number of abandoned calls + % (abandoned/accepted).
- Number of calls served + % (served /accepted).

7.3.4.9 SERVICE LEVEL

Information on the campaign SLA:

- Of this day.
- Of the last hour.
- Of the last 5 minutes.
- Detailed graphic on the Omni+ of the SLA during the last hour (the red dots show the SLA currently set up).



7.3.4.10 DIALER STATUS

This content block displays the current information on the dialer status and a detailed graphic with the accrued dialer calls made during the last hour.

Counter status - 12:54:10 PM			
Contact time	0s	T. Agent (ges./wait.)	0s / 1s
Retention Time	0s	Probability of being positive	100%
Dialing call	0	Retention calls (C/Q)	0 / 0
Agents (D/A/T)	0 / 0 / 1		

Information coming from the dialer:

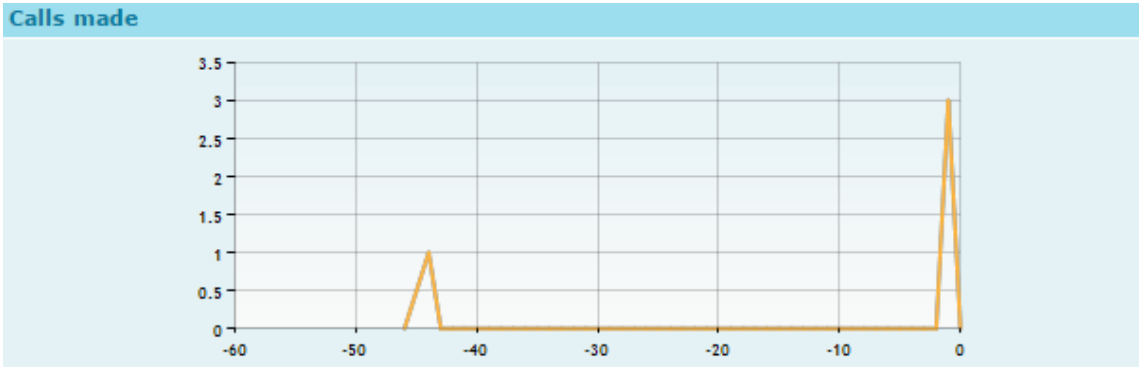
- Contacting average time (between dial-up and establishing the call).
- Average time of the campaign management and that an agent must wait to receive a management task.
- Average time that a call remains in retention.
- Possibility to obtain a positive contact with the client.
- Number of calls in dial-up.
- Number of calls in retention.
- Total number of active Agents logged in and participating in the campaign.

7.3.4.11 AGENT WAITING TIME GRAPHIC

Average agent waiting time during the last hour.

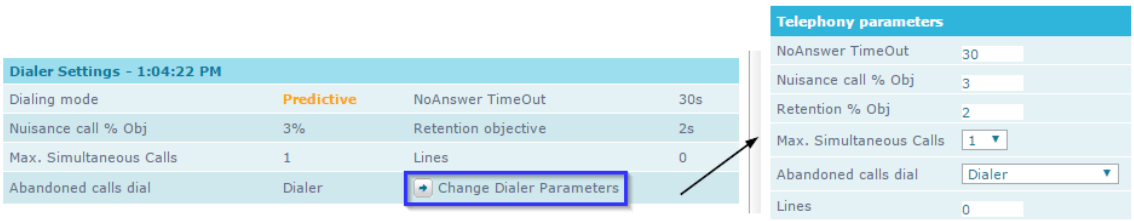
7.3.4.12 CALLS MADE GRAPHIC

Number of calls made and answered during the last hour, accrued per minute.



7.3.4.13 DIALER CONFIGURATION

This content block displays the dialer configuration.



Information on the dialer configuration:

- No Answer timeout.
- Objective for the percentage of nuisance calls.
- Objective for the retention time.
- Maximum simultaneous calls.
- Number of dialer lines assigned to the campaign.
- Dial-up mode for the records abandoned during the last hour.
- Change dialer parameters allows to edit the dialer parameters.

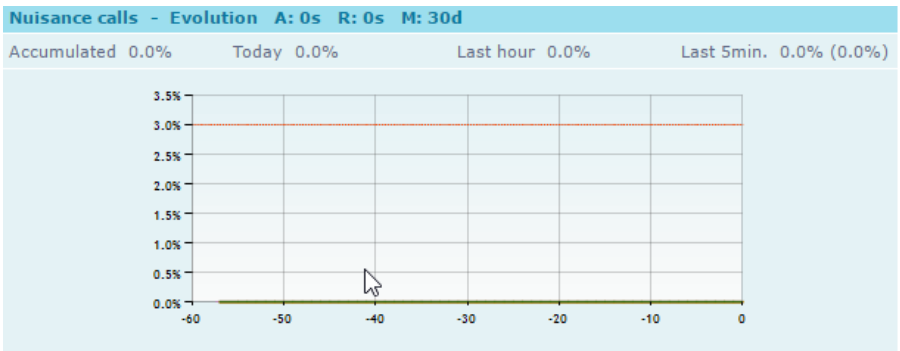
7.3.4.14 NUISANCE CALLS

Information on nuisance calls:

- Percentage of this day.
- Percentage of the last hour.
- Percentage of the last 5 minutes and the value of the average abandoned that is used to adjust the dialer behavior.

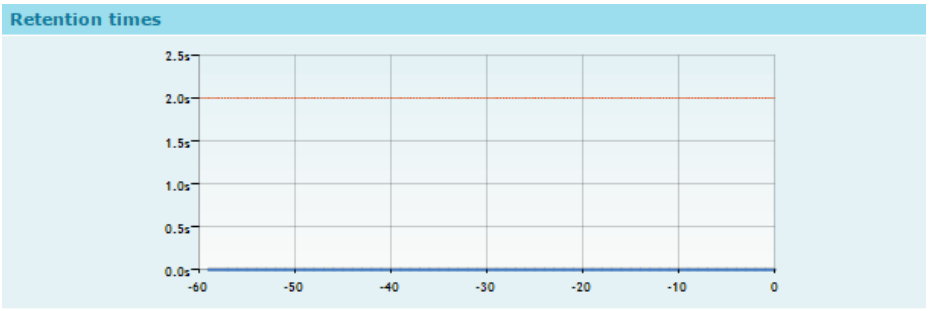
Graphic that displays the Omni+ of the nuisance calls during the last 60 minutes:

- Blue: average of nuisance calls per minute.
- Orange: value of the average of nuisance calls accrued per minute.
- Pink: total number of nuisance calls in that minute (scale to the right).



7.3.4.15 RETENTION TIME GRAPHIC

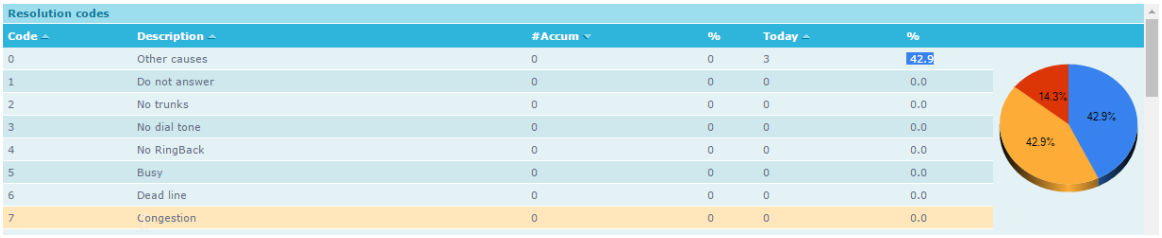
Retention time during the last hour (the red dots show the objective for the retention time set up at present.



7.3.4.16 INFORMATION ON THE RESOLUTION CODES

In this information block about resolution codes, it is possible to look up the following data of every call disposition defined for the selected campaign.

- Code and description: Data to identify the call disposition.
- Acum.: Number of closed transactions from the campaign start-up.
- Percentage (%): Percentage of the closed transactions numbers from the campaign start-up.
- Today: Number of closed transactions of the day.
- Percentage (%): Percentage of the closed transactions numbers in total for this call disposition on the total for all the call dispositions.
- Graphic with the most important call dispositions of this day.



7.3.4.17 SEGMENT SUPERVISION

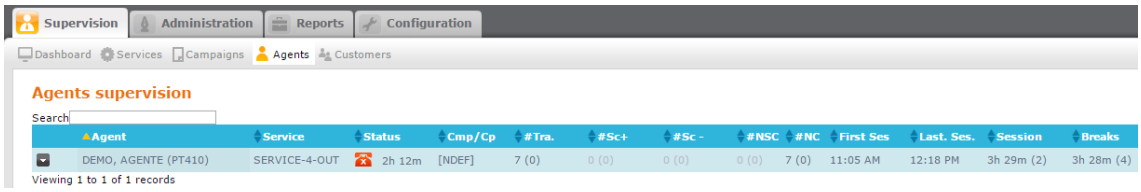
The segment supervision area displays the following data for each segment defined in the campaign:

- Segment name
- Status (active/paused/maximum quota)
- Relative priority
- MaxQuota
- Quota#

- Active records (available in active lists)
- Passive records (they are in passive lists)
- Action (it allows to active/pause each segment)

7.3.5 AGENTS SUPERVISION

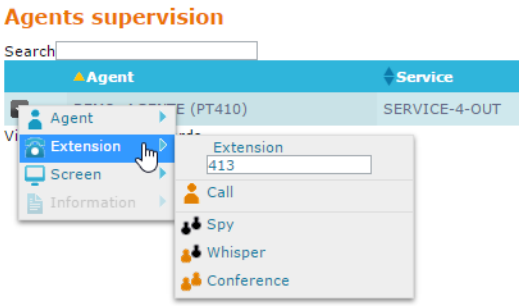
The agents' activity can be controlled from this page.



ATTRIBUTE	VALUE
Agent (Workstation)	Agent name and in parentheses the workstation he/she is using.
Service	Service in which the agent is logged in at present.
Status	Agent status and duration of such status. If the agent is in management tasks time, this is shown in parentheses during such tasks. If the agent is in Management task time, an alarm is shown when the management task time configured for the campaign is passed.
Cmp/Pau	Campaign name if the agent is in management tasks time or pause reason if the agent is “Not Available.”
#Tra	Number of transactions finalized during the day and in parentheses the ones within the last 60 minutes.
#UC+	Number of closed transactions using call dispositions with “useful positive contacts” during the day and in parentheses the ones within the last 60 minutes.
#UC+	Number of closed transactions using call dispositions with “useful negative contacts” during the day and in parentheses the ones within the last 60 minutes.
#NUC	Number of closed transactions using call dispositions with “Non-useful contacts” during the day and in parentheses the ones within the last 60 minutes.
#NC	Number of closed transactions using call dispositions with “No contacted” during the day and in parentheses the ones within the last 60 minutes.
Pr.Se.	Start time of the first day session. If the first session has started the previous day, we will see an alarm and the start time will be 00:00 when placing the mouse on the alarm, we will see the date and start time of the first session.
LasSe.	Start time of the last session started.
Sessions	Total duration of the sessions of the day and in parentheses the total number of sessions. If the first session has started the previous day, we will see the duration of the session as an alarm when placing the mouse on, the duration will be shown including the session time from the previous day.
Pauses	Total time in “Not available” and in parentheses the total number of pauses.

7.3.5.1 CONVERSATION SUPERVISION

When pressing the first icon, the menu with the options that allow us to listen and participate in the agent conversations (“Extension” menu).



To call the agent we must introduce the supervisor extension and press on the “Call” icon. An agent call will be made.

In order to supervise a conversation, the extension from which we supervise the conversion must be entered and we need to select the supervision type.

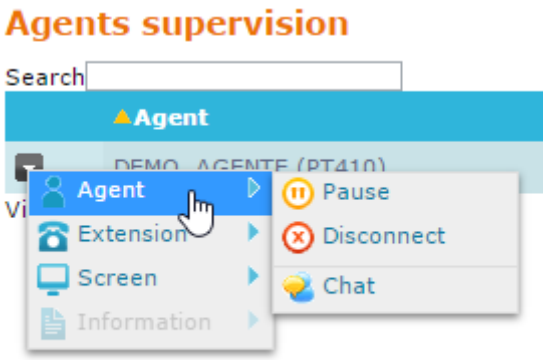
Once connected to the supervision mode, we can change to another mode by pressing the telephone key in such mode.

OPTION	KEY	DESCRIPTION
Spy	4	Only listening is allowed.
Whisper	5	Both can be listened and you can speak with the agent.
Conference	6	Both can be listened and you can speak with both.

> This functionality is only available to set up Manager properly. Revise the installation manual to set up Manager properly.
>
> The conference option is not available in Asterisk 1.4.x versions.

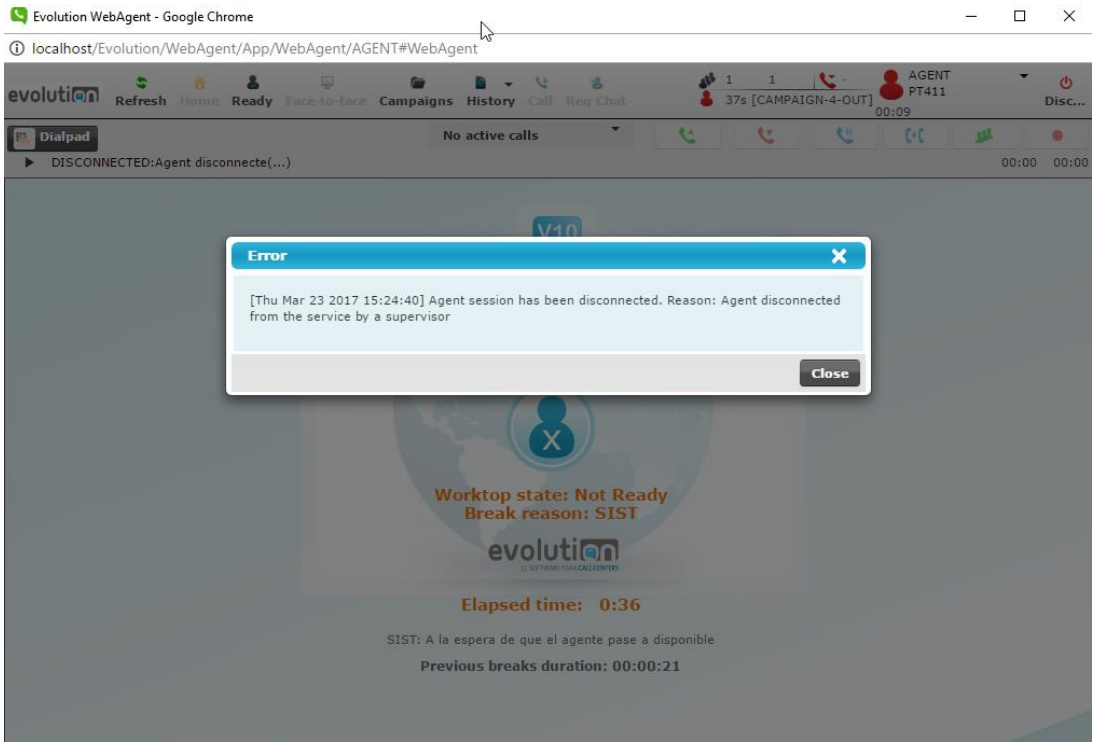
7.3.5.2 AGENTS ACTIONS

When pressing on the first icon ("Agent" Menu), a menu with options is activated to pause or disconnect an agent remotely from Manager and start an internal chat with the agent.



7.3.5.2.1 AGENT PAUSE/DISCONNECTION

An agent disconnection is performed and, besides, it causes that an active call the agent can have be interrupted. The agent will receive a management task message advising him of the action.



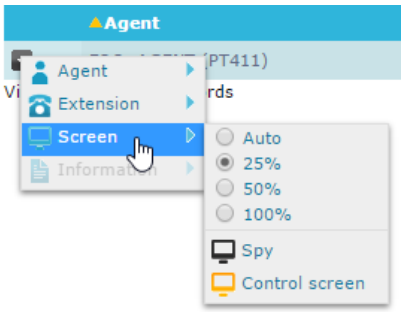
The agent pause causes that the agent goes into the “Not available” status as soon as possible (immediately or when finalizing the present management tasks). A new reason to pause the system will be used “Supervision pause.”

If a supervisor pauses an agent, this pause will **prevail over one that the agent can have previously requested** before finalizing the previous management task. For example, if the agent, during a management task, requests a pause for any reason and, before or after, a supervisor requests a pause for the agent, the agent will go to “Not Available” due to “Supervision Pause.”

As in the previous case, when a supervisor requests a pause, the agent will be notified (management task message) to be advised of this action.

7.3.5.3 AGENT SCREEN SUPERVISION

It is also possible to perform actions about the agent in the See screen and the Control screen. Both options appear in the contextual menu of actions on the agent.



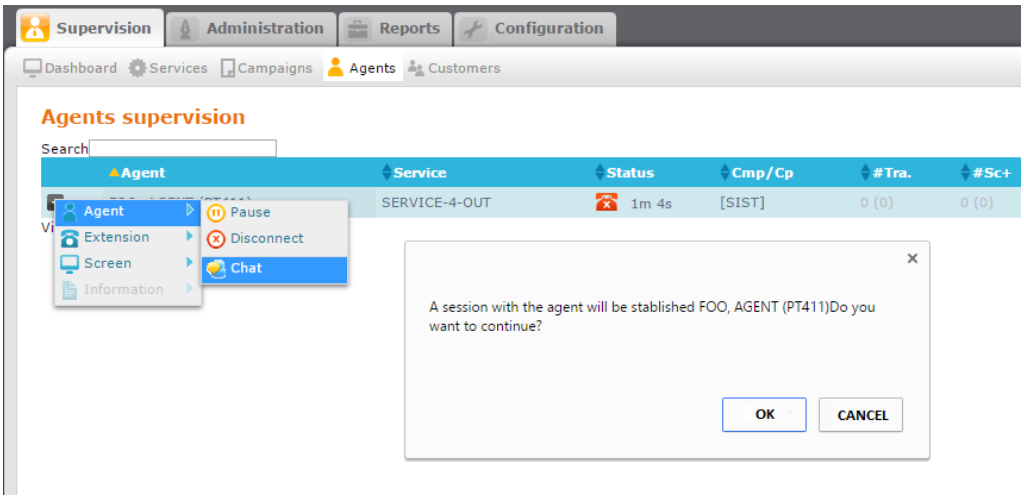
For each option, it is possible to choose the requested decision. Both options allow to visualize the agent session screen. The Control option allows also to control remotely the agent session.

It is necessary to highlight the following important aspects:

- The decision options refer to the dimensions on the agent screen.
- The surveillance process is secured through keys of 128 bits.
- Both surveillances types are possible when the agent has started session in iAgent.
- iAgent does not show any message to the agent (this does not know that is being observed).
- A maximum of three simultaneous spy sessions per agent are allowed.

7.3.5.3.1 INTERNAL CHAT WITH AGENT

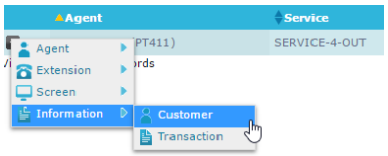
When pressing the chat option, a confirmation will be requested to establish a chat session with the selected agent and, in case of accepting, the chat will start.



The supervisor and the agent will be automatically shown in a new window with the chat session already started.

7.3.5.4 ONGOING MANAGEMENT TASK INFORMATION

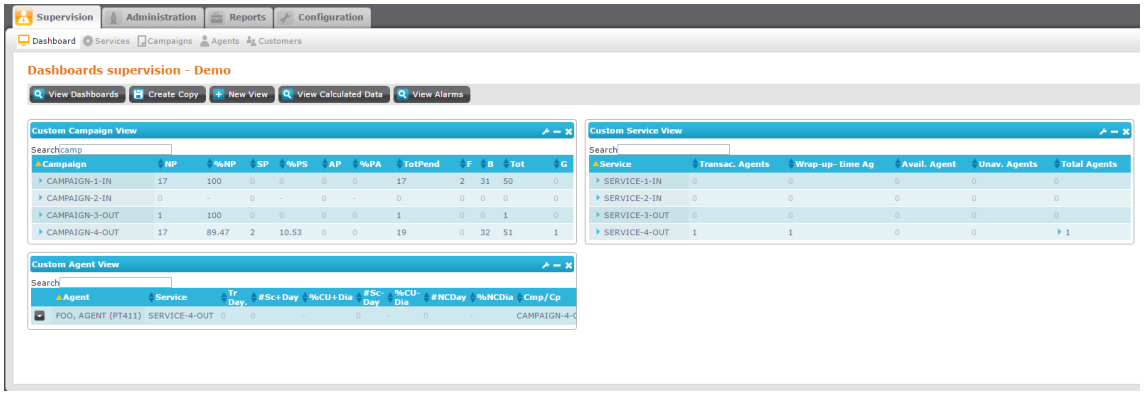
When pressing the first icon, the menu with the options that allow us to obtain information on the ongoing management task ("Information" menu).



Customer	Customer information.
Transaction	Transaction information.

7.3.6 DASHBOARD SUPERVISION

Through the dashboard supervision, we will customize the data to be supervised and organized through the Service, Campaign or Agent view in a unique screen. Every view will contain the same fields related to the previous supervision sections or the results of estimates calculated from them.



By using the [See command tables] button, different command tables belonging to the user will be managed and the command tables shared by others will be visualized.

Every command table, besides the name and description, will specify the number of columns containing the views and if we want them it to be public or not (i.e., if we want other users to use it in the read-only mode or not). A command table will only be modified by its author.

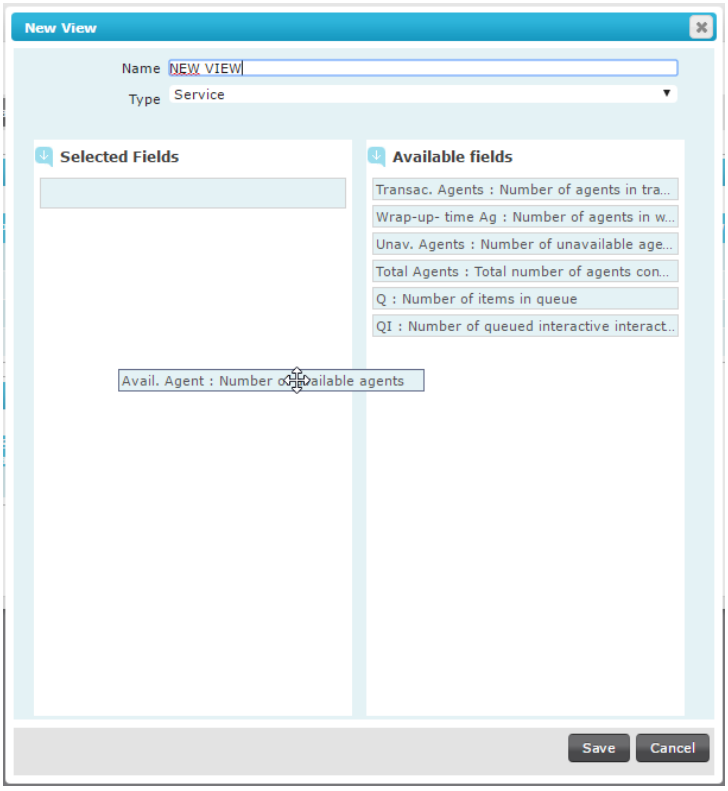
By using the [Create Copy] button, a copy of the command table will be made and the person creating the copy will be the copy author and will acquire the right to modify it.

7.3.6.1 DATA VIEWS

Once the command table is created, we will be able to add views on it. Each created view will belong to the command table under which it has been created.

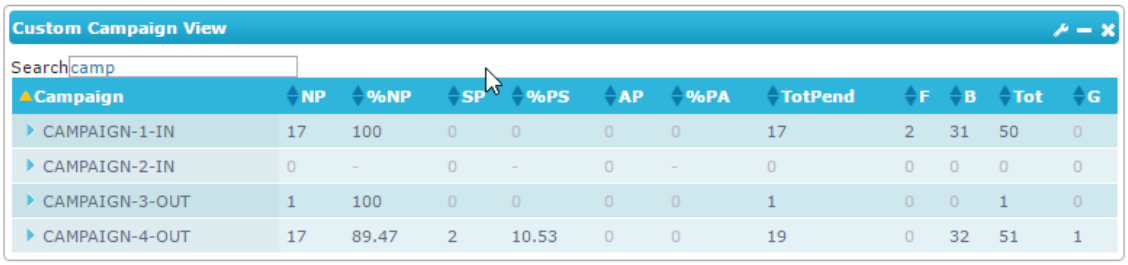
Each view belongs to the specific type (Service, Campaign or Agent) and can only contain its related fields or fields calculated from them.

In order to create a new view, we will press the [New view] button and a dialog box of view creation will be displayed. By using the mouse, we will drag the fields we want to be part of the view and we will organize them at out convenience.



Once the command table view is added, it will be relocated in a screen by dragging it to any of the columns containing the drag&drop command.

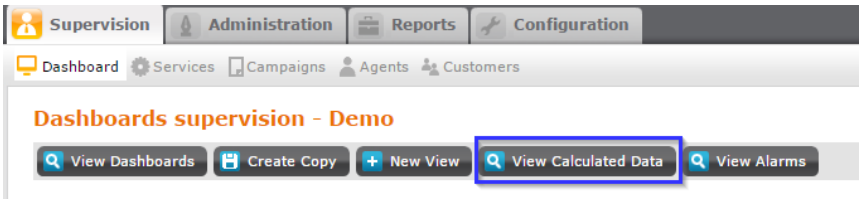
On the top right of each view, the icons actions are shown on the views that will allow us to remove, minimize or modify their fields.

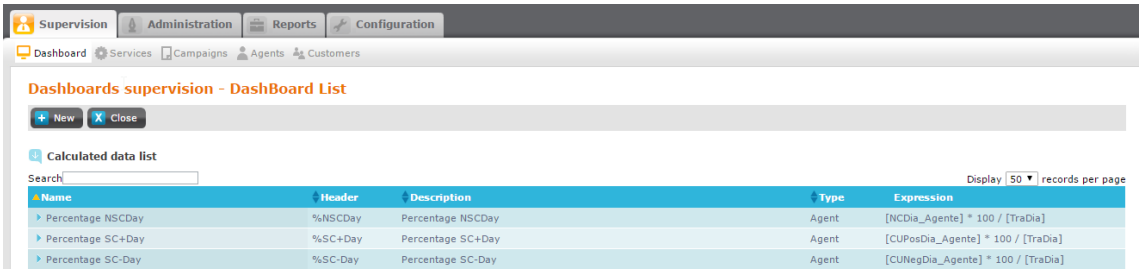


7.3.6.2 CALCULATED DATA

Within a dashboard, we can define data calculated from the data coming from every type of view. These calculated data can be shown in the views of the command table.

By using the [See calculated data field] button, the different calculated fields related to the present command table will be managed.

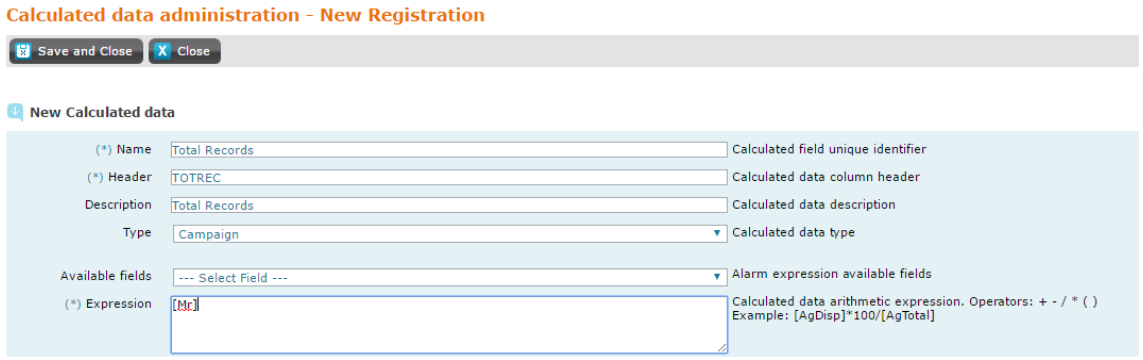




Every calculated data belongs to a specific (Service, Campaign or Agent) and can only contain operations with related fields.

The result of the calculated field must be of the numeric type and must be the result of an arithmetic operation that accepts the operators + - / * ( ). For example, the expression obtaining the percentage of agents in the available status in relation to the total would be [AvaiAg]*100/[TotalAg].

Once the calculated type that we want to define is chosen (Service, Campaign or Agent), we only need to choose the field from the [Available fields] drop-down menu in order to add fields and this will be automatically added to the end of the arithmetic expression.

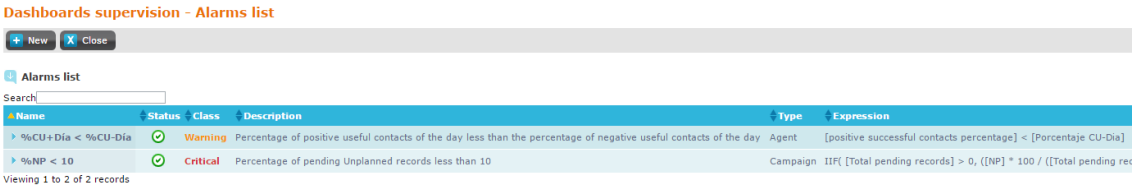


Every calculated field created within the command table will be available at the moment of choosing the fields in a view.

7.3.6.3 ALARMS

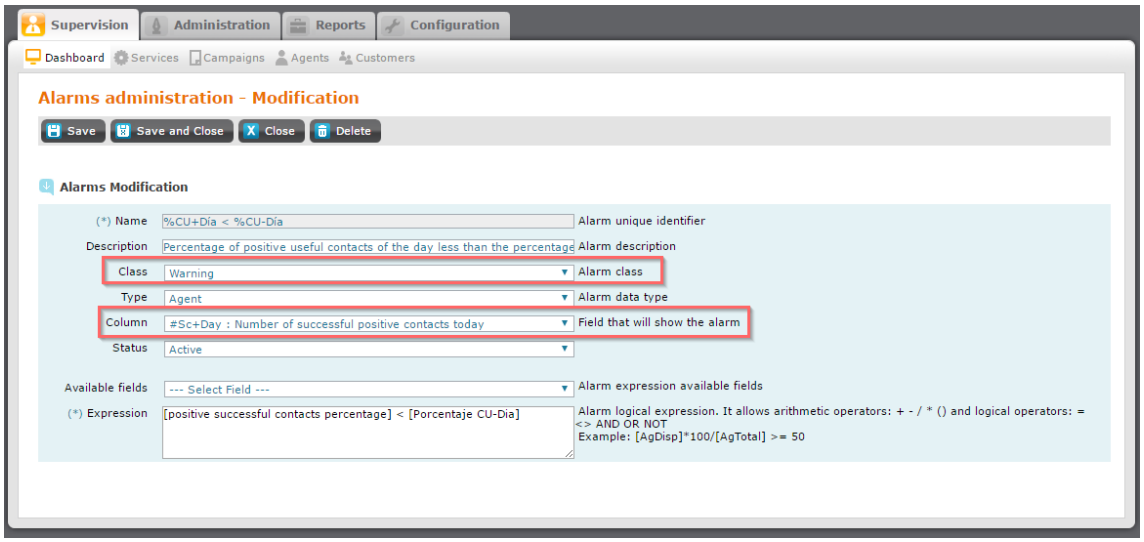
Within a table command, we can also define data alarms calculated from the data coming from every type of view. These alarms will activate in columns of the command table views.

By using the [See alarms] button, the different alarms related to the present command table will be managed.



Every alarm belongs to a specific (Service, Campaign or Agent) and can only contain operations with its related fields (including calculated data).

Every alarm must indicate what type (or severity) will have and the column of the view data that will be shown.

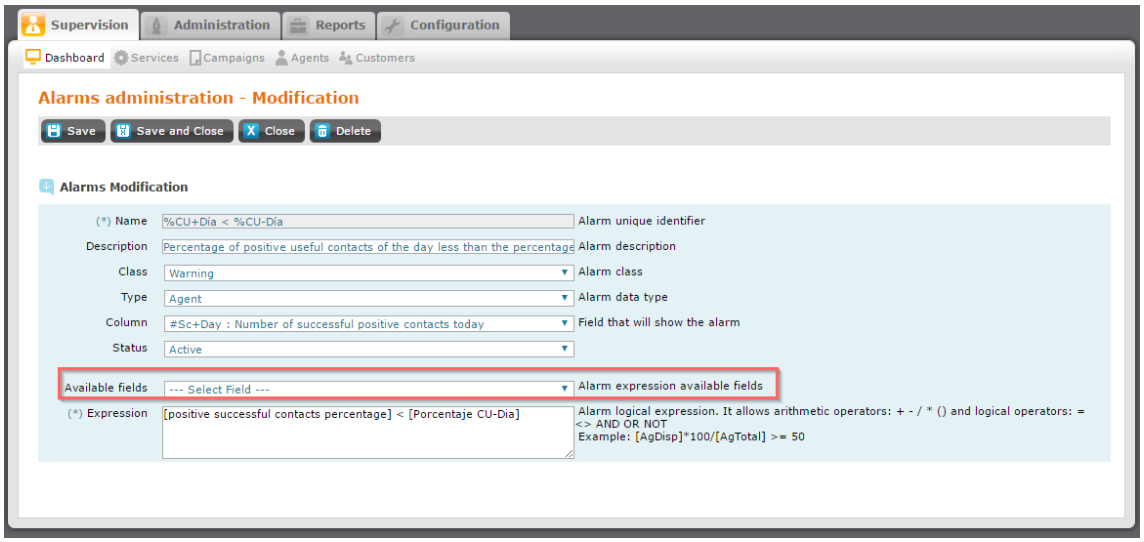


Color code of alarm class organized from lower to higher severity:

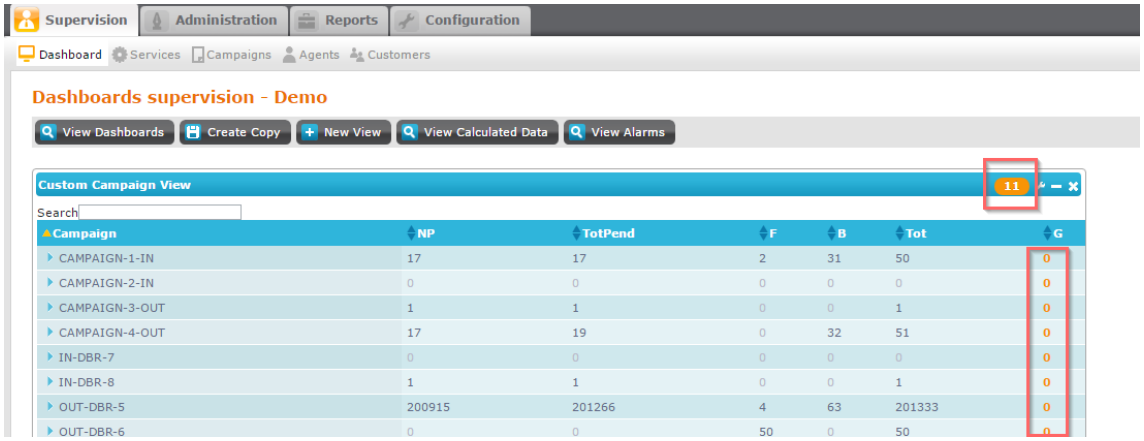
Green	Information
Orange	Notice
Red	Critical
Black	Technical error (for example, assess a syntactically incorrect expression)

The result of the alarm expression will be of the Boolean type (True or False) and resulting from an operation accepting arithmetic operators: + - / * ( ) and comparative operators = < > AND OR NOT IN. The function IIF is also accepted. It has the following syntax: IIF(expr, truepart, falsepart). For example, the expression assessing the percentage of agents in available status in relation to the total is greater than 50 would be [AgDisp]*100/[AgTotal] > 50.

In order to add fields to the expression, we only need to choose the field from the [Available fields] drop-down menu and this will be automatically added to the end of the Boolean expression.

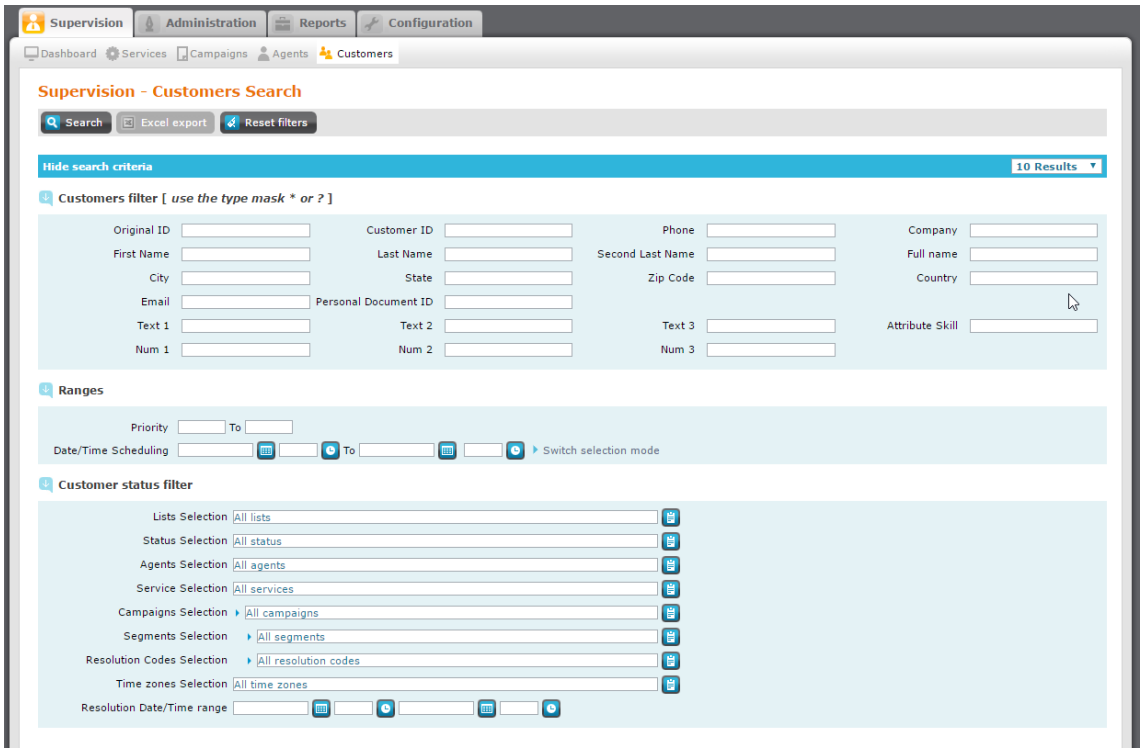


Once the alarm is set up, it will be visible in the views containing the related column that will be shown highlighted in the color corresponding to its type. At the same time, at the top of each view of the command table, the total of alarms applying to their fields will be shown and, on the top bar, always visible, the total of alarms of the command table will be shown. The color of the total will be of a higher hierarchy (see color code).



7.3.7 CUSTOMERS SUPERVISION

Through the client supervision, we will be able to search records complying with the selection criteria based on the decisions made and we will apply operations (Change of status, lists, allocation and priority).



Client filters: Enter the data you know from the client in order to restrict the search. You can use wildcard characters to make your search easier.

For example:

Telephone = 99* will search all the telephone numbers starting by 99 .

Telephone = 99? It will search all the telephone numbers starting by 99 and having three characters.

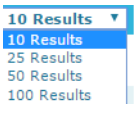
Ranges:

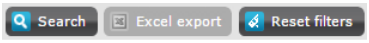
- Client priorities: allows to specify a priority range (from/until). Only the clients with priority will be shown within the selected range. If a value is not specified, it is understood that there is no inferior or superior limit in that range.
- Re-scheduling date/time: allows to specify ranges of the re-scheduling dates, the scheduled records will be chosen for the specified range.

Client status filters:

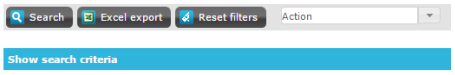
PARAMETER	DESCRIPTION
List	List to which the records belong.
Status	Present state of the records.
Agent	Last agent assigned to the client. The SYSTEM agent indicates that the record is not assigned to any agent in particular (it is assigned to the group).
Service	The campaigns that belong to a service.
Campaign	The campaign to which the clients belong.
Segments	The segment to which the clients belong.
Call dispositions	The last call disposition the clients have received.

You can choose the number of results that the search will show.





The filters applied to each search are saved as long as the page is not changed. Press clean filters to delete filters.
Press Search to start.



When searching, the filter section collapses and two new options appear on the page task bar. In order to see the filters, press on the "Show search criteria" bar. The other two options allow to export the present records page to Excel and select the action that will be applied to the records.

On the upper right part of the list, we will be able to see the controls allowing to browse through the records lists. Go to the first page, to the previous page, calculate the total of records and reload the page and go to the next.

The reason the total of records can change is because if the center is ongoing the clients' properties can change while we are looking at the list and they stop belonging to the list of filtered records or that the new records belong to the list.

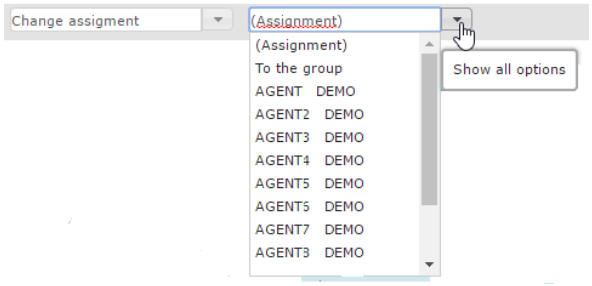
When changing the number of visible results, the results list will be automatically updated showing the new quantity of selected records from the record that we are presently seeing.

For each record, we will have the following information: client Id., Name and Last name, ID, Telephones, e-mail, Population (if we place the mouse on it, we will see the province and country), Company, Campaign to which the client belong, Last agent assigned, State (the numeric value is shown but leaving the mouse on it, we will see its description), List to which it belongs (he numeric value is shown but leaving the mouse on it, we will see its description), Last call dispositions received and Subject.Id (Intern code).

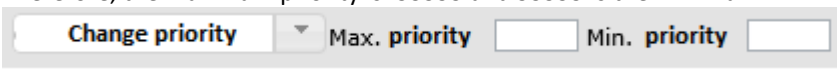
We can select individually each record by marking its case or the whole page by marking the case that is part of the list head.

Besides, when pressing the client name, we will go to the detail page of it (7.5.5.1.2 client information view), where we can edit and apply the following modifications to the records:

- Change of status to:
  - Available.
  - Paused.
  - Manual Paused.
  - Closed.
- Change of list to:
  - Non-callback.
  - Callback by the system. The date/time to which these records need to be rescheduled will be requested.
  - Callback by agent. The date/time to which these records need to be rescheduled will be requested.
- Change of assignment:
  - To group.
  - To a specific agent.



- Priority change
  - In this case, two new Priority fields will appear and we must specify what client max and min priority we wish to establish. Remember that the priority is a number between -99999 and 99999. The priority is understood as "a position in a waiting queue." Therefore, the maximum priority is -99999 and 99999 is the minimum.

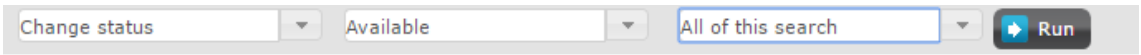


Note: keep in mind that when the client priority is established, the adjustment of priority is restored to the neutral value 0, i.e., the effective priority matches the client priority.

In general, combo boxes can be selected by pressing the down arrow (and all the options will be shown) or by writing the text, in which case, only the options containing such text will appear. It can be useful, for example, in the assignment of agents, to filter the number of agents by name.

Once the change is selected, we must indicate what records will be affected:

- The selected records: those having its selection cell marked.
- All the present page: all the ones we are seeing in the present page, regardless of the ones that are marked or not.
- All this search: all the ones complying with the search criteria indicated. In this case, a double confirmation will be requested informing us of the approximate total of records that will be affected.



We will press run and after applying the modification to the records we have indicated; we will inform of the total of records affected and the search will be reloaded.

Notes on the modifications:

1. In case of selecting all the records, it will only be applied to the records which value is different from the new value we wish to apply.
2. If the record status is changed to "available": the locators will be reactivated and, if it is not possible, the record will be deregistered.

7.4 ADMINISTRATION MODULE

Administer, or set up, the **Omni+/Manager** environment, means to register users, campaigns, services, workstations, scripts, agents. It also implies performing system uploads (generate contact lists) when required and clean the historical information on the contacts and/or agents.

The following administration options are available:

- Workstations
- Users
- Campaigns
- Services
- Scripts
- DBR Scripts
- SIP servers
- Recorders
- Messages
- Events

When trying to do the initial configuration, it is recommended to follow the following order in the creation of objects:

1- Workstations

2- Users

3- Applications/scripts

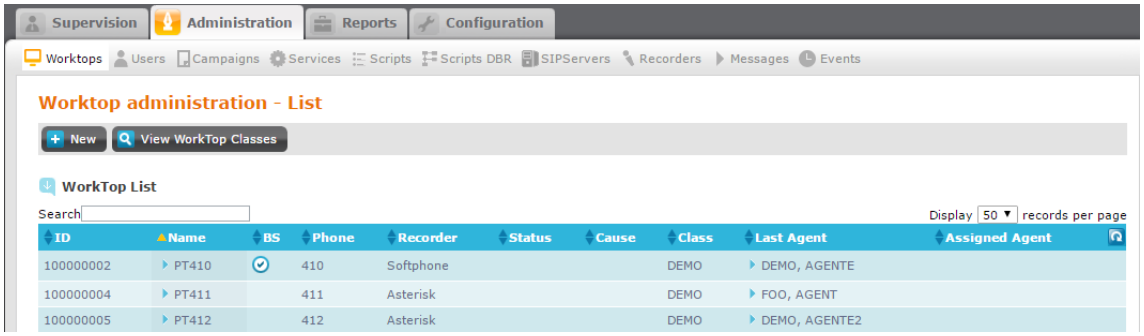
4- Campaigns

5- Services

6- Assignment of participation opportunities among agents and services.

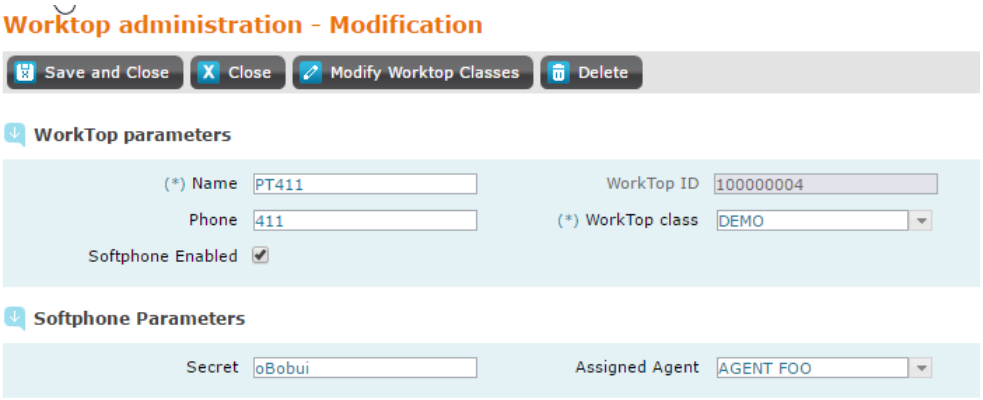
7.4.1 WORKTOPS

When selecting the Worktops option from the menu, the general view of Workstations is shown. If there are no workstations registered in the system, the workstation registration/modification view is automatically displayed.



The SI changes (integrated softphone), assigned Agent and logical telephone are shown or not according to the telephone private branch exchanges set up in Omni+.

7.4.1.1 WORKTOPS REGISTRATION/MODIFICATION


Worktop administration - Modification
Save and Close
Close
Modify Worktop Classes
Delete
WorkTop parameters
(*) Name
PT411
WorkTop ID
100000004
Phone
411
(*) WorkTop class
DEMO
Softphone Enabled
Softphone Parameters
Secret
oBobui
Assigned Agent
AGENT FOO

To register a workstation, the following field must be entered:

PARAMETER	REQ	DESCRIPTION
Name	✓	Name to identify the workstation.
Telephone		Telephone number related to the workstation. This extension cannot match the telephone neither the logical telephone of any existing workstation. The telephone and logical telephone of the same workstation must match. This parameter is mandatory so that the user can participate in the telephone campaign.
Workstation Type		Additional description of the workstation, useful to establish different physical, logical, organizational locations, etc.
Integrated Softphone		It allows to enable the integrated softphone in iAgent for the Agent type users. This option is not available for all the telephone private branch exchanges.

Parameters with integrated softphone:

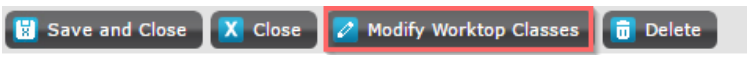
PARAMETER	REQ	DESCRIPTION
Secret		Password set up for the extension.
Assigned Agent		It allows to assign a specific agent to the extension so that if the agent starts session in any workstation, the agent will always do it with this extension. An agent can only be assigned to a workstation.
Recorder	✓	It allows to choose between Softphone and Server, i.e., if the recording is performed in the workstation o from the server.

When the integrated softphone is used, the agent will be seen connected to a workstation with the name 'EXT:extension'.

Parameters without integrated softphone:

PARAMETER	REQ	DESCRIPTION
Logical Telephone		Logical telephone number (identifier) that some telephone private branch exchanges allow to relate the telephone, generally related to ACD queues. This extension cannot match the telephone neither the logical telephone of any existing workstation. The telephone and logical telephone of the same workstation must match. This option is not available for all the telephone private branch exchanges.
Recorder		Recorder related to the workstation

7.4.1.2 WORKTOP CLASS REGISTRATION/MODIFICATION



By pressing in [ModifyWorkstation Type] in the workstation registration/modification screen, the Workstation Class can be modified and registered.

To create a new Workstation Type, the system only requires the workstation description since the identifier is automatically given.

7.4.2 USERS

A user is any person or system accessing the system directly or through the Omni+ application.

Four types of agent are considered:

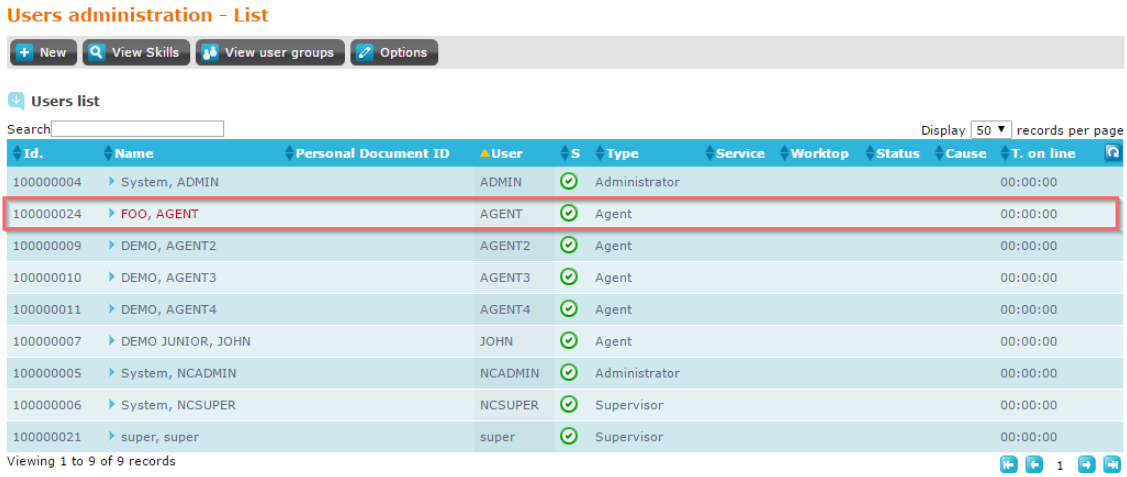
- Agent
- Supervisors
- Administrators
- Commercial

When pressing the Users option from the main menu, the general users view is shown.

The potential actions are:

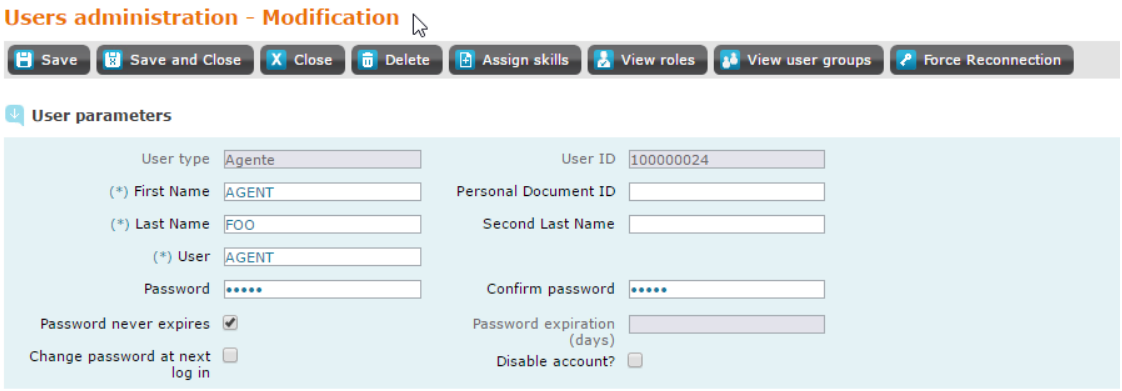
- Registration of a new user
- Modification of a user's data

If any user is blocked (by overcoming the number of failed start sessions attempts), this is shown in red.



If this list is empty, you can see the user registration/modification view automaticall

7.4.2.1 USER REGISTRATION/MODIFICATION



The required fields are:

USER PARAMETERS	REQ	DESCRIPTION
User type	✓	Agent, supervisor, administrator or commercial.
Name	✓	User personal name.
Last name	✓	User last name.
Last name		User last name.
ID		User ID number.
User	✓	Identification the user must provide to start a session. It is important to remember that there must not be more than 16 characters.
Password		User password. The password distinguishes in between lower case and upper-case letters.
Confirm password		User password (it must match the previous one).
The password never expires		Mark to indicate that the password will never expire.
Change the password for the next session		Mark to force the user to change the password in the next session start.
Password valid days		Number of days that must pass for a password to expire. This field will be disabled if the password never expires.
Disable the account?		It allows to disable the user account. The users with a disabled account cannot connect to the application agent/manager.

Depending on the telephone private branch exchange, the following parameters can appear:

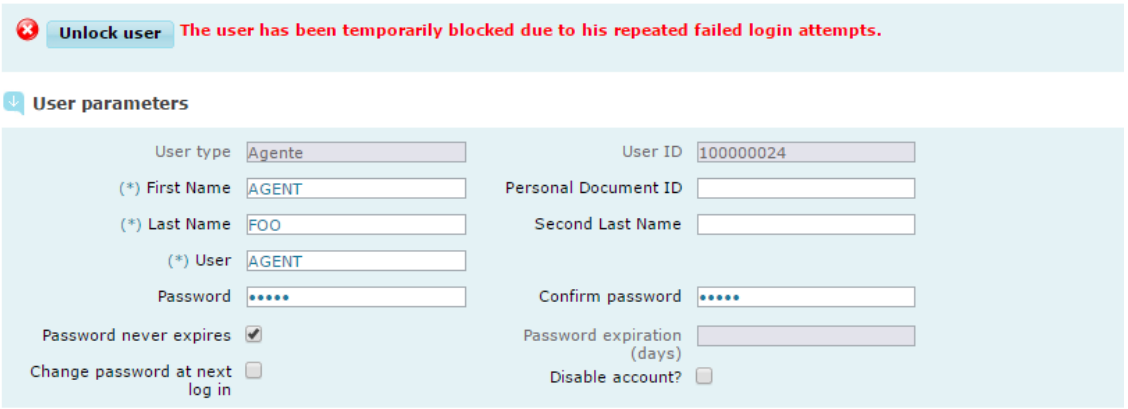
ACD PARAMETER	REQ	DESCRIPTION
ACDLogin		Identification for the user to access to ACD.
ACDpassw		Password for the user to access ACD.

7.4.2.2 USER BLOCKING AND UNBLOCKING

Omni+ integrates a blocking mechanism for the user account when there are consecutive failed attempts to start session.

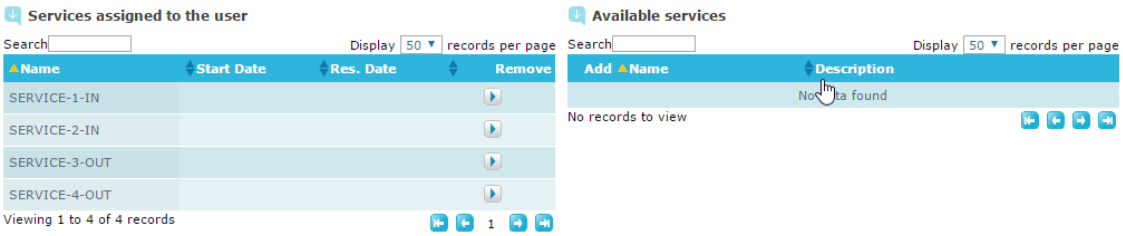
A user cannot perform more than 4 consecutive failed attempts (less than 1 minute among attempts). Once this threshold is passed, the user remains blocked for 5 minutes and cannot start session until the time has passed or until the administrator unblocks the user through the procedure explained below.

If the user is blocked, a button to unlock him/her is shown.



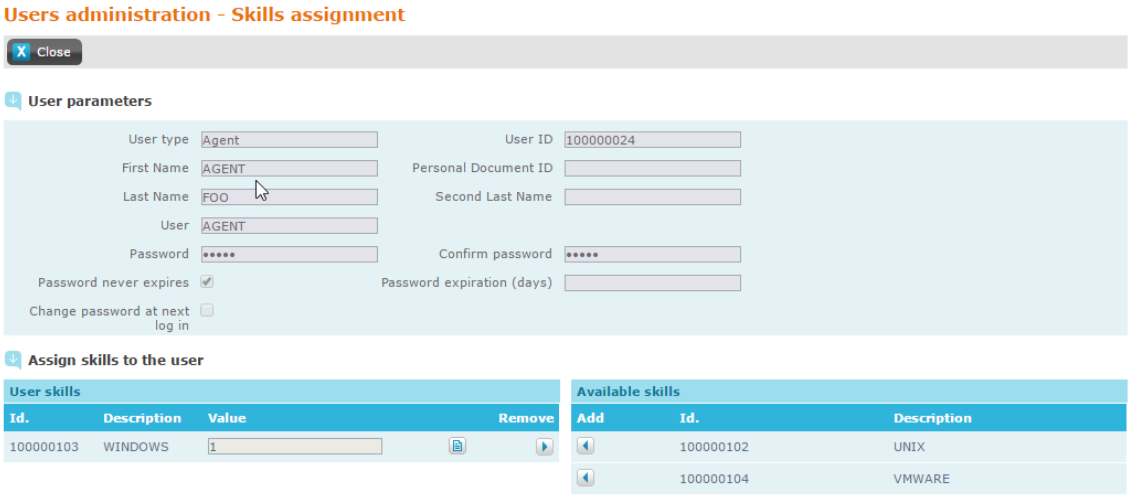
7.4.2.3 USER SERVICES ASSIGNMENT

The services assigned to the user can be set up for the user by adding/removing services with the arrows.



7.4.2.4 ASSIGN USER SKILLS

Through the [Assign Skills], we can assign skills and establish the level of each of them (values from 1 to 100). This allows the DBR Omni+ to deliver the calls to the agents having the ability to serve them.



7.4.2.5 SEE USER ROLES

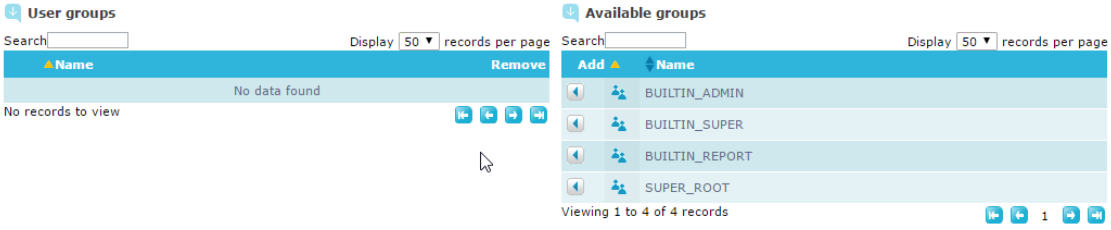
By using the [See roles] button, we can administer the user roles. The available roles have auto-descriptive names and they are the following:

- Access the download portal of the agent application (click-once)
- Administer campaign calendars
- Administer campaigns
- Administer campaigns (per the assigned services)
- Administer queues
- Administer queues (per the assigned services)
- Administer DBR Scripts
- Administer routing strategies
- Administer call dispositions
- Administer call dispositions (per the assigned services)
- Administer user groups
- Administer messages to agents
- Administer messages to agents (per the assigned services)
- Administer pause reasons
- Administer pause reasons (per the assigned services)
- Administer workstations
- Administer users' roles
- Administer agent scripts
- Administer record segments
- Administer records segments (per the services assigned)
- Administer SIP servers
- Administer agents' skills
- Administer users
- Administer users (per the services assigned)
- Assign skills
- Assign skills (per the services assigned)
- Assign users and campaigns to services
- Assign users and campaigns to services (per the services assigned)
- Total control
- Obtain reports

- Obtain reports (per the services assigned)
- Publish scripts from the development environment
- Supervise services, campaigns and agents
- Supervise services, campaigns and agents (per the services assigned)
- Supervise-Administer your own command tables
- Supervise-Administer client records
- Supervise-Administer client records (per the services assigned)
- Supervise-Administer all the command tables
- Supervise-Edit from supervision
- Supervise-Listen to call recordings
- Supervise-Start chats with agents
- Supervise-Intrusion and listen to calls
- Supervision-Pause and disconnect the agents
- Supervision-Receive agent chat requests
- Supervision-See clients' records
- Supervision-See client records (per the services assigned)

7.4.2.6 SEE USER GROUPS

By using the [See groups] button, we can administer the groups to which the users belong.



7.4.2.7 HOW TO ADMINISTER THE SYSTEM SKILLS

To work with Skills, you must define first the set of skills at the system level.

In order to administer the system skills, connect to Manager:

1- Access to the Administration | Users menu
2- In the "Users Administration - List" view, select the [See roles] button
3- In the "Users Administration - Skills List" view, you can edit the system skills list.

7.4.2.8 HOW TO ADMINISTER SYSTEM USERS GROUPS

Even if there are predefined users' groups, you can create your own users group. For this, connect to Manager:

1- Access to the Administration | Users menu
2- In the "Users Administration - Lists," select the [See users' groups] button
3- In the "Users Groups Administration - List" view, you can edit the users' groups list

If you access the users group detail, you can establish:

- What users belong to the group
- Administer the assigned roles to the group
- Administer the services participations

7.4.2.9 AGENT RECONNECTION

By using the "Force Reconnection" button, the supervisor can force the agent reconnection (if the said user is an agent).

For example, there are changes that are only activated after disconnecting and reconnecting the agents. Through this functionality, we can do that the agent reconnects as soon as possible.

When the reconnection is forced, what is described below happens:

- If the user is an agent, nothing happens.
- If the agent is not connected, nothing happens.
- If when the agent gets reconnected, the service to which he was connected is still available for him, the agent will connect to the same service.
    - If not, it can be that the agent has been assigned a different service and that this is unique. In this case, the agent will connect to a new service and will be in pause.
    - If the agent has been assigned several services but the one connected is no longer available, the agent will be disconnected with the service selection screen for him to choose one of the services.
- If the agent reconnects to the same service that he was connected before:
    - If at the time of requesting the reconnection, he/she was in pause, he/she will be reconnected and in pause due to the same reason he had to be in pause.
    - If he was performing management tasks per the next service management mode, the agent will remain in pause (Next management mode = Agent) or available (Next management mode=System) In this case the reconnection will occur when the present management task ends.
    - If the agent is available, he/she will reconnect and will be available.
- In any case, the agent is advised of the reconnection through an administrative message.

The agent reconnection can be performed:

- Individually, from the users' administration.
- To a group of agents, from the services users' groups administration.
- To all the services agents, from the services administration.

7.4.3 CAMPAIGNS

Campaigns are either inbound or outbound and they are grouped in services.

The participation opportunities of the users in the Campaigns are assigned indirectly through Services.

7.4.3.1 CAMPAIGN LIST

When selecting the [Campaigns] option from the side menu, the general view of campaigns is shown. From here, the strategy list, DBR connectors and calendars can be opened.

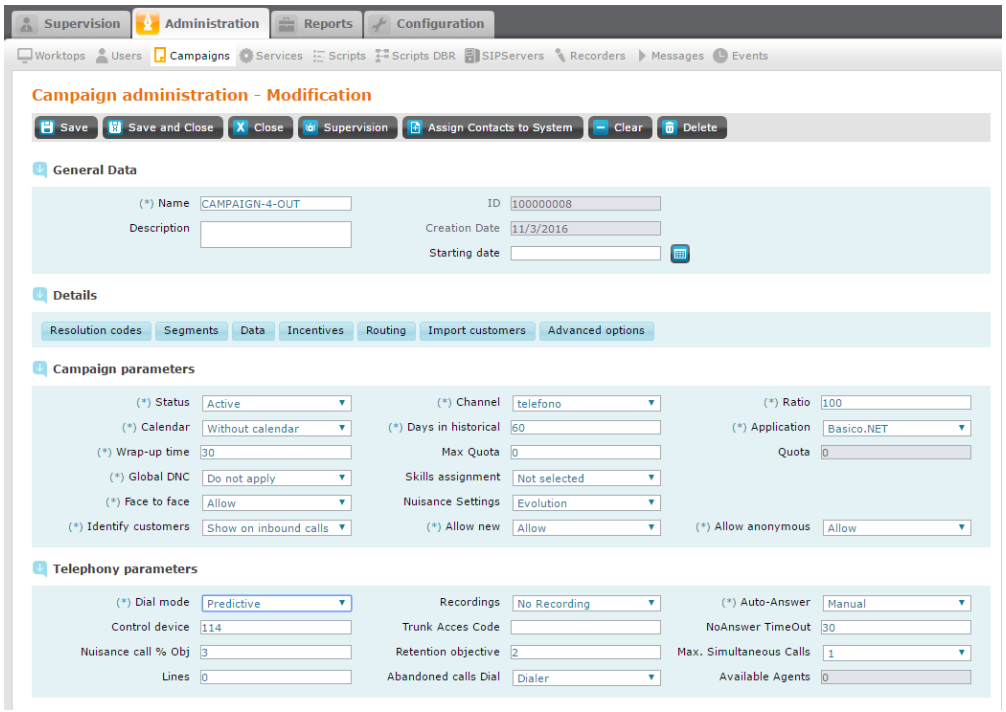
If there are no campaigns registered in the system, the campaign registration view is automatically displayed.

The general view of campaigns displays the following data:

- ID Campaign Identifier.
- Name Campaign name.
- Superv. User assigned to the Campaign supervision.
- Script Script name related to the Campaign.
- Channel Main campaign channel.
- Dial-up Dial-up mode related to the Campaign. For the different modes, see the *"Script Registration"* section.
- Routing Omni+ DBR-Server / Switch-based routing type.
- Dev Control Device (ACD group) assigned to the campaign.
- TAC (Trunk Access Code) Prefix identifying the group of lines to be used for outbound calls.
- AT Reference Administrative Time.
- Weight Campaign weighted value 1...100.
- St Campaign status.

7.4.3.2 CAMPAIGN REGISTRATION

To register a campaign, press [Register a Campaign] in the general campaign view.



The following data must be specified:

PARAMETER	REQ	DESCRIPTION
Name	✓	Campaign name
Description		Additional text to describe the campaign. The maximum size in characters for this fields is of 225.
Start date	✓	Campaign activity start date This value is taken as a default value for the valid start field of the clients uploaded for this campaign. Those whose valid start date goes beyond the present date will not be considered when planning new contacts.
Admin. time	✓	Referential time (in seconds) assigned to the agents to complete management tasks related to the call, starting once the call is disconnected. If the agent goes beyond that time, a notice will generate in the iAgent application.
Maximum quota		Maximum quota for the campaign. When this maximum quota is reached, the campaign goes to the "stopped due to Maximum Quota" status.
Global DNC		'Do not Apply': it is only applied to the DNC list specified in the campaign. 'Apply': it is applied to the campaign and to Global DNC list.
Channel	✓	It admits the following values: 'telephone' 'none'
Quota		Shows the current quota meter (it is not editable).
Days in historical data	✓	Number of days kept in the historical tables containing the information on transactions and contacts made. This value must be over 30 or more, or 0 to indicate the data that required to be stored indefinitely.
Calendar	✓	Campaign activation calendar.
Skills assignments	✓	It allows to assign Skills to outbound campaigns.
LI Adjustments, Annoying	✓	It allows to choose the adjustments of annoying calls.

PARAMETER	REQ	DESCRIPTION
Weight	✓	Campaign weighted value [1...100].
Identify clients	✓	The agent will receive a client identification screen if they do not come previously identified. It admits the following values: 'Do not show screen' 'Show incoming call' 'Show in-person mode' 'Show as incoming and in-person
In-person?	✓	It allows enabling the management registration function in in-person mode. If this is enabled, an agent will generate a new management task "per request," even if there is no call.
Allow anonymous	✓	YES: It allows the agent to go up to the first application screen even without having identified the client or registering a new record. NO: The agent is forced to identify or register the client before proceeding. Linked with Identify Clients.
Allow registrations	✓	YES: the agent will be allowed to register a new client. NO: The agent will be forced to Identify the existing client in the database. Linked with Identify Clients.
Mode	✓	The campaign dial-up mode is determined. It admits the following values: 'Without dial-up' 'Preview' 'Automatic preview' 'Progressive' 'Predictive' 'Without Agent'
Control dev.		(Control device) ACD group assigned to the campaign. It must correspond with the monitored logical device.
Trunk Access Code		(Trunk Access Code) Prefix identifying the group of lines to be used for outbound calls.
Auto-Answer	✓	Auto-Answer mode: 'Manual': The user must pick up manually or through the application. 'Automatic': The application picks up automatically when it receives a call. 'Application': The application picks up automatically once the user data first page is shown.
Recordings		It admits the following values: 'Without Recording': no recordings are allowed. 'Manual': as per agent's request or through the script. 'Integration': through the script. 'Automatic': EvoServer starts and stops the recordings automatically.

When creating a campaign, this will automatically integrate the call dispositions related to the "campaign 0." This campaign can be set up in the database.

7.4.3.3 HOW TO EDIT THE "0 CAMPAIGN" CALL DISPOSITIONS

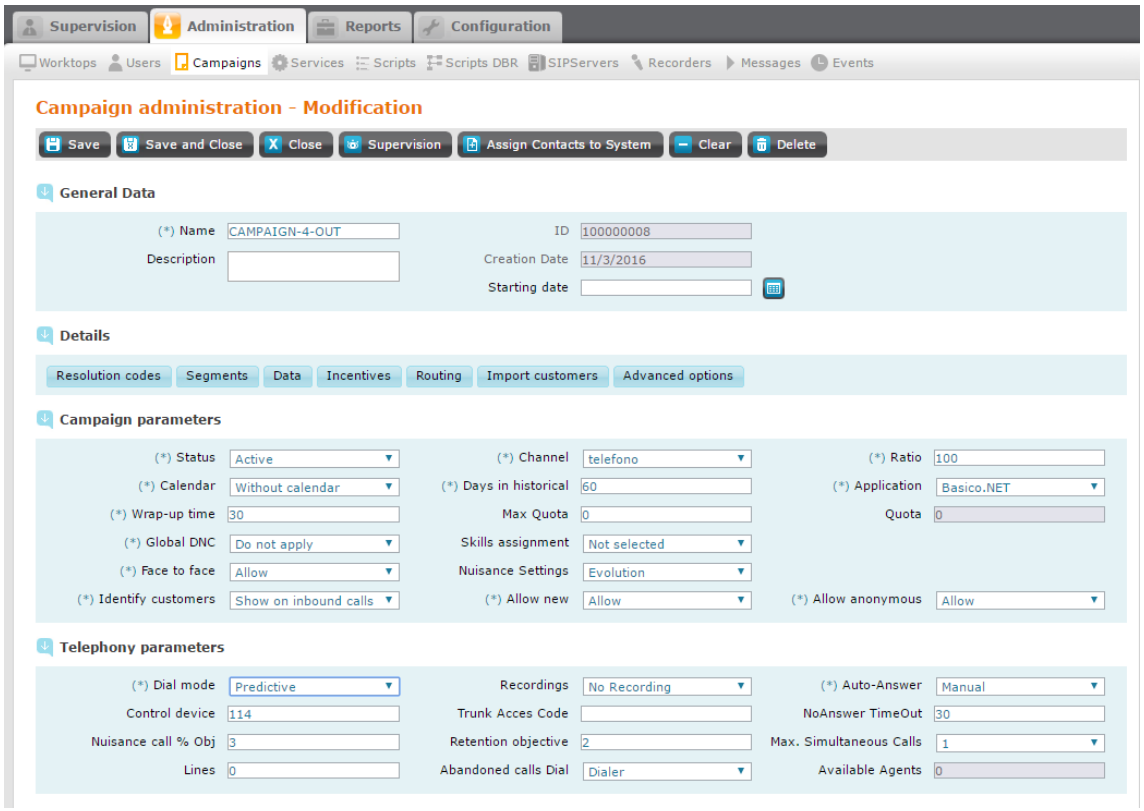
0 campaign is non-editable through Manager, but more call dispositions can be associated through SQL queries in the Omni+ database:

insert into finales
values (0, call disposition code, description, call dispositions class, contacted, Agent callback, minutes, nMaxContacts)

0	numeric(10, 0)	Identify 0 campaign
call disposition code	numeric(10, 0)	New call disposition identifier
Description	varchar(30)	
call disposition class	numeric(1, 0)	0 = "No more calls to the Telephone" 1 = "No more calls to the Record" 2 = "Call in N minutes" 3 = "Agent Callback" 4 = "Pass to Non-callback" 5 = "Call Tomorrow" 6 = "Don't do anything"
Contacted	numeric(1, 0)	0 = No 1 = CU- 2 = CU+
Agent Callback	numeric(1, 0)	0 = Group callback 1 = Agent callback 2 = By default
Minutes	numeric(10, 0)	
nMaxContacts	numeric(10, 0)	
nLocatorManagement	numeric(2, 0)	0= “Current” 1= “Principal” 2= “Next, immediately”

7.4.3.4 CAMPAIGN MODIFICATION

To edit a campaign, select campaign to edit in the campaign list.



The modification view displays the campaign parameters together with several possible actions:

MAIN MENU	DESCRIPTION
Save	Stores changes made in the campaign fields.
Close and save	Stores changes made in the campaign fields and goes back to the page from where the campaign modification came (generally from the campaign list).
Close	Goes back to the page from where the campaign modification came (generally from the campaign list) but does not store the changes made in the campaign fields.
Real-time Supervision	Goes to the supervision page of this campaign.
Assign contacts to System	Allows reassigning all records assigned to agents.
Clean	Executes cleaning process, eliminating all call information history and transactions made in that campaign. Additionally, it eliminates the client list and all other additional client data. It does not eliminate the campaign configuration.
Delete	It performs the same operation as in the previous case, but also eliminates the campaign from the configuration. The campaign is completely deleted and restoring is impossible.

DETAILS MENU	DESCRIPTION
Call dispositions	Navigate to this campaign's call dispositions management. Further information in the section: Management of call dispositions and Groups of call dispositions.

Segments	Navigates to this campaign's segments management. Further information in the section: Segments.
Data	Data allocation to the campaign, in pairs key/value. This data can be used by the script or application.
Incentives	Navigates to this campaign's incentives management.
Routing	Navigates to this campaign's routing configuration.
Import Clients	It accesses the client registration import page.
Advanced Options	Configuration of additional parameters.

CAMPAIGN PARAMETERS	DESCRIPTION
Status	Campaign status: 'Active': campaign ready to run. 'Inactive': campaign on hold. 'Maximum quota': automatic, upon surpassing the quota established. 'Off-calendar': automatic, if it has an assigned calendar and

DIALER PARAMETERS	DESCRIPTION
Mode	Dial-up mode: 'No dial-up': no outbound calls are made. 'Preview': outbound calls in Preview mode. 'Automatic preview': outbound calls in Automatic Preview mode. 'Progressive': automatic progressive dial-up system. 'Predictive': automatic predictive dial-up system. 'Agentless': automatic agentless dial-up system.
NoAnswer timeout *(predictive, progressive, agentless)*	Maximum time in seconds the dial-up module awaits before applying a NO ANSWER call disposition.
Abandoned dial-up *(predictive, progressive)*	Dial-up mode applicable to those records that have already been treated and whose call disposition has been 'Abandoned': 'Dialer': no special treatment. 'Preview': deliverable to agents in Preview. 'Automatic preview': deliverable in Automatic Preview.
Obj. % annoying *(predictive)*	Units: percentage above a hundred. Objective for the number of annoying calls to regulate the dialer behavior. By default, 3%.
Obj. retention *(predictive)*	In seconds. Objective for the retention time to regulate the dialer behavior. By default=2 s.
Max. simultaneous calls *(predictive, progressive)*	Limits the max. number of simultaneous calls per request. For example: Max. simultaneous calls=2, maximum 2 calls will begin per each new call needed.
Lines *(predictive, progressive, agentless)*	*Predictive/Progressive: max. number of telephone lines of the dialer allocated to this campaign.* *Agentless: max. number of simultaneous agentless calls. If your value is 0, the number of licenses is taken into account.*
Free agents *(preview)*	Number of agents who must be free before the dialer makes calls. This value can be zero.

7.4.3.4.1 HOW TO FILTER ANSWERING MACHINES

To avoid passing answering machines to agents, you just need to set-up "no answer timeout" to a lower value than the regular amount of time the answering machine takes to go off. We suggest setting up to 20 seconds. This way, answering machines will be filtered in practice.

> Note: If agents receive many calls with "answering machines," their productivity decreases significantly because most call centers do not leave messages, so their calls must be callback.

7.4.3.4.2 MINIMUM NUMBER OF AGENTS

If the predictive dial-up mode is used with a very small number of agents, statistics-based predictions are not as reliable and the number of abandoned calls or other cases affecting the platform performance can increase.

To avoid this effect, define a "Minimum number of agents per campaign to start predicting" parameter in Omni+/Admin:

Minimum number of agents per campaign to start predicting	If you cannot reach the minimum number of agents, the dial-up manager will not start calls anticipating the management ending; calls are then made in the progressive mode. Additionally, only one simultaneous call will be started. When the number of agents surpasses the threshold, predictive dial-up will start. For example: 5.

7.4.3.4.3 MANAGEMENT DURATION LIMITS

Very short or very long duration managements distort statistics and negatively affect the predictive dial-up performance.

For example, very short calls would cause the median call duration to artificially fall. Therefore, two parameters are defined in Omni+/Admin to allow for the definition of the interval "normal" of management durations.

- "Minimum management duration for statistical input"
- "Maximum management duration for statistical input"

Management whose duration is below or above these values will not be taken into account for statistical calculations.

> The “minimum duration” value should be placed above the duration of the “short calls” (e.g.: calls lasting only 5-10 seconds; calls to wrong numbers, etc.),” to avoid affecting statistics.
>
> For example: 30 seconds

With these parameters, we also eliminate the statistical effect of those managements of extremely long duration which are not representative.

If a management lasts longer than as established in the "Maximum management duration for statistical input," the prediction mechanism is also inhibited, and the module stops making calls for this agent.

Endingly, when the management finishes and the agent becomes available, the next call will be in the progressive mode.

> This mechanism prevents the system to continue trying new calls indefinitely because of unusually long duration managements

7.4.3.5 REAL-TIME CHANGES IN CAMPAIGN PARAMETERS

Real-time changes in the following campaign parameters can be made:

- Dial-up mode
- Campaign weight
- Campaign status
- List priority
- Segment status
- Calendar

Value changes will take place in a maximum period of one minute, coinciding with the transition to available of each one of the agents.

7.4.3.6 RECORD CACHE DATA

The option [Cache] allows setting up the parameters of the list cache of Omni+/server.

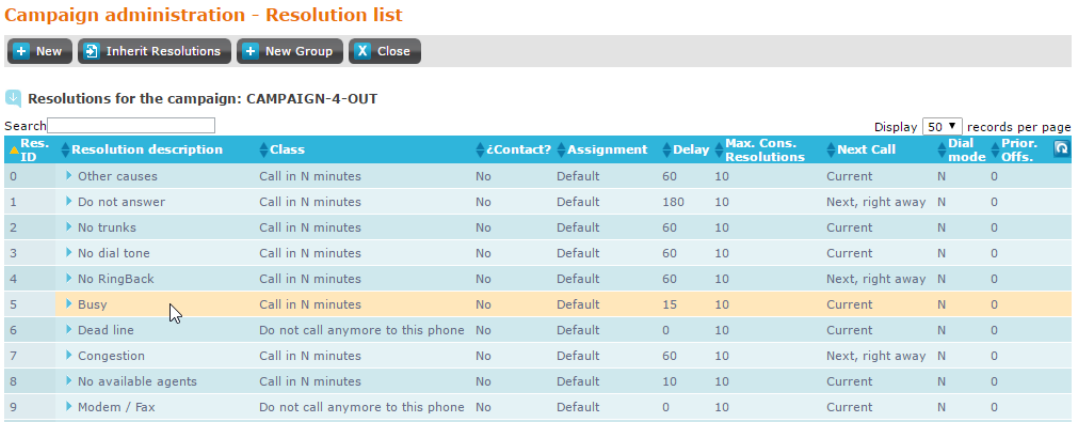
These values affect the platform performance and their correct selection reduced the CPU requirements of the lists manager.

Cache parameters are:

PARAMETER	REQ	DESCRIPTION
Cache size	✓	“HIGH WATER MARK” Number of calls to make which the dialer keeps in the local cache. As calls are made, they are removed from the cache. When its size falls below the specified value in "minimum cache size," the list is refreshed with new calls taken from the data base. See "Record Cache"
minimum cache size	✓	“LOW WATER MARK” Number of calls below which the dialer refreshes the calls to be made, until the number of calls specified in "cache size" is reached. See "Record Cache"

7.4.3.7 MANAGEMENT OF CALL DISPOSITIONS CODES AND CALL DISPOSITIONS GROUPS

With the call dispositions registration/modification view is accessed:



Res. ID	Resolution description	Class	¿Contact?	Assignment	Delay	Max. Cons. Resolutions	Next Call	Dial mode	Prior. Offs.
0	Other causes	Call in N minutes	No	Default	60	10	Current	N	0
1	Do not answer	Call in N minutes	No	Default	180	10	Next, right away	N	0
2	No trunks	Call in N minutes	No	Default	60	10	Current	N	0
3	No dial tone	Call in N minutes	No	Default	60	10	Current	N	0
4	No RingBack	Call in N minutes	No	Default	60	10	Next, right away	N	0
5	Busy	Call in N minutes	No	Default	15	10	Current	N	0
6	Dead line	Do not call anymore to this phone	No	Default	0	10	Current	N	0
7	Congestion	Call in N minutes	No	Default	60	10	Next, right away	N	0
8	No available agents	Call in N minutes	No	Default	10	10	Current	N	0
9	Modem / Fax	Do not call anymore to this phone	No	Default	0	10	Current	N	0

Lists of groups and call dispositions.

The following action can be performed:

- New Call disposition Code
- Legacy Call disposition Code (from another campaign) It allows selecting from which campaign the call dispositions code will be copied.
- New Group (of call dispositions Code): allows introducing a description of the group and linking the call dispositions code comprised.
- Select a call dispositions code (to edit its parameters): Double-click on the list.

The data necessary to define an ending are:

PARAMETER	DESCRIPTION
Code	Numeric code identifying the call disposition of the business we expect to create. The codes defined by the user must have a ≥100 code.
Description	Short description of 30 characters max.
Call dispositions type	One of the following: **“No more calls to the Telephone"**: Deregisters the current telephone, and if it's the last active telephone, it will deregister the contact. **"No more calls to the Record"**: The contact is not callback, and no more calls are made unless reimported. The contact remains in STATUS=FINALIZED. **“Call in N minutes"**: The contact is replanned for a callback in N minutes from the current time. The contact goes to the SYSTEM CALLBACK LIST[3]

[3] Unless it is in the AGENT CALLBACK list and the ending is of a NOT CONTACTED type. In this case, the AGENT CALLBACK list is followed.

PARAMETER	DESCRIPTION
	"Agent Callback": The contact is replanned to be called in N minutes or on the date/time specified by the agent. The contact goes to the AGENT CALLBACK LIST. **"Pass to Non-callback"**: Client is replanned for callback but with no fixed date nor hour in the NON CALLBACK list. **"Call Tomorrow"**: Callback tomorrow, at the current time. **"Do nothing"**: No action is made with the record.
Contacted	One of the following: **"NC"**: client has not been contacted. **"SC-"**: Negative useful contact. The client has been contacted but it is not considered useful. **"SC+"**: Positive useful contact. The client has been contacted and it is considered useful. **"NSC"**: Non-useful contact. A person has been contacted but it is not considered a useful contact (for example, because we have not been able to speak to the person we wanted to). Considering a contact positive or negative depends on the business rules. For example, in a tele-sale campaign only those call dispositions which imply the effective sale of the product are considered useful.
Registry allocation	**"To the agent"**: callback is allocated to the same user executing the call disposition. **"To the group"**: allocated to any agent available. **"By default"**: allocated to whoever is currently allocated.
Minutes	If the final is of the "Call in N number of minutes" or "No more calls to the telephone" type, specify the number of minutes to call the client back. In the case of "No more calls to the telephone" as long as the client has alternative telephones on the database. For a call disposition of the "Agent Callback" class, specify the number of minutes to call back within the "punctuality interval," unless specified 0, in which case the punctuality interval behavior is deactivated.
Max. Number of Consecutive Call dispositions	If a greater consecutive call dispositions sequence of the same type occurs, the contact goes to a SYSTEM DEREGISTRATION status. In case of zero (0) value, it is not considered.
In the following call, use the telephone.	One of the following: **"Current"**: the next call will be programmed to the same telephone which caused this call disposition. **"Main"**: the next call will be programmed to the main telephone in the alternative telephones list. **"Next, immediately"**: the next call will be made to the next telephone in the alternative telephones list immediately, disregarding all other call disposition rules until the whole list has been covered or any of the calls changes the call disposition.

7.4.3.8 SEGMENTS

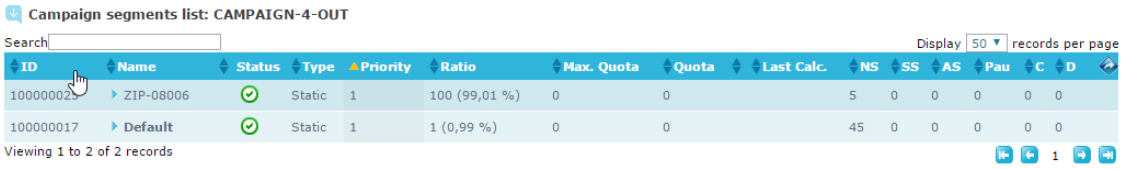
The campaign segments list displays both dynamic and static segments, ordered by priority, status and weight.

Active and passive record meters of each segment are shown. In the case of dynamic segments, as these can vary over time, meters are recalculated on a periodic basis. The time elapsed from the last update is shown.

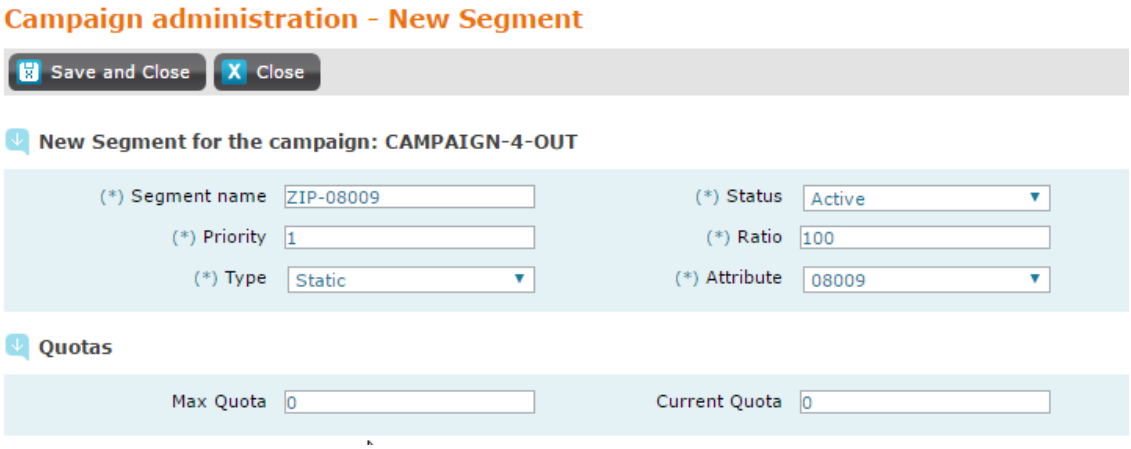
There are options to recalculate a particular segment of all of them.

Note: unless all segments are recalculated, by default the system periodically recalculates the number of active and passive records of the segments of those campaigns **with agents** who are **not on hold**.

From this view, you can add/modify segments.



7.4.3.8.1 SEGMENT REGISTRATION/MODIFICATION

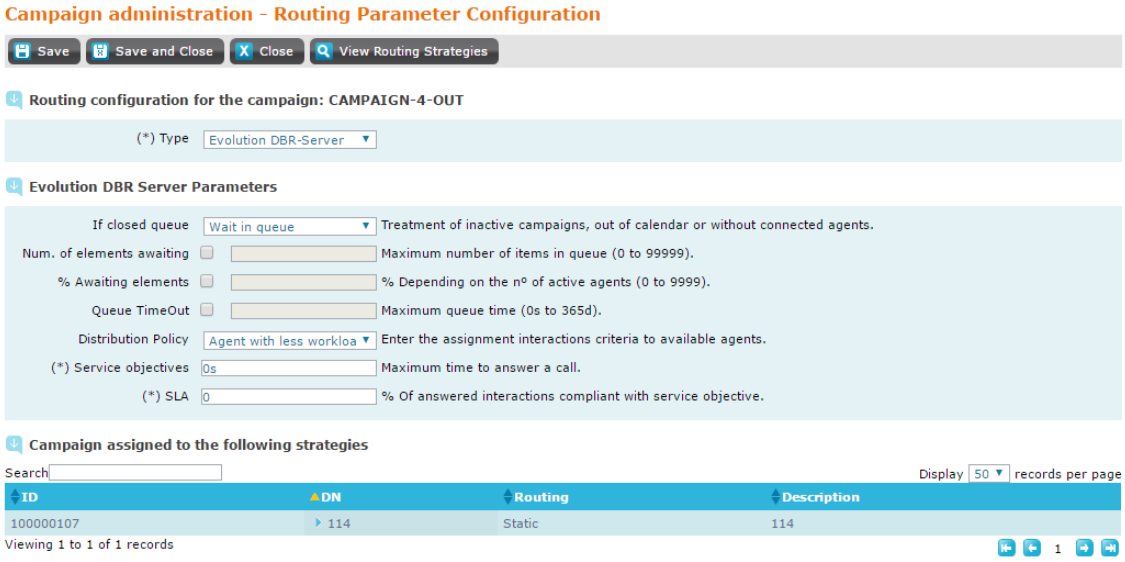


When a new segment is created, the following data must be provided:

- Name of the segment
- Priority {1...100}
- Type: static/dynamic
- Status {active/paused}
- Weight: {1...100}
- Attribute (only for static segments): Value of the characterizing attribute. This value will be chosen from the "available values" list.
- Inquiries (only for dynamic segments): SQL expression.
- Maximum quota: Maximum quota for the campaign. When this maximum quota is reached, the segment goes to the "stopped due to Maximum Quota" status.
- Current quota: Shows the current quota meter.

7.4.3.9 ROUTING

A campaign queue can be managed with the switch or through a Dynamic Business Router (DBR). This last option will provide more call routing power and better supervision of your call center.



Queue configuration parameters:

- **Queue management:** Switch-based or Omni+ DBR-Server

The configurable parameters of a DBR queue are:

- **If queue closed:**
  - Admit on hold: it will accept campaign queue elements, even if the queue is closes (the campaign is inactive, off-calendar, there are no agents connected or they do not have enough skills).
  - Divert according to strategy: when the queue is closed, it will divert calls as per strategy configuration.
- **Number of elements on hold**: it allows specifying how many elements there can be in a queue. If this number is exceeded, calls will be diverted as per strategy configuration. This call transaction will close with the call disposition "Queue Closed." If the box is unchecked, the number of elements will not be limited.
- **% elements on hold**: it allows specifying a percentage over the number of active agents (who are not in "Not available" status) to establish the maximum number of elements on hold. If this number is exceeded, calls will be diverted as per strategy configuration. This call transaction will close with the call disposition "Queue Closed." If the box is unchecked, the number of elements will not be limited.

  For example: with a value of 200 and 50 active agents, the number of elements which will be accepted will be 100 (50 * 200% = 50 * 200 / 100 = 100).

  If any of the two parameters vary (number of elements on hold or % of elements on hold), elements already in queue will not be affected. For example, if the number of elements on hold was 20 and goes to 10, those 20 elements remain in queue, and no more calls will be accepted until that number is smaller or equal to 10.

- **Queue timeout**: it allows specifying the maximum number of seconds a call can be on hold. After the time limit, the call will be deviated to the queue/extension specified in the corresponding

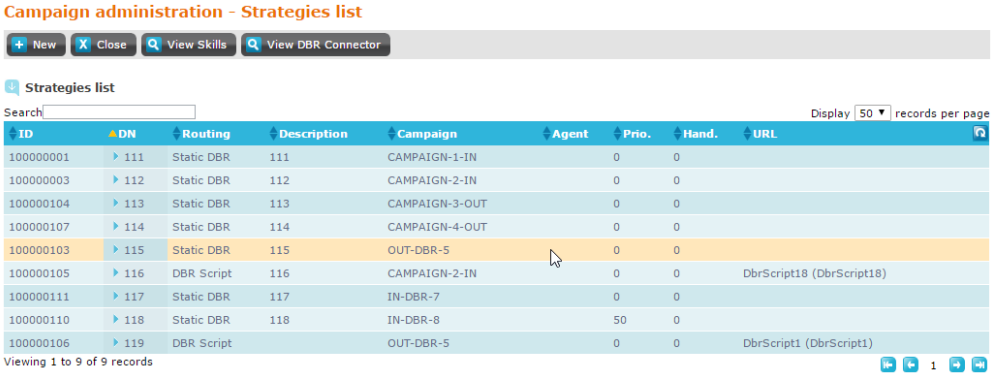
strategy. This call transaction will close with the call disposition "Queue Saturated." If the box is unchecked, the time in queue will not be limited.
Time must be expressed in the following way: Ad Bh Cm Ds.
Where, Ad: A days, Bh: B hours, Cm C minutes and Ds: D seconds, with A, B, C, D positive numbers, not necessary to include all elements.
Examples: 1m 30s, 2h, 1d 12h,...

- **Distribution policy:** allows specifying the calls distribution policy in case of several available agents. There are currently three policies available: less active agent, more skilled agent, less skilled agent
- **Service objective:** allows specifying the maximum queued interactions time out before being answered. Time must be introduced in the Queue Timeout.
- **SLA (Service Level Agreement):** the minimum interaction percentage for which the service objective must be met.

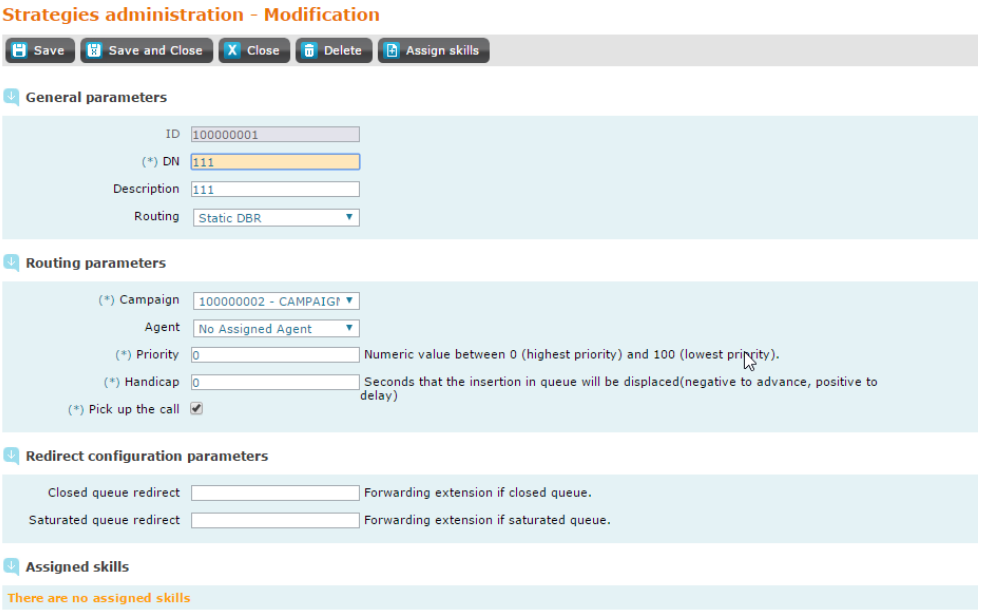
Additionally, from this tag it is possible to access the strategy edition [see strategies].

7.4.3.10 CAMPAIGN ROUTING STRATEGY EDITION

This option allows accessing the list of all strategies defined in Omni+.



Clicking on the DN field of one of them, we can edit or delete it. Clicking on the button [New], we can add a new strategy.



A new strategy is characterized by being associated to a DN.

The strategy can be of the following types:

- Static DBR: the strategy characteristics are established a priori and applied to all strategy calls.
- Dynamic DBR: strategy characteristics are obtained through a Web Service. Therefore, parameters are dynamic and can be different for each call depending on the business logics implemented in the Web Service.
- DBR script: strategy characteristics are obtained through a DBR script. Therefore, parameters are dynamic and can be different for each call depending on the business logics implemented in the DBR script.
- DNIS: Switched-based routing strategy type. It only requires establishing a campaign associated to DNIS. Multiple DNIS can be configured for the same campaign.

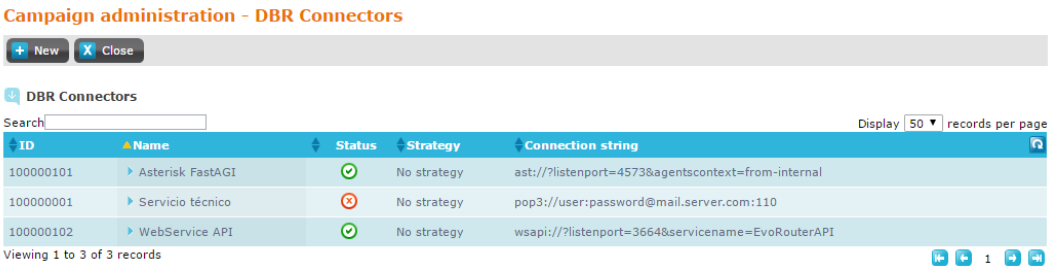
In a DBR strategy, the DN can represent a route point or a DNIS, depending on the Omni+ DBR configuration. In the first case, the strategy will be applied if the call fails in the route point specified and, in the second, if the call has been made to the DNIS specified.

Wildcards '?' and '* can be also used to allocate DN ranges for the same strategy. Wildcards '?' and '* can be also used to allocate DN ranges for the same strategy. It is also possible to allocate various DNIS strategies for the same campaign.

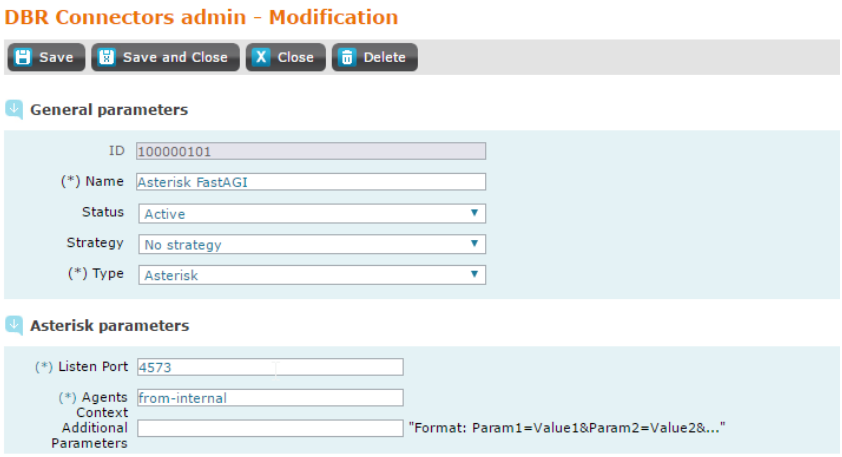
Additionally, from this tag it is possible to access the DBR connectors edition [see DBR connectors].

7.4.3.11 DBR CONNECTORS EDITION

This option allows accessing the list of all DBR connectors defined in Omni+.



Clicking on the Name field of one of them, we can edit or delete it. Clicking on the button [New], we can add a new DBR connector.



A DBR connector acts as a gateway between another system and Omni+.

Depending on the strategy chosen, the contacts generated in the remote system are queued in the DBR module to be treated in Omni+.

The connector status can be active or inactive.

Depending on the connector type, we will see the different configuration parameters.

When “Defined by user" is indicated, state DBR connector URL, which is a connection chain to the external system. The URL's generic specification is:

Protocol://[UserInfo@][[Host]:[Port]][/[Ruta][?[[Param1]=[Value1]][&[Param2]=[Value2]]…]]

pop3://soporte:123!@test.com

The URL's specification depends on the protocol used by the connector. Consult the Installation Manual for the different connector parameters.

Additional parameters allow including extra parameters with the format:

Param1=Value1&Param2=Value2&…

7.4.3.12 CAMPAIGN DATA

Omni+ allows the association of a series of static data to a campaign. This data can be consulted or used by the script or application. This characteristic allows an application parametrization plow with no need for design modification or regeneration.

The available actions are:

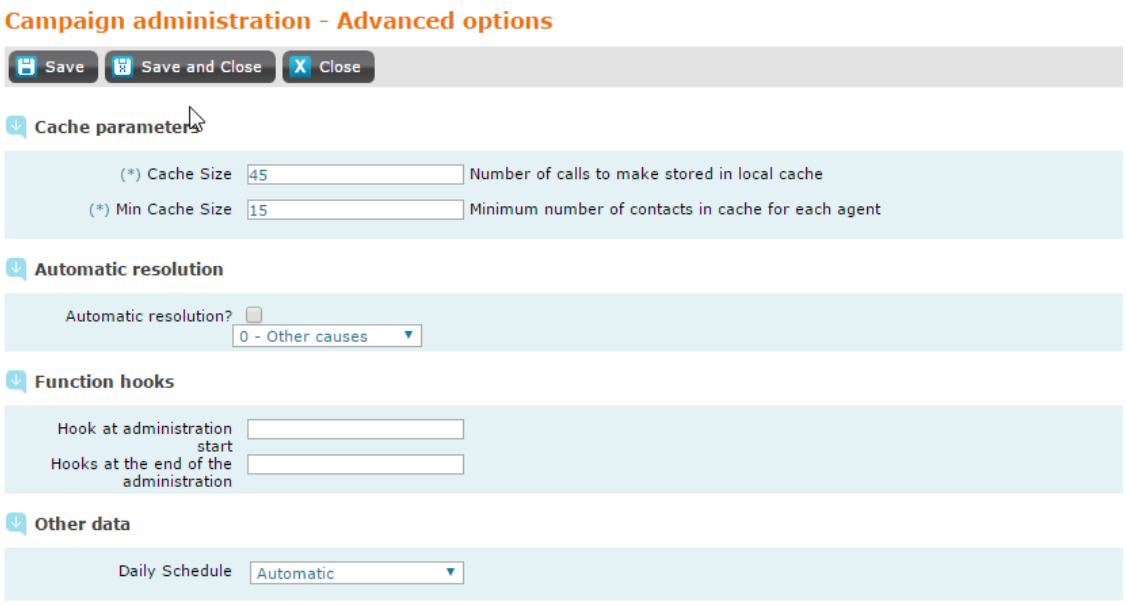
- Define a new pair of Data/Value.
- Edit/delete data.

A typical usage scenario is when the same script is used in multiple campaigns, each one defining a specific set of "campaign data." Thus, campaign data allow: customizing screens and questions, answers, e-mail headers, online application/script parametrization, etc.

7.4.3.13 ADVANCED OPTIONS

The following options can be set up:

- Cache parameters.
- Automatic call dispositions.
- Function hooks.
- Other data.



7.4.3.13.1 CACHE PARAMETERS

Number of contacts to be cached by agent.

7.4.3.13.2 AUTOMATIC CALL DISPOSITIONS

A campaign can be set up to force an automatic call disposition when the maximum management time is over.

This way, when the call is interrupted, the management time will start normally. But when the latter reaches the maximum set up value, management will be closed immediately with the call disposition set up.

If the campaign has an agent script configuration, this will lose the non-stored data.

7.4.3.13.3 FUNCTION HOOKS

With hooks, the execution of customized actions is possible at the start and end of each agent management. It is necessary to report the Hooks section for functions indicating the URL of the javascript files (.js) that iAgent will execute at the start and end of each management.

7.4.3.13.4 DAILY PLANNING

Action executed for those records which, due to replanning, are not within the interval call_from/call_until.

'Automatic': The record adjusts to fit the next day's interval. The records coming from the list Agent callback are an exception to this rule, and the call back time is kept, passing to the next day's record.

'Manual': The record goes to 102: SYSTEM-DEREGISTRATION.

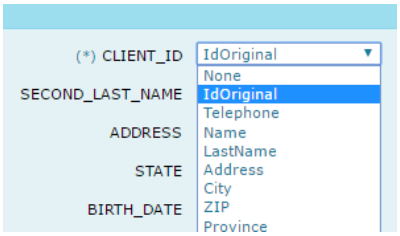
'To call from': It goes to the next day's CALL_FROM interval.

Only applicable to outbound campaigns.

7.4.3.14 CLIENT RECORD IMPORT AND UPLOAD

The page [IMPORT client] can be accessed from a campaign's detail view. This screen displays all tables available in the ODBC data origin "DATA" set up in the system.

Once an Access database table has been selected, the application will show a field list of Omni+'s field model, which should be associated to the available fields in the table to import.



There are several mandatory fields, indicated in red code. The rest of the fields are optional.

Once the association has been performed, click [Start Import].

After requesting confirmation, the system will start the import process.

The import process comprises two stages:

- Data transfer from the Access table to the intermediate tables Import_Clients and Import_Locators.
- Server execution process to import clients to the campaign lists.

Once the process is completed, the result can be verified through the main option "events."

If the option Use Alternative Telephones is activated, various telephones can be imported and the first will be mandatory instead of the Telephone in the upper section.

If the option Additional Client Data is activated, additional data can be uploaded.

7.4.3.14.1 HOW TO IMPORT RECORDS FROM MYSQL

Once the MySQL's ODBC connector has been installed, the ODBC DSN "DATA" must point to the database we want to import.

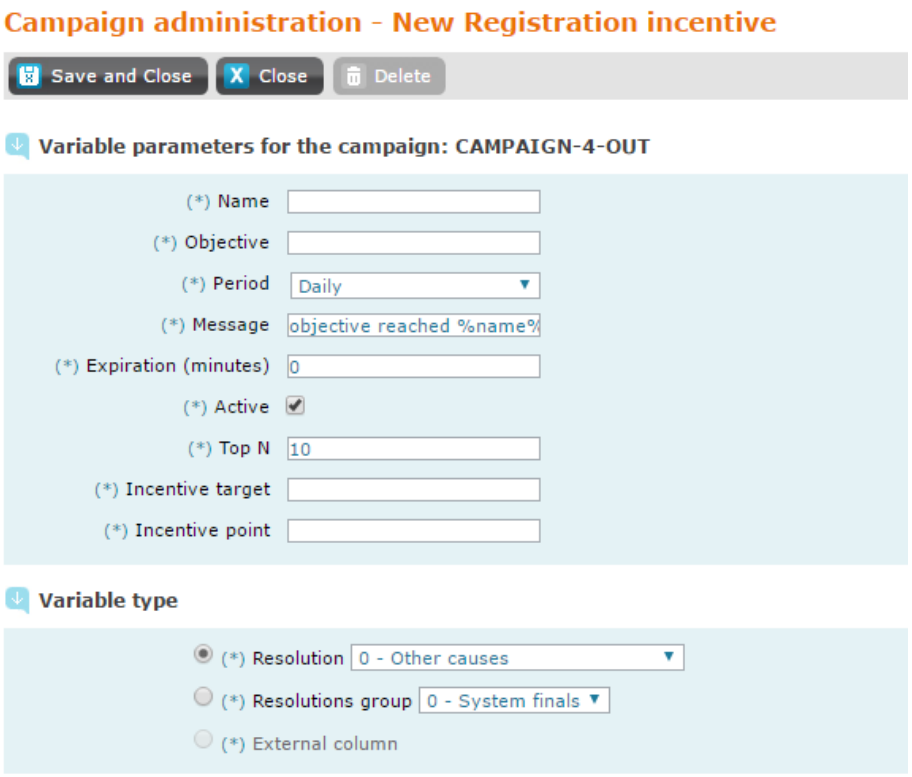
MySQL must have the ANSI_QUOTES option activated, and the ID and Telephone corresponding fields must be text.

7.4.3.15 INCENTIVE ADMINISTRATION

An administrator user can define an arbitrary number of "VARIABLES" to measure. These variables are based on the call dispositions information generated by the Omni+ platform, and can be of the following types:

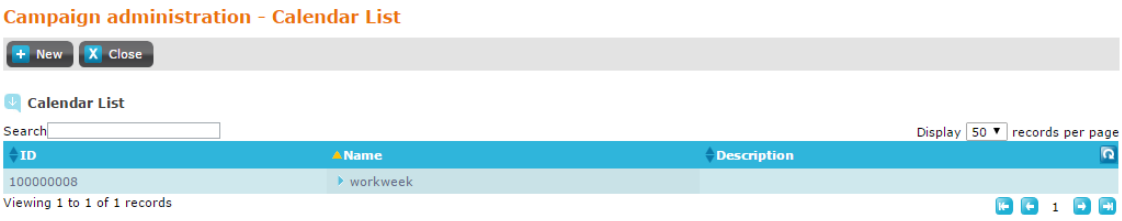
- Number of times a concrete call disposition has been run.

- Number of times a call disposition from a GROUP OF CALL DISPOSITIONS has been run.

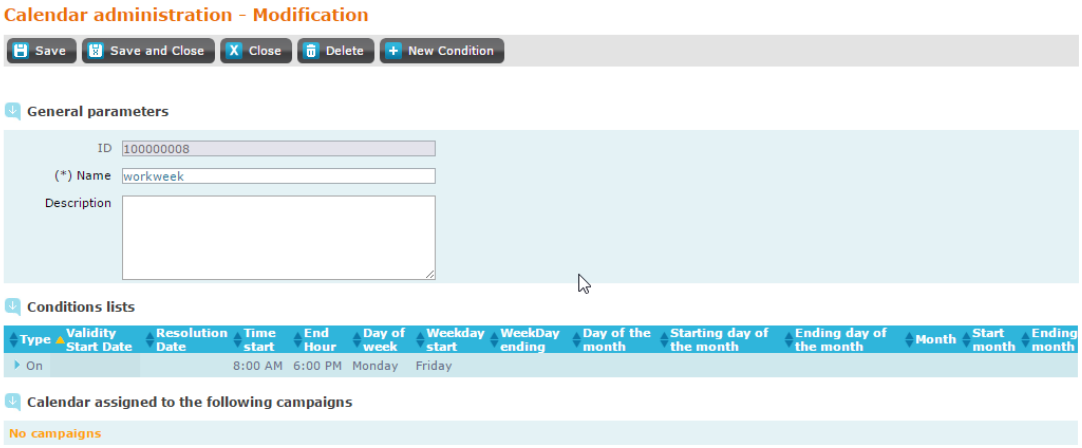


7.4.3.16 CALENDAR EDITION

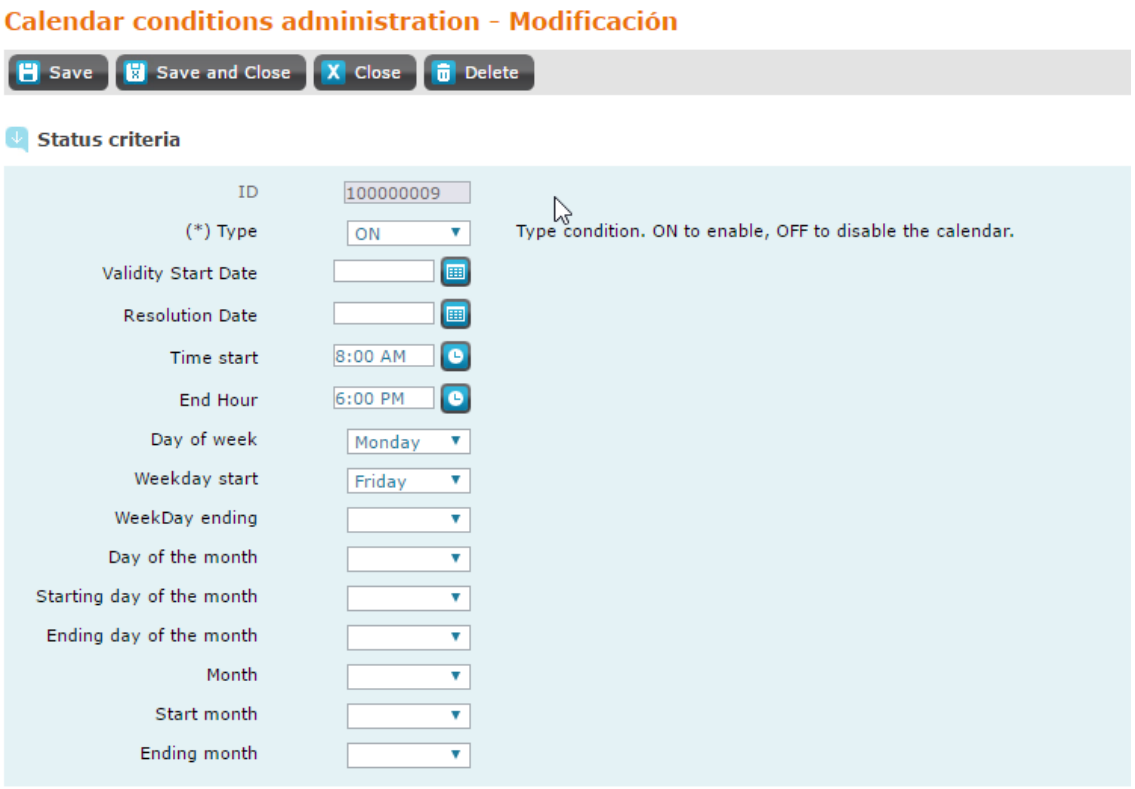
Each calendar can be edited from the calendar list by clicking on the name or a new calendar can be created by clicking on 'New':



A calendar must have a unique name (which can be seen in the drop-down menu of the calendar selection in the campaign) and an optional description.
In addition, to be useful it should include a temporary conditions list, each one to be evaluated as true or false against the real time instant.



New conditions can be created by clicking on "New condition," or an existing condition can be edited clicking on the Type of condition selected:



The type of condition is used to establish the calendar status.

For each condition, the following criteria can be selected:

CRITERION	MET IF THE CURRENT INSTANT IS...
Start date	The same or greater
End date	The same or lower
Start time	The same or greater
End time	Lower
Day of the week	The same
Starting day of the week	The same or greater
Ending day of the week	The same or lower
Day of the month	The same
Starting day of the month	The same or greater

Ending day of the month	The same or lower
Month	The same
Starting month	The same or greater
Ending month	The same or lower

For the condition to be met, all criteria established should be met, and in such case the ON or OFF condition will be active.

A calendar will be ON/OFF according to the temporary conditions list applying the following rules:

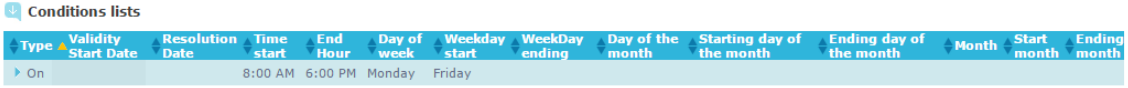
- If there is no condition, the calendar is OFF.
- If there is an OFF condition established for now, the calendar is OFF.
- If there is no ON condition established for now, the calendar is OFF.
- If there is an ON condition established for now (and there is no OFF condition established for now), the calendar is ON.

If a campaign is active and has no assigned calendar, Omni+ will automatically change the status according to the calendar status:

Calendar	Campaign
ON	Active
OFF	Off-calendar

If the campaign status is 'Maximum quota' or 'Inactive' status, Omni+ will not evaluate the calendar and there will be no changes in the campaign status.

For example, with the following conditions:



The calendar will be ON: from Monday to Thursday, from 9:00 to 14:00 and from 15:30 to 19:00 ; and Friday, from 9:00 to 15:00. Except on January 1, May 1, and December 25.
It will be OFF the rest of the time and on the days indicated.

> On the calendar modification page, the delete option will not be activated if there is a campaign which has this calendar assigned. The list of campaigns which have it assigned can be seen at the bottom of that page.

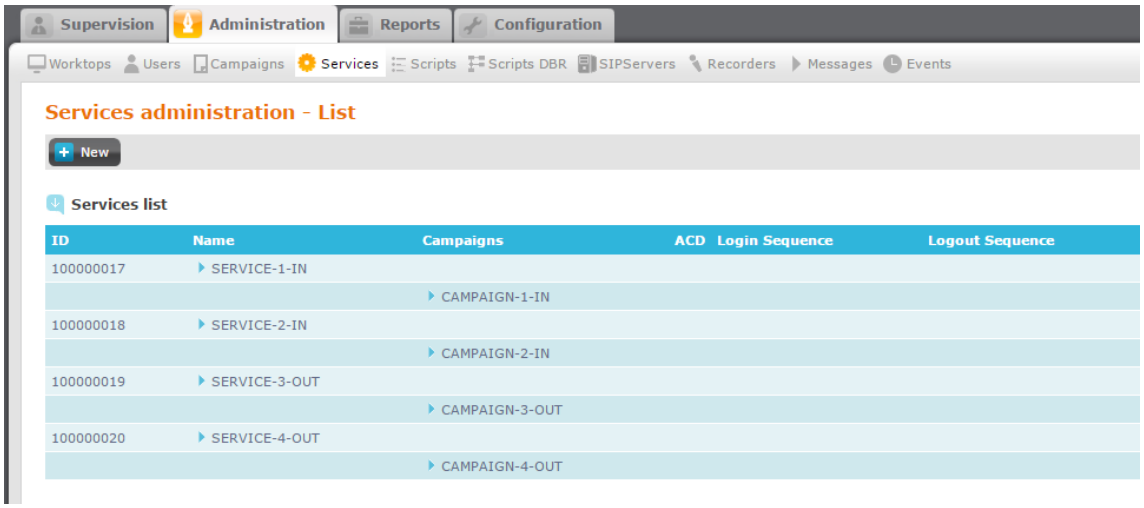
7.4.4 SERVICES

To access the service management, click on the sub option management Services, in the top menu.

If there are no registered services, the service registration view would immediately pop up.

The available actions are:

- Create a New Service.
- Modify the definition of an existing service by clicking on the service.
- Access a campaign detail view by clicking on the campaign.

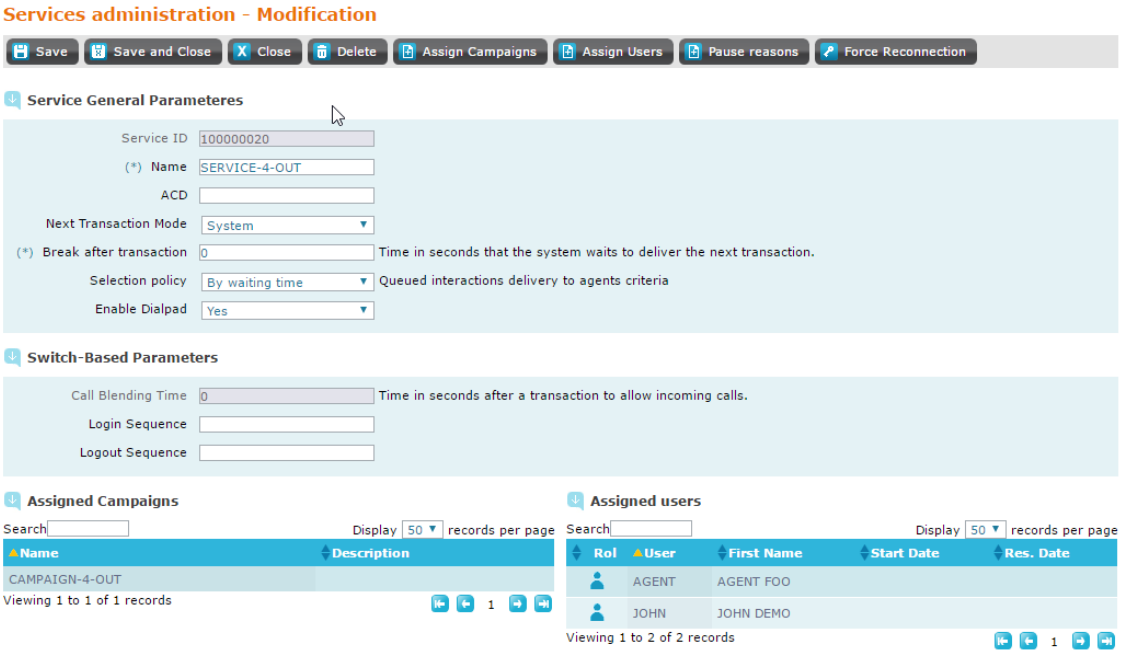


7.4.4.1 SERVICE REGISTRATION/MODIFICATION

The service registration/modification view allows:

Name	Service name.
ACD	ACD Group if the service requires a switch-based ACD queue.
Next management task mode	Specifies if the next management task is required by the agent or provided by the system automatically.
Pause after management task	Time in seconds that the system will wait after the agent has finished a management task to be delivered the following. Only applies when the Next management task mode is System.
Selection policy	Criterion to select the queue from which the next interaction to be delivered will be extracted, when they have the same priority. ○ As per time in queue: the one with the longest time in queue, considering handicap. ○ As per service objective: the interaction closest to non-compliance of the service objective marked in the campaign.
Enable telephone keyboard	Allows controlling that the agents are able to make free calls, enabling or disabling the iAgent's telephone keyboard. ○ Yes: always enabled ○ No: always unable ○ Only in management task: only when the agent is doing a management task will the keyboard be enabled.
CallBlending time	Time in seconds after a management task to allow incoming calls.

Connection/disconnection sequence	Set up connection/disconnection sequences These sequences allow invoking ACD functions. See "connection/disconnection sequences"
Assigned campaigns	Service campaigns list Can be managed with the button [Assign Campaigns]
Assigned users	List of users or user groups assigned to the service Can be managed with the button [Assign Participations]
Pause reasons	With the button [Pause reasons], available agents' pause reasons for this service can be edited.
Force reconnection	Forces the reconnection of all service agents connected at the moment.



ACD is a mandatory value if the service contains a campaign requiring a switch-based ACD queue. Nevertheless, some telephone private branch exchanges do not require the ACD group specification when logging in. If the "service name" carries the prefix "#," a void ACD group will be sent instead of the service name. For example:

#<ACD GROUP>

If it were necessary to define an ACD group containing the character #, the following escape sequence will be used: For example, if the telephone private branch exchange has an ACD group defined as "#328," the following service name will be set up:

##328

When assigning user participation opportunities, the final participation date will be automatically informed as that of the campaign ending.

7.4.4.2 HOW TO REGISTER A SERVICE

From Manager, access Administration | Services and click on the button [New].

Inform the service name and set up, if necessary, the "ACD" parameter, the "Next management task" mode and save with [Save and close].

In "Assign service campaigns" add the campaigns comprising the service and [close].

[Assign participations] and add the agents to be delivered participation opportunities. If desired, participation start, and end dates can be edited.

7.4.4.3 HOW TO ASSIGN SERVICE CAMPAIGNS

From Manager, access Administration | Services

1- In "Services Administration - List," select the service to edit.
2- In the “Services Administration - Modification” click on the [Assign campaigns] button.
3- In the “Services Administration - Campaign Assignments” view, you can add/remove service campaigns.

7.4.4.4 HOW TO ASSIGN USER-SERVICE CAMPAIGNS TO A SERVICE

From Manager, access Administration | Services

1- In "Services Administration - List," select the service to edit.
2- In “Services Administration - Modification” click on the [Assign participations] button.
3- In the “Services Administration - Participation Assignment” view, add/remove user participations and/or user groups.

7.4.4.5 HOW TO EDIT SERVICE PAUSE REASONS

Once a service has been created, it is possible to access the service pause reasons established for the service by clicking on [Pause reasons].

The registration/modification of pause reasons view allows defining the following parameters:

Code	Identifier of 4 characters max. for pause reasons.
Description	Description of pause reason.
Switch code	ReasonCode to be passed to the telephone exchange as pause reason.

Only pause reasons defined by the user can be edited. System pause reasons cannot be modified from the Manager interface.

7.4.4.6 ABOUT CONNECTION/DISCONNECTION SEQUENCES

Omni+ can send digit sequences, which in some telephone private branch exchanges allow activating certain functions.

These connection and disconnection sequences send digits to the ACD after LOGIN and before LOGOUT, respectively.

Various sequences can connect, separating them with ";" (semi-colon)

The following macros are allowed in the sequences:

- <LOGINACD> - agent's acd login
- <DN> - telephone
- <POSID> ancillary telephone

The frequent use of connection and disconnection sequences is to operate an inbound service with various blending campaigns. In this case, sequences forcing "login" and "logout," respectively, are sent from the different ACD queues.

Connection and disconnection sequences are switch-based. See the Omni+ installation manual to find more information on sequences for each type of telephone switch.

7.4.5 SCRIPTS

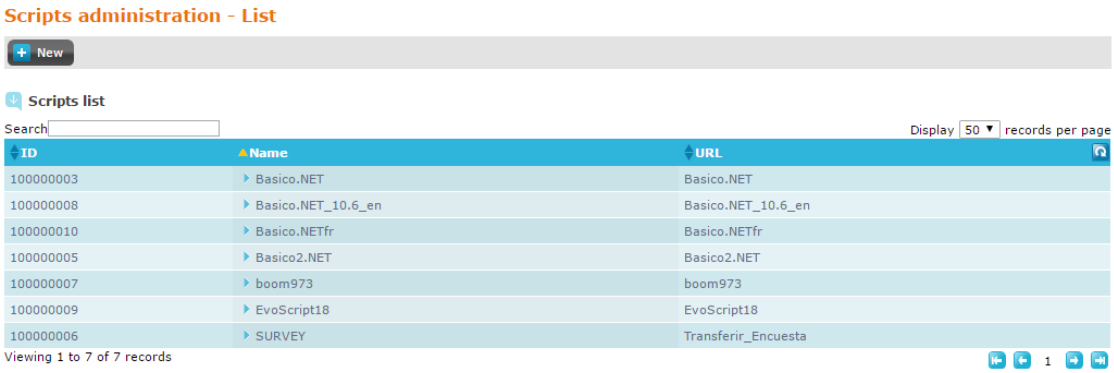
Applications or scripts are developed in the Omni+/Developer development environment. Once ready, they can be registered in the system through Manager.

By selecting the option *Scripts* from the side menu, the script general view is displayed.

If there are no scripts registered in the system, this immediately pops up in the *script registration view*.

7.4.5.1 SCRIPT LIST

This view can be accessed by clicking on the option *Scripts* on the side menu.



Script List

The list of all scripts registered in the system is displayed, with all significant data that define a script record: name and URL address.

To register a new script, click on 'Register.' To edit an existing script, select the script to be edited.

7.4.5.2 SCRIPT REGISTRATION

To create a new script, access [Register a Script].

Introducing the data shown is mandatory:

- Name Name to identify the script. A script whose name matches the name of an already existing script cannot be registered.
- URL Relative directory where the script itself is located. This field must coincide with the name given to the script in the scripts editor and cannot contain spaces.

If [*Close*] is selected, the script registration will be canceled.

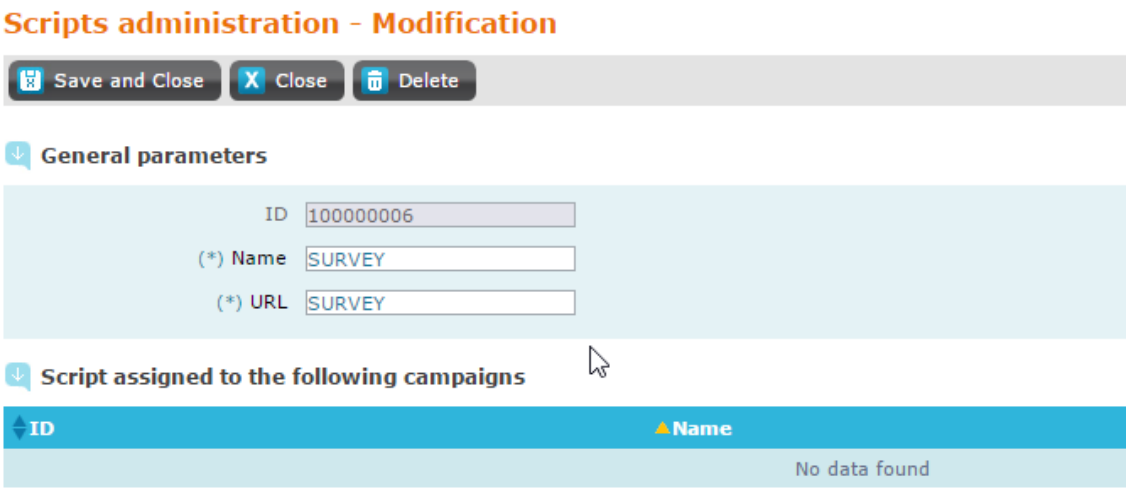
If [*Save and close*] is selected, the record corresponding to the new script is generated and we return to the scripts general view.

> It is also possible to indicate a script URL pointing to an external web application with the prefix "http:"

7.4.5.3 SCRIPT MODIFICATION/DELETION

To modify the definition of a script, double click on the script to be edited, which appears underlined.

Modify the fields and click [*Save and Close*] to update the changes.



Script modification page

Click on *Close* to cancel the operation. The same restrictions as described in the *Script Registration* section apply.

> The *Delete* option is only available if the script is not associated with any campaign. If it is, access campaigns and disassociate the script before deleting.

Consider that the Delete option does not only eliminate the script from the Omni+ set up, but it also eliminates the application from the IIS applications server.

7.4.6 DBR SCRIPTS

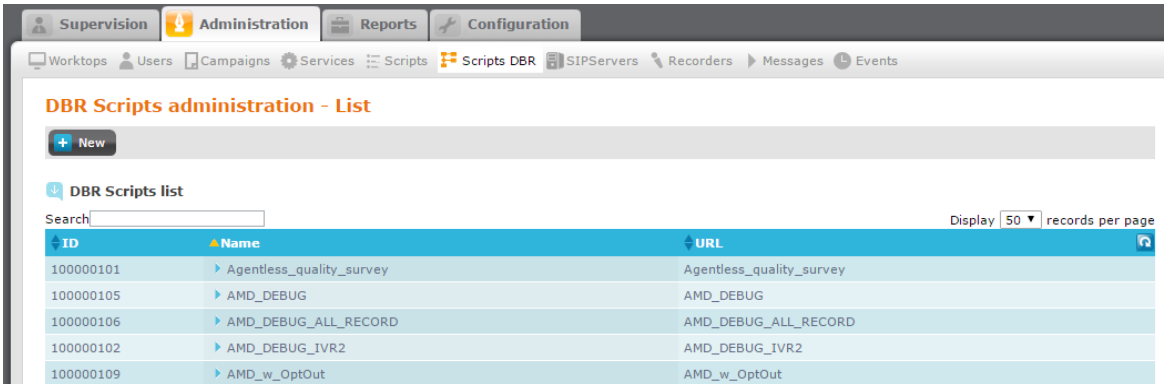
DBR scripts are developed in the Omni+/Developer development environment. Once ready, they can be registered in the system through Manager.

By selecting the option DBR Scripts from the side menu, the DBR scripts general view is displayed.

If there are no DBR scripts registered in the system, this immediately pops up in the DBR script registration view.

7.4.6.1 DBR SCRIPT LIST

This view can be accessed by clicking on the option DBR Scripts on the side menu.



DBR Script List

The list of all DBR scripts registered in the system is displayed, with all significant data that define a DBR script record: name and URL address.

To register a new DBR script, click on 'Register.' To edit an existing DBR script, select the DBR script to be edited.

7.4.6.2 DBR SCRIPT REGISTRATION

To create a new DBR script, access [New].

Introducing the data shown is mandatory:

- Name Name used to identify the DBR script. A DBR script whose name matches the name of an already existing DBR script cannot be registered.
- URL Relative directory where the DBR script itself is located. This field must coincide with the name given to the script in the DBR scripts editor (Developer.NET) and cannot contain spaces.

If [*Close*] is selected, the DBR script registration will be canceled.

If [*Save and close*] is selected, the record corresponding to the new DBR script is generated and we return to the DBR scripts general view.

> It is also possible to indicate a DBR script URL pointing to an external web application with the prefix "http:"

7.4.6.3 DBR SCRIPT MODIFICATION/DELETION

To modify the definition of a DBR script, double click on the DBR script to be edited, which appears underlined.

Modify the fields and click [*Save and Close*] to update the changes.

Click on *Close* to cancel the operation. The same restrictions apply as described in the *DBR Script Registration* section.

> The *Delete* option is only available if the script is not associated with any strategy. If it is, access strategies and disassociate the script before deleting.

Consider that the Delete option does not only eliminate the DBR script from the Omni+ set up, but it also eliminates the audio files published.

Publish audios and save copies the audio resources of the DBR script (speech and music on hold) in the Asterisk server set up.

7.4.7 SIP SERVERS

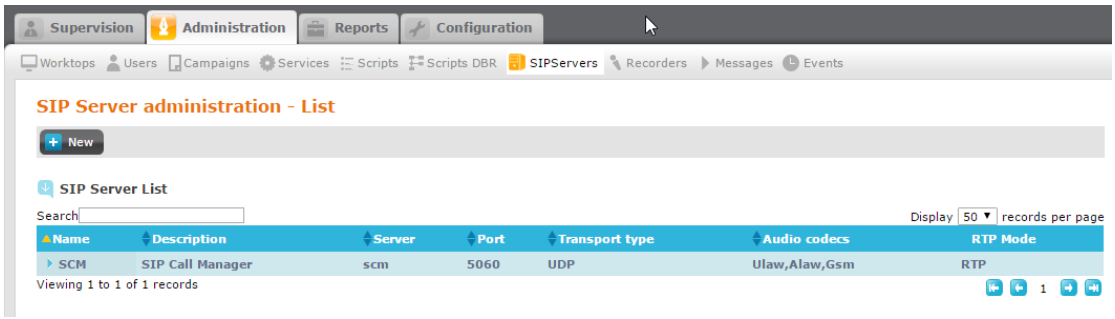
If you wish to use an iAgent integrated softphone, you will need to register at least one SIP server.

7.4.7.1 SIP SERVER LIST

This view can be accessed by clicking on the option SIP Servers on the menu. The list of all SIP servers registered in the system is displayed.

If there is no registered server in the system, this immediately pops up in the SIP *server registration* view.

To register a new server, click on 'New.' To edit an existing server, click on the name of the server to be



SIP Servers List

edited.

7.4.7.2 SIP SERVER REGISTRATION OR MODIFICATION

To create a new server, access [New].

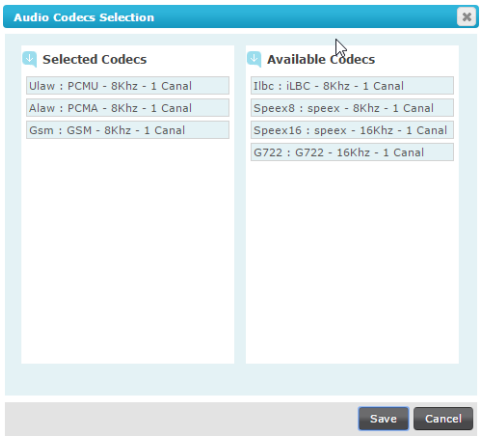
Introducing the data shown is mandatory:

- Name: the name used to identify the server.
- Description: server description.
- By default: Omni+ requires a SIP server by default, which will be used by agents to connect.
- Server: SIP server address
- Port: server's SIP port
- Transportation: server transportation protocol: UDP/TCP/TLS.
- Codecs Audio: audio codecs, ordered, to be used by the softphones connected to this server.

NAME	CODEC	FREQUENCY (KHz)	No. of CHANNELS
Alaw	PCMA	8	1
G722	G722	16	1
Gsm	GSM	8	1
Ilbc	iLBC	8	1
Speex8	Speex	8	1

Speex16	Speex	16	1
Ulaw	PCMU	8	1

To edit the codecs, click on 'Edit' or double-click on the list.
A window will display to drag the codecs from the windows of selected codecs to those available and vice-versa.
In addition, they can be ordered, which allows establishing the priority of the different selected codecs.
When finishing, click on 'Save' or 'Cancel' to discard changes.



- RTP Mode:
  - RTP: Standard RTP
  - SRTP: Secure RTP

If [Close*] is selected, the server registration will be canceled.*

If [*Save and close*] is selected, the record corresponding to the new server is generated and we return to the SIP servers general view.

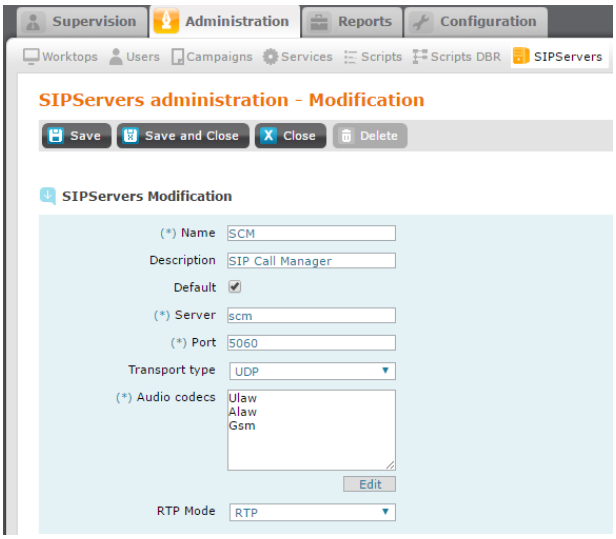


Figure 7.16 - SIP server modification page

The [*Delete*] option is only available if the server is not the default server.

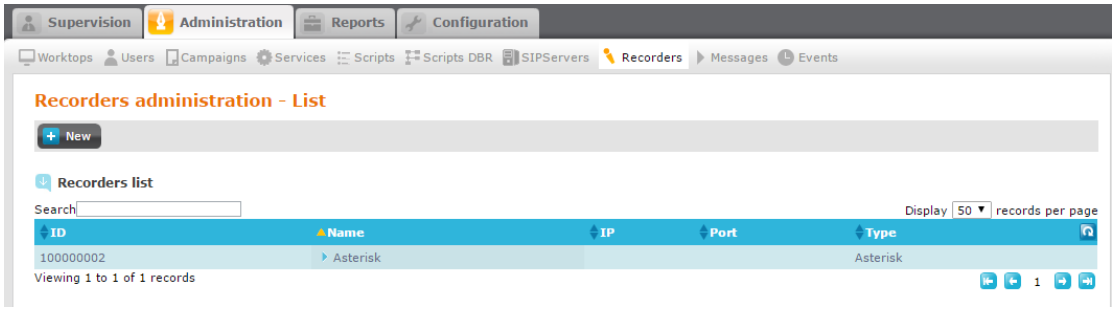
7.4.8 RECORDERS

If you have installed one or more Omni+/Recorder optional recording modules, they must be registered from the Manager option: RECORDERS.

7.4.8.1 RECORDER LIST

This view can be accessed by clicking on the option Recorders on the menu. The list of all recorders registered in the system is displayed.

If there are no recorders registered in the system, this immediately pops up in the *recorder registration* view.



Recorder List

To register a new recorder, click on 'New.' To edit an existing recorder, click on the name on the recorder to be edited.

7.4.8.2 RECORDER REGISTRATION OR MODIFICATION

To create a new recorder, access [New].

Introducing the data shown is mandatory:

- Name: used to identify the recorder.
- Type:
  - Omni+: Omni+ MP3 recorder.
  - NICE: Integration with external NICE recorder through NICE Bridge.
  - Asterisk: Integration with external Asterisk recorder.

Mandatory fields for Omni+ recorder:

- IP address: IP address where the recording server module is installed (RecorderDaemon, RecorderServer).
- TCP port: TCP port where the recording server module is installed (RecorderDaemon, RecorderServer). In a standard installation, the following TCP ports are used:
  - Omni+ recording module '639020985'.
  - Integrated module with NICE recorder '639020985'.

The NICE recorder has the Omni+ recorder modules as fields and the telephone private branch exchange identifier connected to NICE. *In addition to registering it in the system, you must set up the NICE Bridge connection as described in the Installation Manual.*

If [*Close*] is selected, the recorder registration will be canceled.

If [*Save and close*] is selected, the record corresponding to the new recorder is generated and we return to the recorders general view.

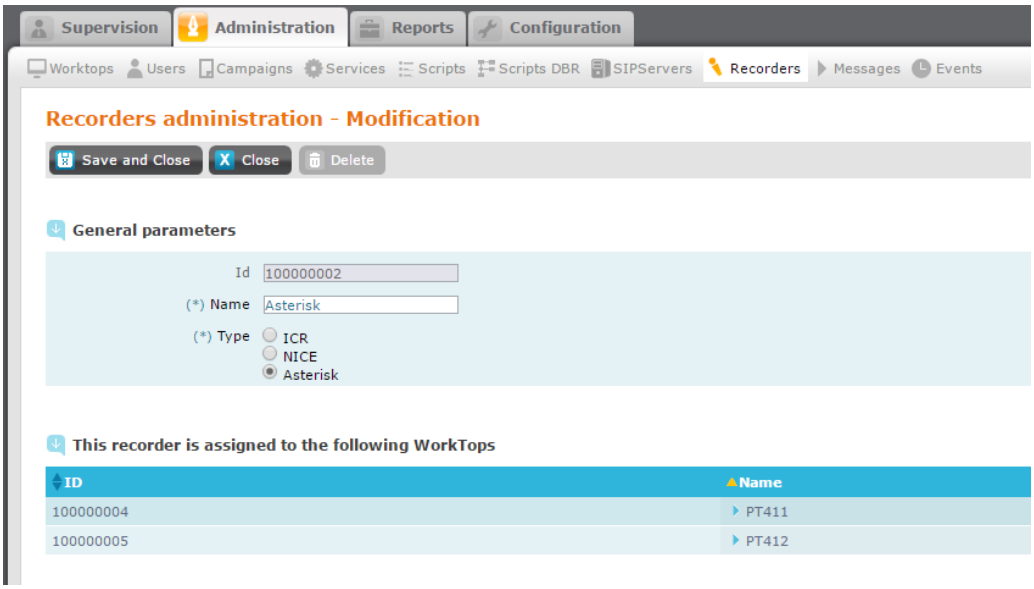


Figure 7.16 - Recorder Modification Page.

> The [Delete] option is only available if the recorder is not associated with any workstation. If it is, access workstations and disassociate the recorder before removing.
>
> If on modification mode, the workstations list with this associated recorder is displayed at the bottom of the page. Clicking on the workstation name, you can go to the workstation modification page.

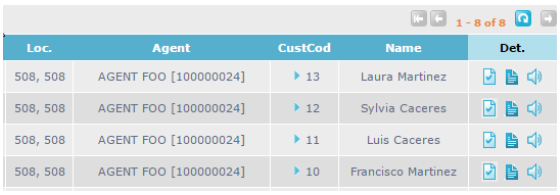
7.4.8.3 HOW TO LISTEN TO CALL RECORDINGS

Several Manager screens allow to listen to the recordings, for example the call dispositions report or the screens with the transaction details.

Listening to Recordings

Transactions list:

All recording segments are reproduced, concatenated.



Transaction detail:

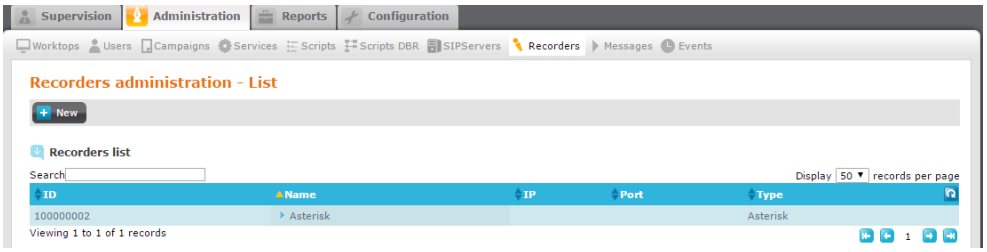
The different recording segments can be reproduced.

The reproduction of the MP3/WAV recording requires Windows Media Player or other compatible platers are installed in the Manager user PC.

7.4.9 MESSAGES

The messages view displays a list of ticker messages set up in the system.

To register a new message, click on 'Register message.' To edit an existing message, select the message to be edited.



NOTE: From this view, multiple messages can be activated/deactivated. To do this, conveniently modify the attribute "active" of the messages and click on "SAVE."

7.4.9.1 CREATE/EDIT MESSAGE

Introducing the data shown is mandatory:

- Message Message text
- Assigned to Message recipients:
  - All: All connected agents.
  - Service: All agents connected to the selected service.
  - Agent: To the selected agent.
- Active Agents only see active messages.

If [Save and close] is selected, data will be saved, and you will return to the messages view.

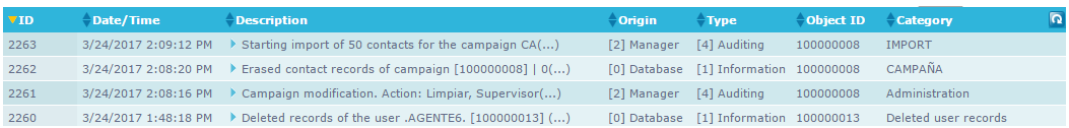
If [Close] is selected, the message edition will be canceled.

If [Delete] is selected, the message will be deleted.

7.4.10 EVENTS

This view informs about important events that have occurred in the system and that the administrator can consult.

Events will be deleted automatically after 7 days.



ID	Date/Time	Description	Origin	Type	Object ID	Category
2263	3/24/2017 2:09:12 PM	Starting import of 50 contacts for the campaign CA(...)	[2] Manager	[4] Auditing	100000008	IMPORT
2262	3/24/2017 2:08:20 PM	Erased contact records of campaign [100000008] | 0(...)	[0] Database	[1] Information	100000008	CAMPAÑA
2261	3/24/2017 2:08:16 PM	Campaign modification. Action: Limpiar, Supervisor(...)	[2] Manager	[4] Auditing	100000008	Administration
2260	3/24/2017 1:48:18 PM	Deleted records of the user .AGENTE6. [100000013] (...)	[0] Database	[1] Information	100000013	Deleted user records

Figure 7.16 - Visual aspect of the notice window

Additionally, you can click on the "notice window" button. The purpose of this "notice window" is to show —in real time—the new Manager "events" module record without the user having to consult or refresh any screen. This notice window only shows the events whose origin is 2 (dashboard).

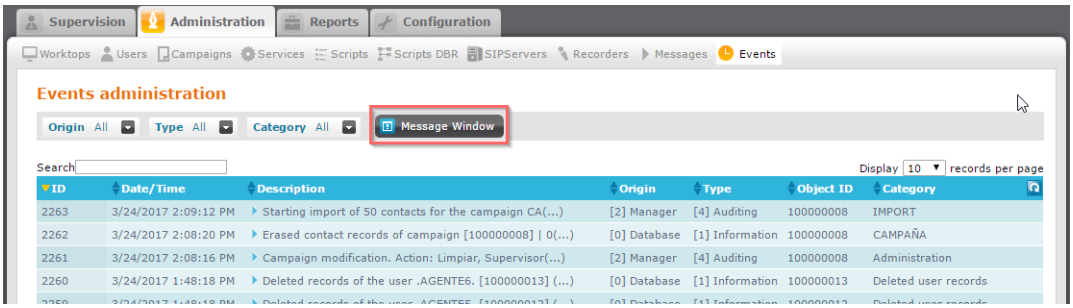


Figure 7.16 - Area where the "notice window" button is located.

When the supervisor user connects to Manager and logs in, the window will display empty.

The notice window will consult the existence of new records in 1-minute intervals, approximately.

Each notice is shown in a row, with the following format:

```
DATE/TIME | No. of Records Upload in "CAMPAIGN NAME [CAMPAIGN ID]"
```

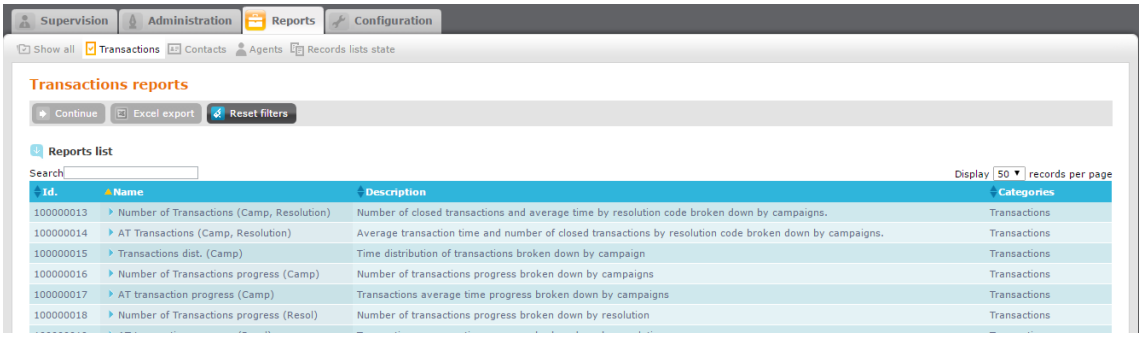
If the user clicks on a notice icon  , this will disappear and change the color of the corresponding row, indicating the notice has already been read. The 'unread' notices will have a color that stands out on the screen.

When a new notice is added to the window, there will be a "pop up," on the foreground over other windows of the Windows desktop.

7.5 REPORT MODULE

Reports are grouped under different categories:

- Transactions
- Contacts
- Agents
- Lists status



To execute the report, select it from the list. To return to the reports lists only click on the selected report again.

7.5.1 COMMON REPORT FEATURES

Reports show a name and description. The name follows a standard nomenclature for easy recollection and prediction of the results that will be obtained:

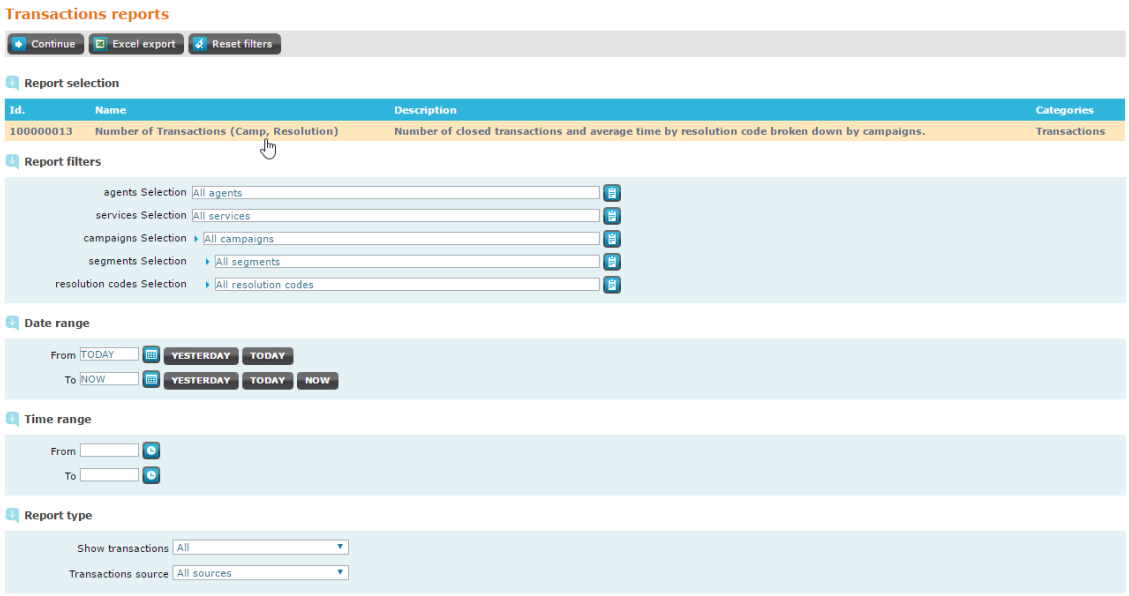
- *Dist.: time distribution.*
- *Num.: number.*
- *Prog: data progress over time.*
- *AT: average time.*

In brackets, at the end of the name, the itemization applied can be seen.

- *Agen* : agents.
- *Camp*: campaigns.
- *Resol.*: call dispositions.
- *ResolutionGrp*: groups of call dispositions.
- *Paus:* pause reasons.
- *Segm*: segments.
- *Serv*: service.s

7.5.1.1 REPORT FILTERS

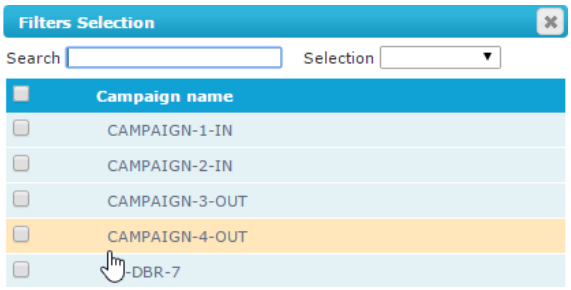
Each report type allows the selection of several filters and parameters. The following table describes the filters for the report selection.



FILTER	DESCRIPTION
Agent	Allows selecting the agents from whom we want to obtain information. All agents are selected by default.
Data clustering	Refers to clusters by date. Allows seeing the information by Days/Months.
Campaign	Allows selecting the campaigns from which we want to obtain information. All campaigns are selected by default.
Channel	Allows selecting the channel by which contact was established: telephone, e-mail, ...
Data itemization	Allows selecting the presentation of reports (by columns or rows) related to additional client data.
Delivered to agent	Allows distinguishing the transactions between those that have been delivered to an agent and those that have not.
Pause status	Allows filtering by agent pauses in progress, finalized or both.
Session status	Allows filtering by agent sessions in progress, finalized or both.
call dispositions codes	Allows selecting/filtering the call dispositions we want to list for this specific report.
Groups of call dispositions codes	Allows selecting a group of call dispositions.
Date intervals	Select the interval for consultation, specifying both dates of the interval.
Hour interval	Allows selecting the time slot within which the requested records are found.
Pause reasons	Allows selecting/filtering the pause reasons of agents we want to list for this specific report.
Service objective	Allows indicating the value of the service objective for the report. If left blank, the one assigned to each one of the campaigns shown in the result will be used. Time must be expressed in the following way: Ad Bh Cm Ds. Where, Ad: A days, Bh: B hours, Cm C minutes and Ds: D seconds, with A, B, C, D positive numbers, not necessary to include all elements. Examples: 1m 30s, 2h, 1d 12h,...
Transaction origin	Allows selecting the transaction origin:

	• Non-defined • Inbound Switch Based Routing • Inbound Dynamic Business Routing • In-person • Preview • Dialer • Returned to queue
Segment	If defined in a campaign, it allows choosing the client segments to be listed in the report.
Call direction	Calls can be inbound or outbound. The report selection allows viewing only calls made by an agent or in a campaign, and all the calls.
Service	Allows selecting the service for which we want to view the inbound/outbound call distribution. For a global view, all services can be selected (by default option).
Variables	Allows selecting incentives.

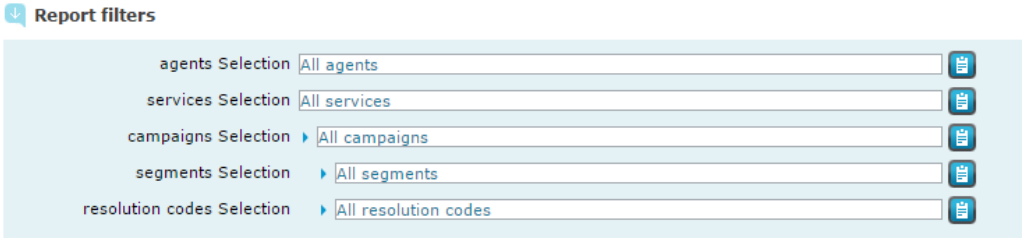
Selection filters allow selecting multiple elements.



In addition, some have a hierarchy; consequently, when selecting a filter, those which are of an inferior order are limited by the preceding.

Example: Services ➔ will filter Campaigns ➔will filter Segments and call dispositions codes.

It is possible to select an inferior filter without indicating the superior order, for example, selecting a segment without having selected Campaign or Service. However, if after selecting the segment we select the Campaign or Service, the Segment selection will be lost and will be filtered by the superior order filter selected (Campaign or Service).



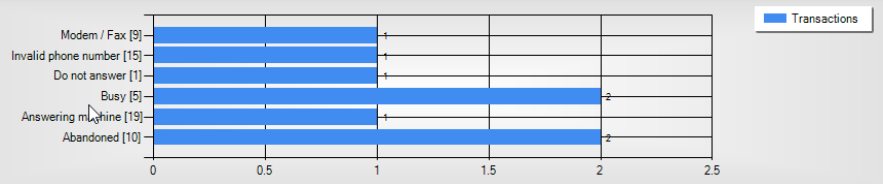
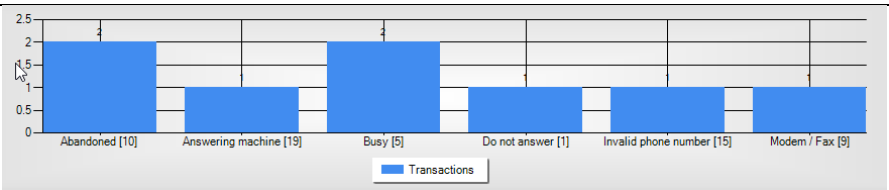
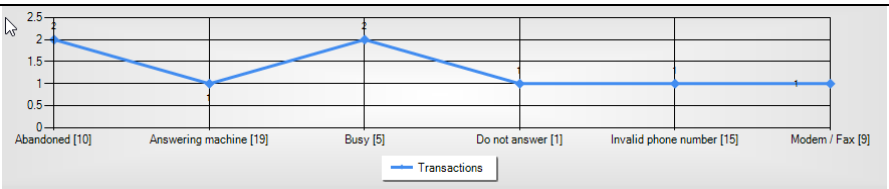
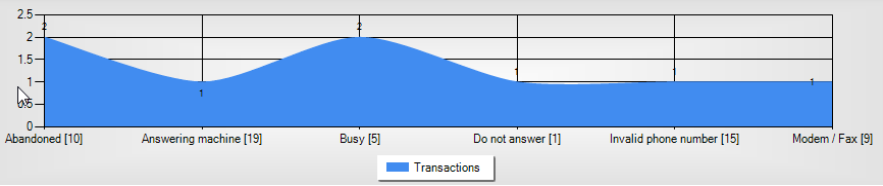
Once the report has been requested (by clicking on continue), the filters selected will be saved. It is possible to delete its value by clicking on Clean Filters.

7.5.1.2 DATA GRAPHICS

Some reports have a graphic representation, but such presentation can be changed. The drop-down menu can be seen at the top:

it allows selecting the report's data representation.

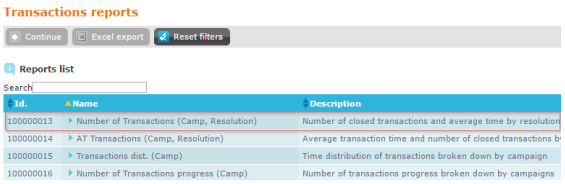
By dragging the mouse over the pie graphic, the representation of the different elements and their absolute values will be seen. In the rest of representations, the element and percentage it represents within the total will be displayed.

Pie	
Bars	
Columns	
Lines	
Areas	

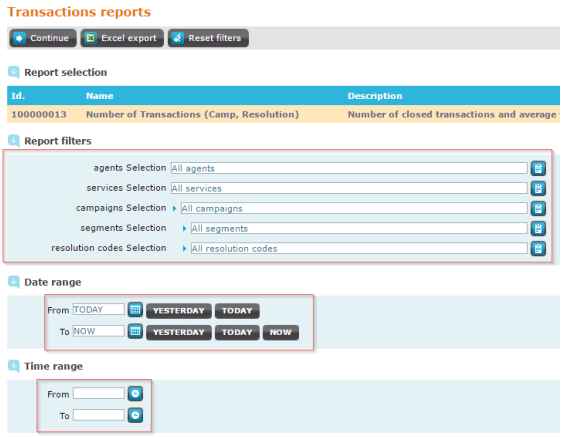
7.5.2 HOW TO GENERATE A REPORT

How to Generate a Report

1 Select the report from the corresponding list.



2 Filters available for it will be displayed. Select different filters.



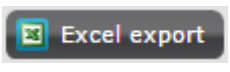
3 Click on continue. The report opens in a new window.

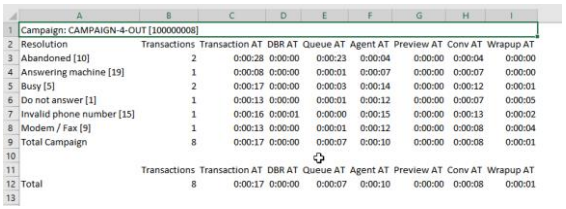
7.5.3 HOW TO EXPORT A REPORT TO AN MS EXCEL FORMAT

Main reports can be exported to an Excel format.

How to Export a Report to an MS Excel Format

1 To view the report in Excel format, click on the button [Excel export] at the top of the report.



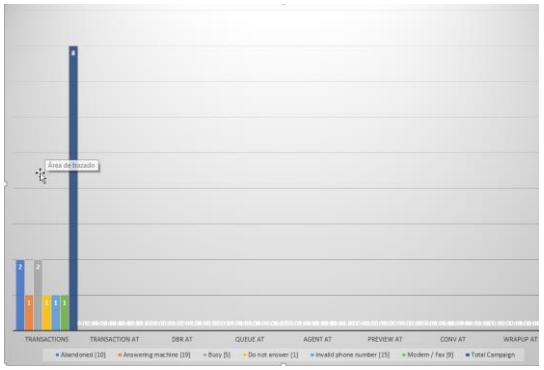
2	Example: Excel format of the call distribution report.	

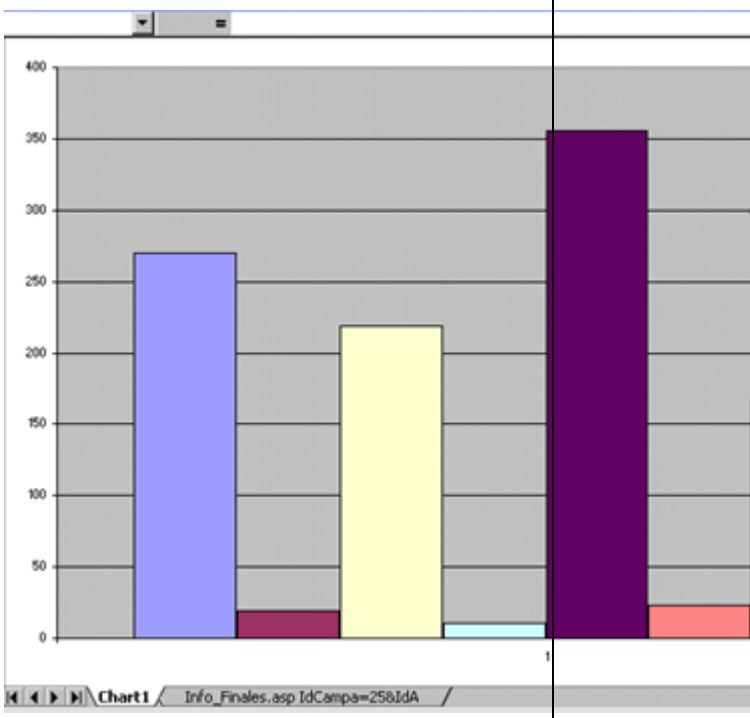
A	B	C	D	E	F	G	H	I
Campaign: CAMPAIGN-4-OUT [100000008]								
Resolution	Transactions	Transaction AT	DBR AT	Queue AT	Agent AT	Preview AT	Conv AT	Wrapup AT
Abandoned [10]	2	0:00:28	0:00:00	0:00:23	0:00:04	0:00:00	0:00:04	0:00:00
Answering machine [19]	1	0:00:08	0:00:00	0:00:01	0:00:07	0:00:00	0:00:07	0:00:00
Busy [5]	2	0:00:17	0:00:00	0:00:03	0:00:14	0:00:00	0:00:12	0:00:01
Do not answer [1]	1	0:00:13	0:00:00	0:00:01	0:00:12	0:00:00	0:00:07	0:00:05
Invalid phone number [15]	1	0:00:16	0:00:01	0:00:00	0:00:15	0:00:00	0:00:13	0:00:02
Modem / Fax [9]	1	0:00:13	0:00:00	0:00:01	0:00:12	0:00:00	0:00:08	0:00:04
Total Campaign	8	0:00:17	0:00:00	0:00:07	0:00:10	0:00:00	0:00:08	0:00:01
	Transactions	Transaction AT	DBR AT	Queue AT	Agent AT	Preview AT	Conv AT	Wrapup AT
Total	8	0:00:17	0:00:00	0:00:07	0:00:10	0:00:00	0:00:08	0:00:01

7.5.4 HOW TO ADD GRAPHICS TO THE EXCEL REPORT

To make graphics based on the Excel report data:

1- Select the data required in the Excel report and press F11.
2- Excel automatically inserts a new page and creates a graphic in it based on the data selected.
3- Pressing the right button on the mouse, the graphics menu displays. With it, the necessary modifications can be made.
4-

Graphic created in Excel based on the data provided by Manager.	

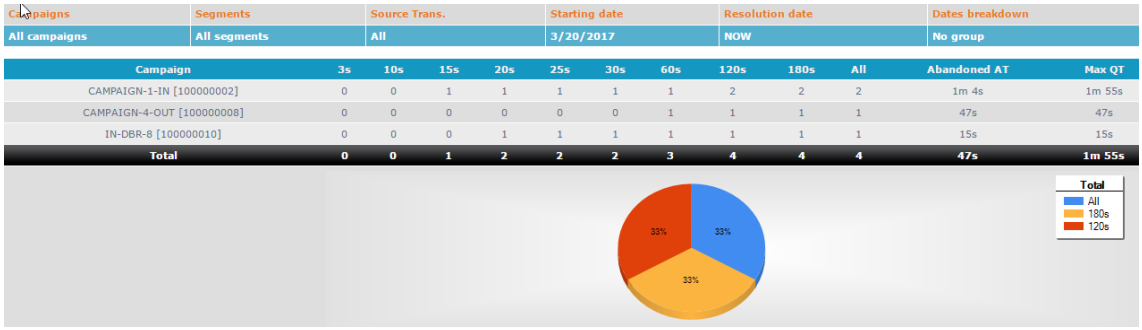
Example of a graphic created in Excel based on the data provided by Manager. Most transactions have call disposition with "Connecting" or "No Answer."	

7.5.5 TRANSACTIONS REPORT

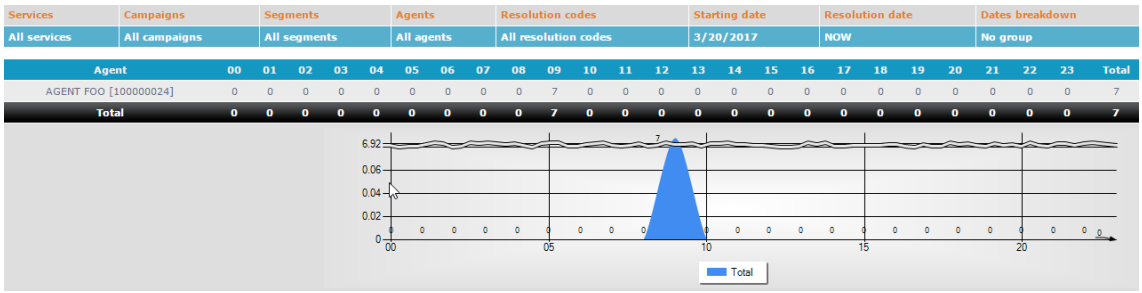
Transactions made. We can filter using several criteria and cluster data by different elements.

Report Types:

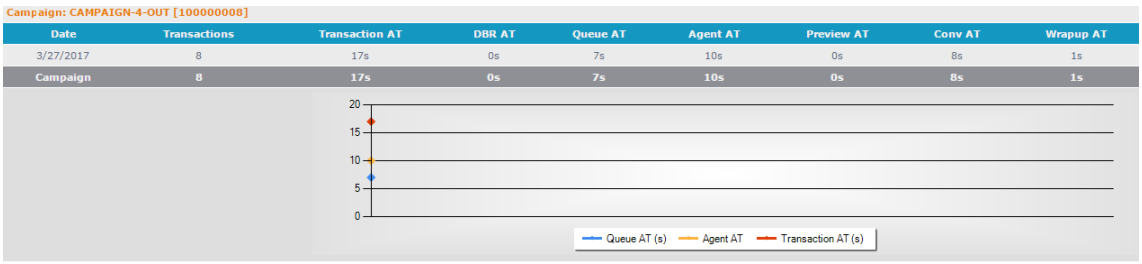
- Abandoned, undelivered transactions to agent with Abandoned call disposition, show data clustered by time slot or a user-select threshold. They also show average time and the maximum value of queue waiting time of abandoned dial-ups.



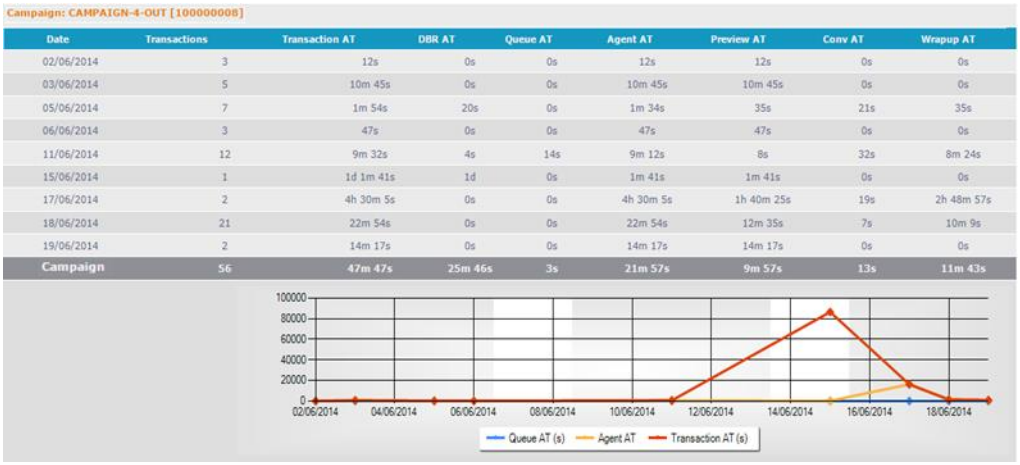
- Time distribution: reports distributed by hours from 00 to 12 PM (00:00-23.59). They represent transactions started at that time.



- Progress of the number of transactions over time. They represent the number of transactions started and the average queue waiting, agent's management task (if transactions delivered to agent are requested) and complete management task times, a long time since the information can be presented by day or months.



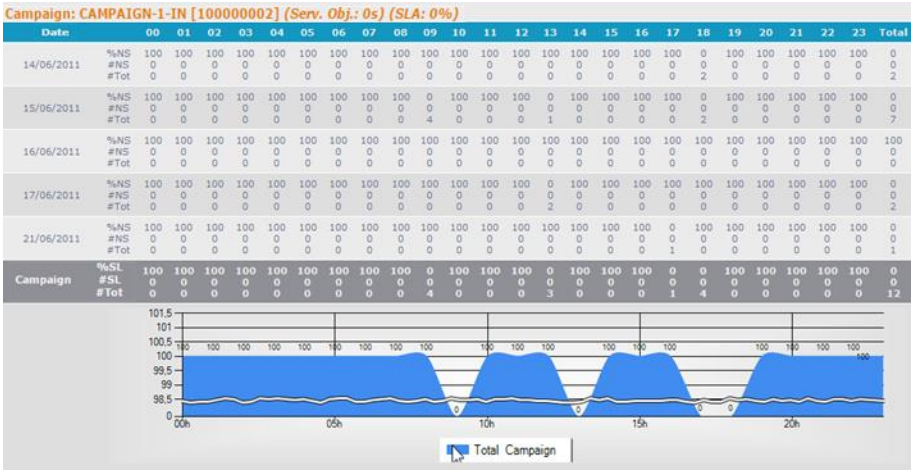
- Progress of the transaction average time over time. It presents the same information as above, but representing average times.



Campaign: CAMPAIGN-4-OUT [100000008]

Date	Transactions	Transaction AT	DBR AT	Queue AT	Agent AT	Preview AT	Conv AT	Wrapup AT
02/06/2014	3	12s	0s	0s	12s	12s	0s	0s
03/06/2014	5	10m 45s	0s	0s	10m 45s	10m 45s	0s	0s
05/06/2014	7	1m 54s	20s	0s	1m 34s	35s	21s	35s
06/06/2014	3	47s	0s	0s	47s	47s	0s	0s
11/06/2014	12	9m 32s	4s	14s	9m 12s	8s	32s	8m 24s
15/06/2014	1	1d 1m 41s	1d	0s	1m 41s	1m 41s	0s	0s
17/06/2014	2	4h 30m 5s	0s	0s	4h 30m 5s	1h 40m 25s	19s	2h 48m 57s
18/06/2014	21	22m 54s	0s	0s	22m 54s	12m 35s	7s	10m 9s
19/06/2014	2	14m 17s	0s	0s	14m 17s	14m 17s	0s	0s
Campaign	56	47m 47s	25m 46s	3s	21m 57s	9m 57s	13s	11m 43s

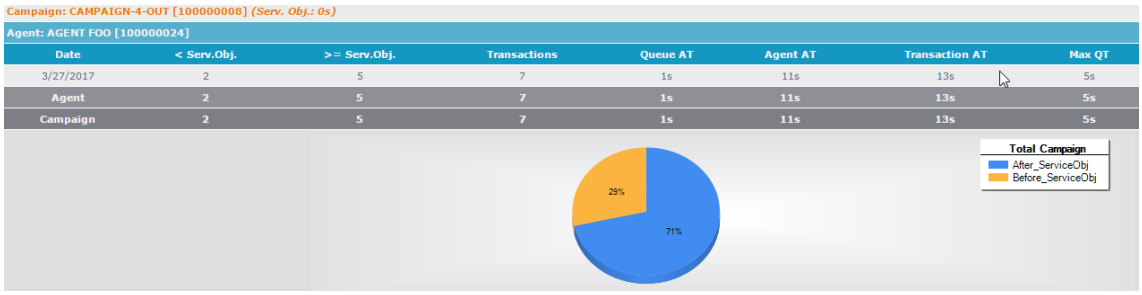
- Progress of service level (SL) in DBR Inbound, representing three data:
    - the level of service offered (the result of dividing the two data explained next and transforming it in percentage). It is the datum represented.
    - the number of calls answered complying with the service objective established for the campaign.
    - the total number of calls answered plus the abandoned ones after waiting in queue longer than the service objective.



Campaign: CAMPAIGN-1-IN [100000002] *(Serv. Obj.: 0s) (SLA: 0%)*

Date		00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
14/06/2011	%NS	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	0	100	100	100	100	100	0
	#NS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	#Tot	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	2
15/06/2011	%NS	100	100	100	100	100	100	100	100	100	0	100	100	100	0	100	100	100	100	0	100	100	100	100	100	0
	#NS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	#Tot	0	0	0	0	0	0	0	0	0	4	0	0	0	1	0	0	0	0	2	0	0	0	0	0	7
16/06/2011	%NS	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100
	#NS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	#Tot	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
17/06/2011	%NS	100	100	100	100	100	100	100	100	100	100	100	100	100	0	100	100	100	100	100	100	100	100	100	100	0
	#NS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	#Tot	0	0	0	0	0	0	0	0	0	0	0	0	0	2	0	0	0	0	0	0	0	0	0	0	2
21/06/2011	%NS	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	100	0	100	100	100	100	100	100	0
	#NS	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	0
	#Tot	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	1	0	0	0	0	0	0	1
Campaign	%SL	100	100	100	100	100	100	100	100	100	0	100	100	100	0	100	100	100	0	0	100	100	100	100	100	0
	#SL	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
	#Tot	0	0	0	0	0	0	0	0	0	4	0	0	0	3	0	0	0	1	4	0	0	0	0	0	12

- Transactions delivered to agent distinguishing those delivered before and after a user-select threshold. They also show average time and the maximum value of queue waiting time.

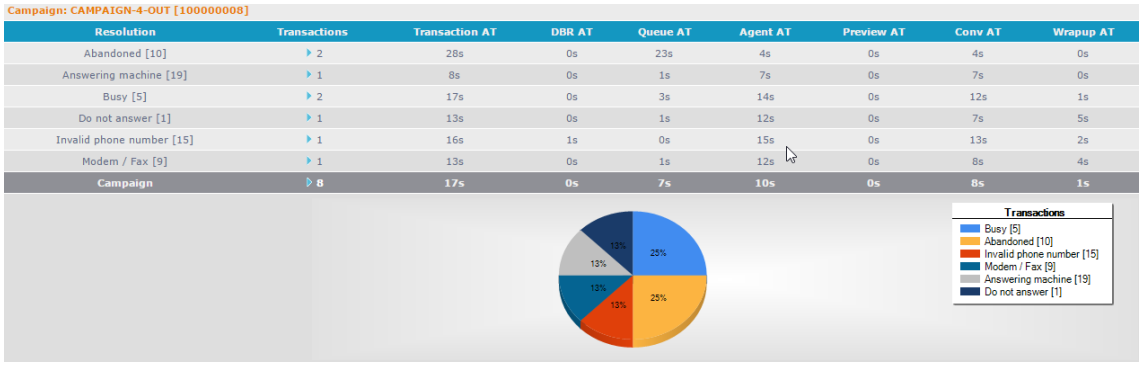


Campaign: CAMPAIGN-4-OUT [100000008] *(Serv. Obj.: 0s)*

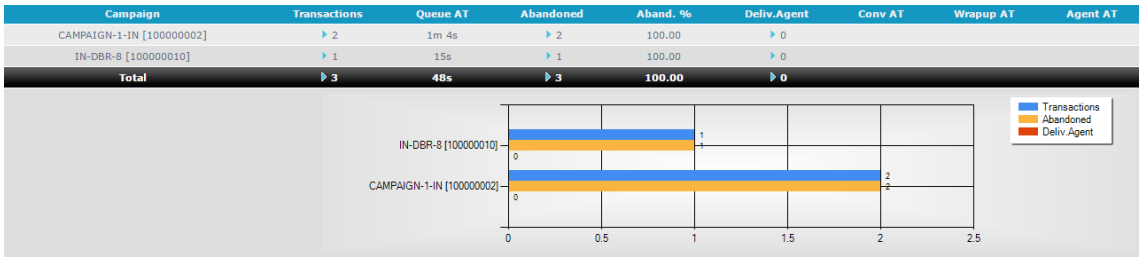
Agent: AGENT FOO [100000024]

Date	< Serv.Obj.	>= Serv.Obj.	Transactions	Queue AT	Agent AT	Transaction AT	Max QT
3/27/2017	2	5	7	1s	11s	13s	5s
Agent	2	5	7	1s	11s	13s	5s
Campaign	2	5	7	1s	11s	13s	5s

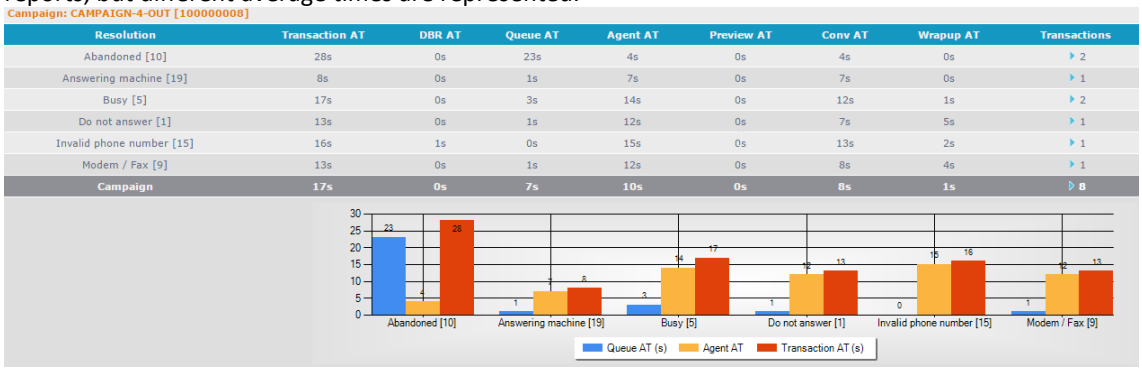
- Number of transactions. They present the same information as progress reports, but not by dates, although information can be clustered by Call dispositions, Call dispositions Groups, segments...and include links to a detailed list of transactions.



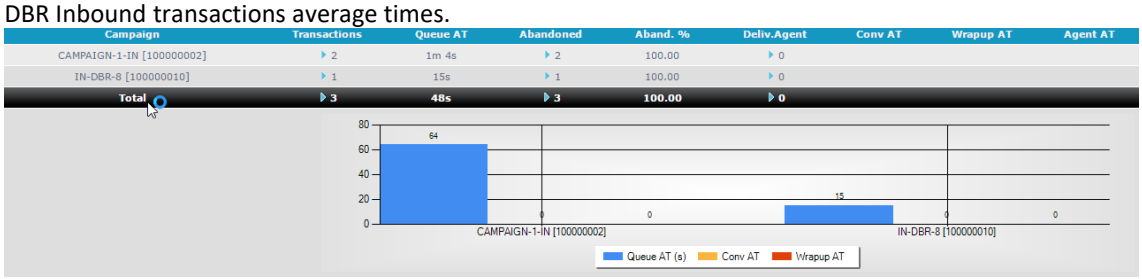
- Number of DBR Inbound transactions presents slightly different information. This report does not filter by transactions delivered to agent because it includes the number of abandoned and delivered transactions, as well as the average conversation and management task times, which represents the itemization of the agent's average time. Clustering all information by campaigns.



- Average transaction times. They present the same information as the Number of transactions reports, but different average times are represented.



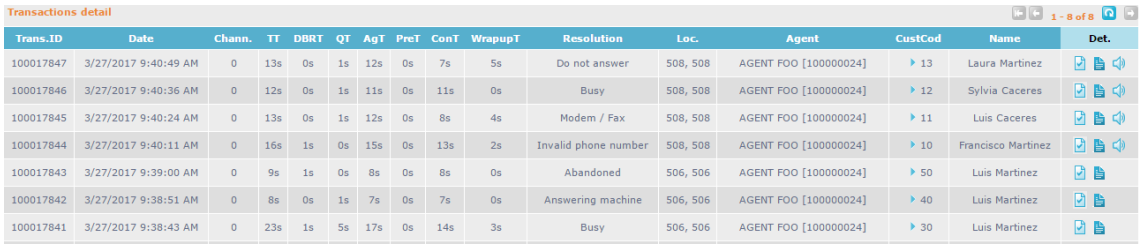
- DBR Inbound transactions average times.



7.5.5.1.1 DETAILED LIST OF TRANSACTIONS

Some reports have links on the number of transactions to a detailed list of these transactions. That list displays:

Trans.Id.	Transaction identifier.
Date	Date and time of transaction creation.
QT	Client queue waiting time.
AgT	Time an agent has dedicated to take the transaction.
TMs	Total management task time It will not always be QT + AgT; for example, in dialer calls, the client does not queue until they answer the phone, but the transaction is created when the call is made. In this case, the call buzzing-out on the client does not correspond to queue waiting time nor to agent time.
Call disposition	Call disposition applied to the transaction.
Loc.	Locators used in client contact.
Agent	Agent who took the transaction.
Cust.Cod.	Client code, by clicking on that code, the client detail page can be accessed.
Name	Client's complete name.
Det.	 Shows all the information of the client's transactions.
	 Widens the information on a specific transaction.
	 Reproduces the call recording.
	 Indicates there are various fragments (if we hover with the mouse, it will indicate how many), if we click on it, it will reproduce all.



Transactions detail — 1 - 8 of 8

Trans.ID	Date	Chann.	TT	DBRT	QT	AgT	PreT	ConT	WrapupT	Resolution	Loc.	Agent	CustCod	Name	Det.
100017847	3/27/2017 9:40:49 AM	0	13s	0s	1s	12s	0s	7s	5s	Do not answer	508, 508	AGENT FOO [100000024]	13	Laura Martinez	
100017846	3/27/2017 9:40:36 AM	0	12s	0s	1s	11s	0s	11s	0s	Busy	508, 508	AGENT FOO [100000024]	12	Sylvia Caceres	
100017845	3/27/2017 9:40:24 AM	0	13s	0s	1s	12s	0s	8s	4s	Modem / Fax	508, 508	AGENT FOO [100000024]	11	Luis Caceres	
100017844	3/27/2017 9:40:11 AM	0	16s	1s	0s	15s	0s	13s	2s	Invalid phone number	508, 508	AGENT FOO [100000024]	10	Francisco Martinez	
100017843	3/27/2017 9:39:00 AM	0	9s	1s	0s	8s	0s	8s	0s	Abandoned	506, 506	AGENT FOO [100000024]	50	Luis Martinez	
100017842	3/27/2017 9:38:51 AM	0	8s	0s	1s	7s	0s	7s	0s	Answering machine	506, 506	AGENT FOO [100000024]	40	Luis Martinez	
100017841	3/27/2017 9:38:43 AM	0	23s	1s	5s	17s	0s	14s	3s	Busy	506, 506	AGENT FOO [100000024]	30	Luis Martinez	

If the center is functioning, transactions will keep being made and if the final date filter has not been established, the total seen (calculated from the previous page) cannot be updated. To recalculate the total and reload the current page, click on the button  :

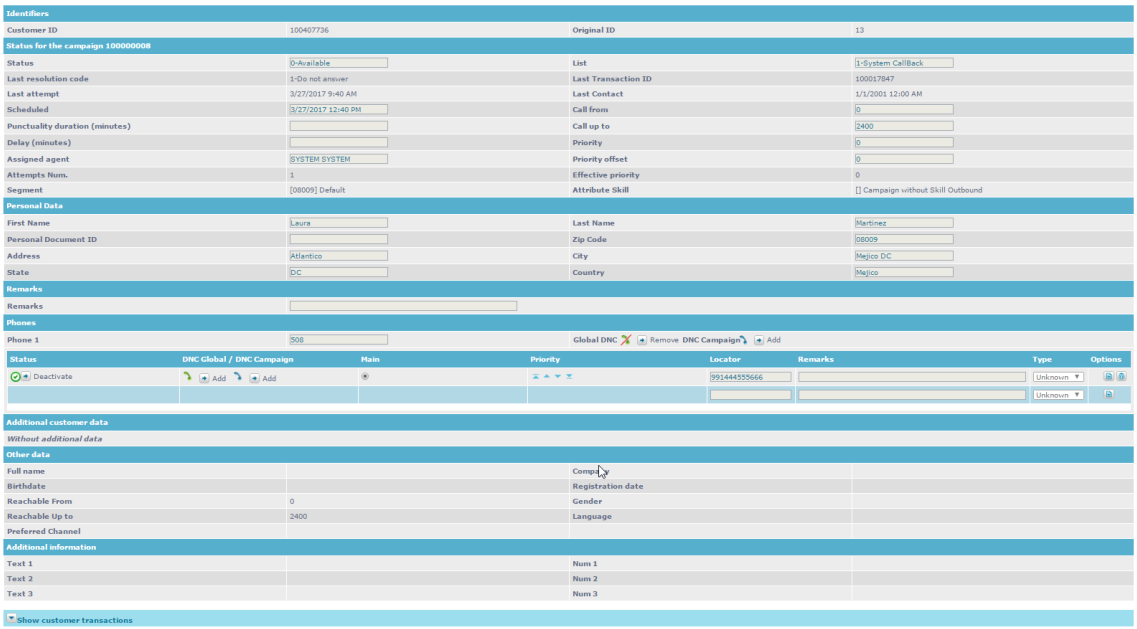
7.5.5.1.2 CLIENT INFORMATION VIEW

This view displays the client's information and allows displaying all their transactions. By double-clicking on the client's data editing boxes, each one of the values can be modified.

Client information

Identifiers	Internal identifier (Subjectid) and external (Originalid) of the client's record.
Status	Record status in the campaign calls list .
Personal Data	Relevant record data, stored in the CLIENTS table.

Comments	Comments stored in the record
Contact Data	Secondary record data, stored in the CLIENTS table. Note: This data is available for applications, but does not intervene in the automatic dial-up process.
Telephones	Main contact data, stored in the CLIENTS and tbLocator table. The field Telephone 1 is the forced locator. They can be added to or deleted from the DNC list of the campaign or Global.
	The locators list comprises the record's alternative telephone list and can be edited completely from this view.
Other data	Other data stored in the CLIENTS table.
Additional Information	Generic fields stored in the CLIENTS table.



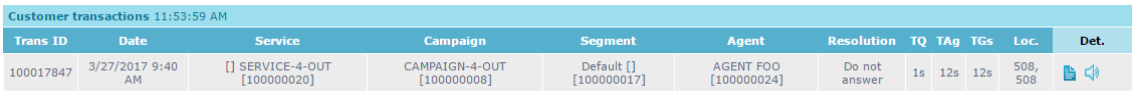
Transaction History

Trans.Id.	Transaction identifier.
Date	Date and time of transaction creation.
Service	Service during which the transaction was made.
Campaign	Campaign during which the transaction was made.
Agent	Agent who took the transaction.
Call disposition	Call disposition applied to the transaction.
QT	Client queue waiting time.
AgT	Time an agent has dedicated to take the transaction.
TMs	Total management task time It will not always be QT + AgT; for example, in dialer calls, the client does not queue until they answer the phone, but the transaction is created when the call is made. In this case, the call buzzing-out on the client does not correspond to queue waiting time nor to agent time.
Loc.	Locators used in client contact.
Det.	Shows all the information of the client's transactions.

Widens the information on a specific transaction.

Reproduces the call recording.

Indicates there are various fragments (if we hover with the mouse, it will indicate how many), if we click on it, it will reproduce all.

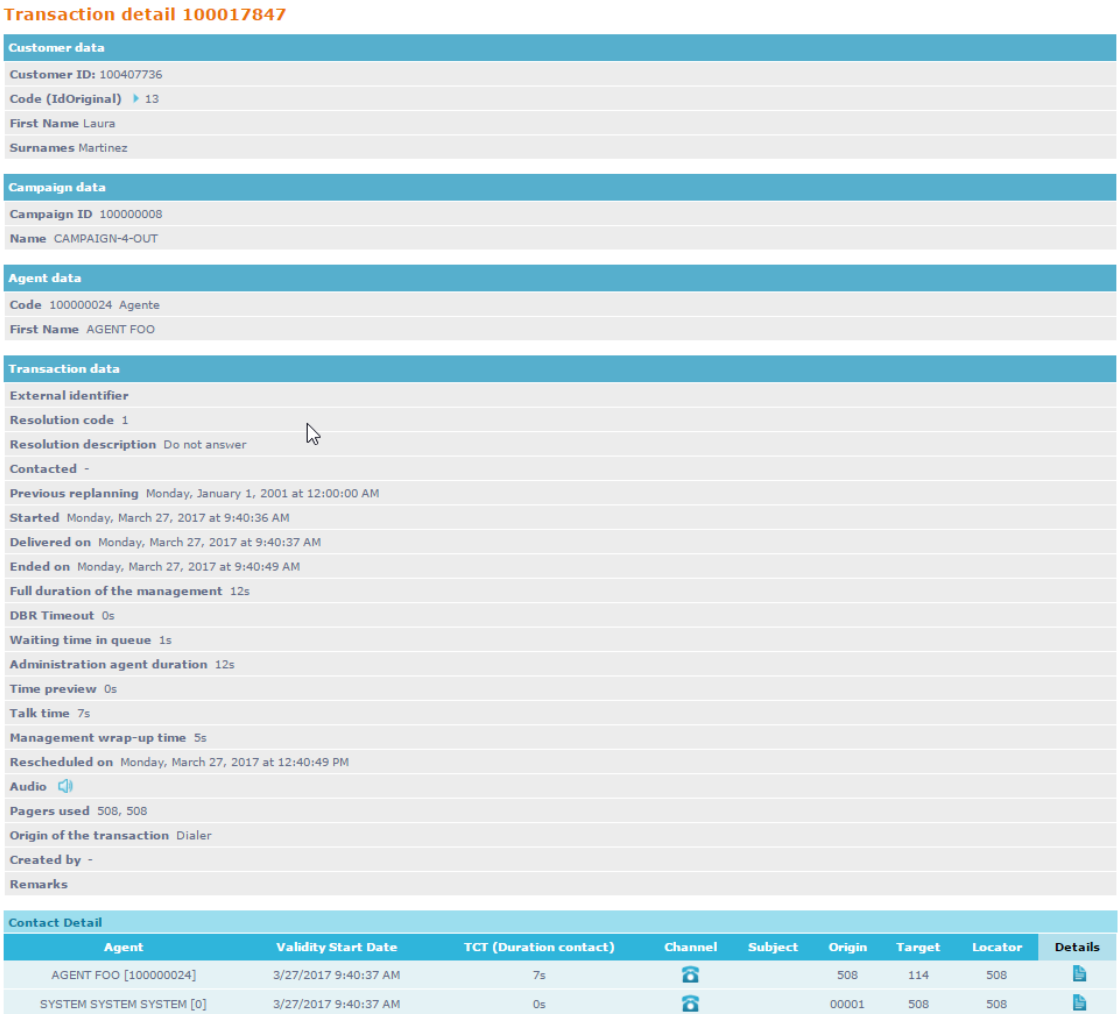


Customer transactions 11:53:59 AM

Trans ID	Date	Service	Campaign	Segment	Agent	Resolution	TQ	TAg	TGs	Loc.	Det.
100017847	3/27/2017 9:40 AM	[] SERVICE-4-OUT [100000020]	CAMPAIGN-4-OUT [100000008]	Default [] [100000017]	AGENT FOO [100000024]	Do not answer	1s	12s	12s	508, 508	

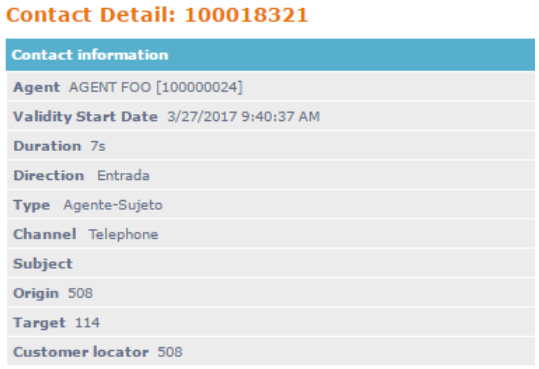
7.5.5.1.3 TRANSACTION-DETAIL VIEW

This view displays detailed information of the transactions, showing, also, a list with all the contacts linked, which allows accessing a detailed view of each contact.



7.5.5.1.4 CONTACT-DETAIL VIEW

This view displays the contact's detailed information, allowing the visualization of the document associated with the contact if it exists.



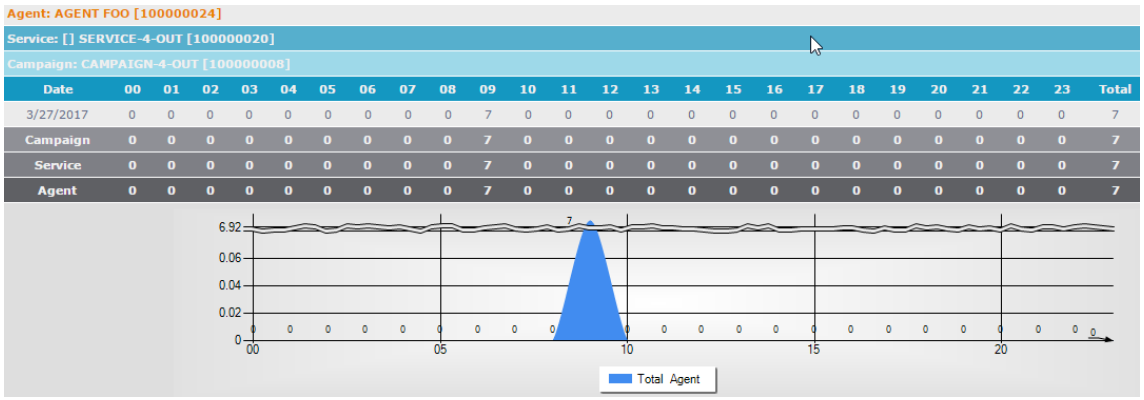
7.5.6 CONTACT REPORTS

This report allows visualizing the contact made by agents with clients during campaigns, both inbound and outbound.

> IMPORTANT: The number of contacts made/received by an agent does not necessarily match the number of transactions (Call dispositions report).
>
> A transaction can have no (For example: in a previous view, a client file was requested, but the call was not made), one or many (for example: if there has been call transaction between agents or multiple contacts are made within the same transaction) contacts made with a subject.

Report Types:

- Time distribution: a report distributed by hours from 00 to 12 PM (00:00-23.59).
- Progress of the number of transactions over time.
- Progress of the average contact service time over time.
- Number of contacts.
- Average time per contact.



Date	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	Total
3/27/2017	0	0	0	0	0	0	0	0	0	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7
Campaign	0	0	0	0	0	0	0	0	0	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7
Service	0	0	0	0	0	0	0	0	0	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7
Agent	0	0	0	0	0	0	0	0	0	7	0	0	0	0	0	0	0	0	0	0	0	0	0	0	7

7.5.7 AGENT REPORTS

Call center agent productivity reports.

Incentives Reports.

Comparison between agent transactions and average times in relation to campaigns.

Agent session reports.

Agent pause reasons reports.

7.5.7.1 INCENTIVE REPORTS

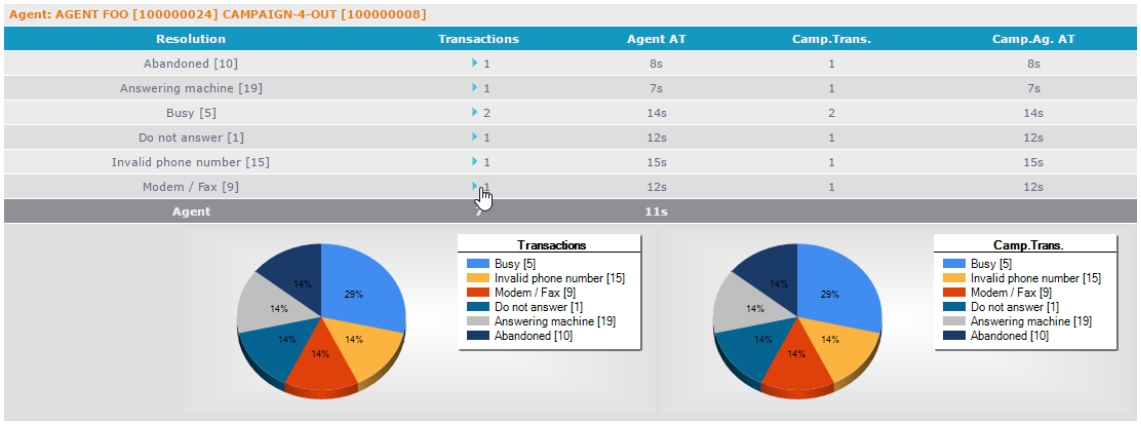
They show the points/incentives awarded to agents in the different campaigns.

There are two types of reports:

- Total of points/incentives.
- Progress over time of the points/incentives awarded to each agent.

7.5.7.2 COMPARISON BETWEEN AGENT TRANSACTIONS AND AVERAGE TIMES IN RELATION TO CAMPAIGNS

For each agent in each campaign, they show the different Call dispositions closed in this campaign, showing how many each agent has closed, as well as the average times per Call dispositions.

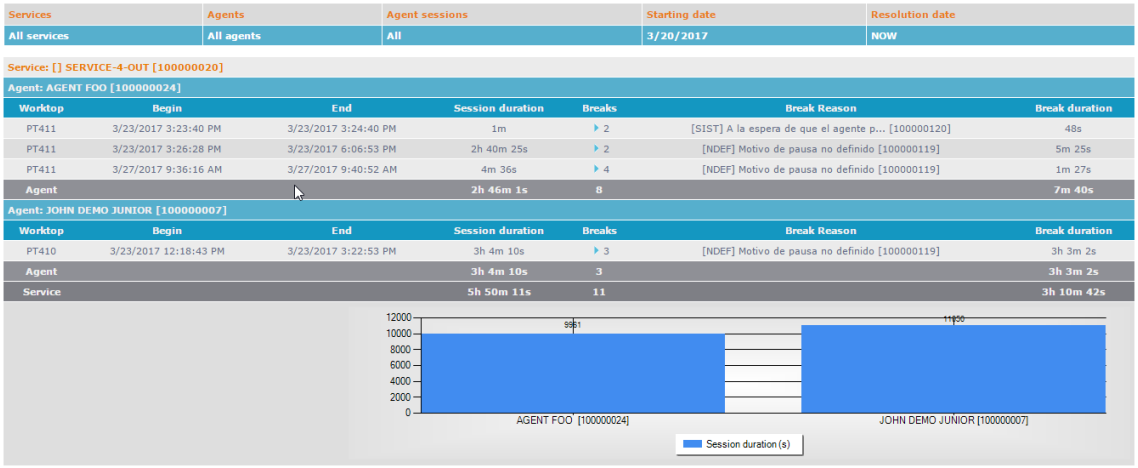


7.5.7.3 AGENT SESSION REPORTS

Information about agent service sessions and their participation in the campaigns.

There are three types of reports:

- Agent sessions, agent session list per service and agent and vice versa. The field "number of pauses" allows going to a new list with the details of such pauses. The field "reason for disconnection" is the reason of the last pause before the agent disconnects from the session.



Services	Agents	Agent sessions	Starting date	Resolution date
All services	All agents	All	3/20/2017	NOW

Service: [] SERVICE-4-OUT [100000020]

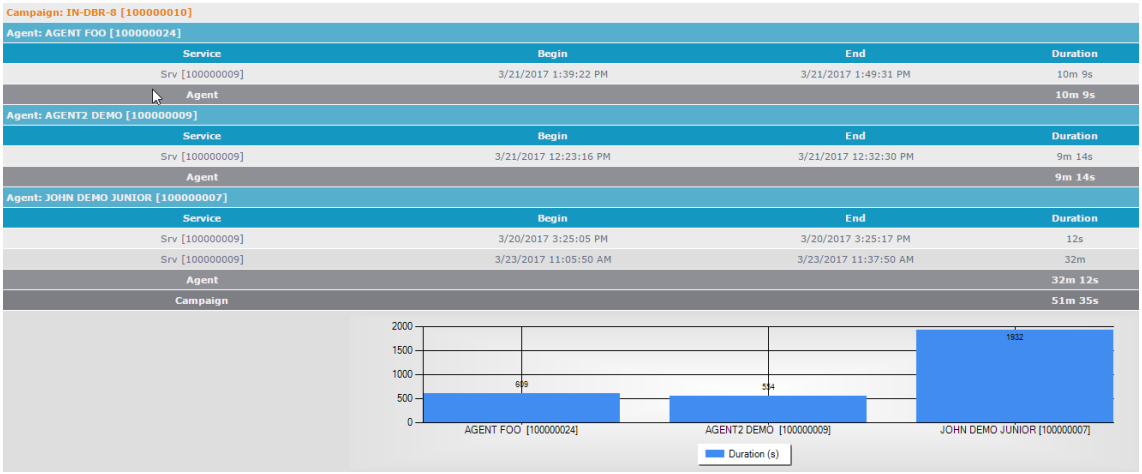
Agent: AGENT FOO [100000024]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/23/2017 3:23:40 PM	3/23/2017 3:24:40 PM	1m	2	[SIST] A la espera de que el agente p... [100000120]	48s
PT411	3/23/2017 3:26:28 PM	3/23/2017 6:06:53 PM	2h 40m 25s	2	[NDEF] Motivo de pausa no definido [100000119]	5m 25s
PT411	3/27/2017 9:36:16 AM	3/27/2017 9:40:52 AM	4m 36s	4	[NDEF] Motivo de pausa no definido [100000119]	1m 27s
Agent			2h 46m 1s	8		7m 40s

Agent: JOHN DEMO JUNIOR [100000007]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT410	3/23/2017 12:18:43 PM	3/23/2017 3:22:53 PM	3h 4m 10s	3	[NDEF] Motivo de pausa no definido [100000119]	3h 3m 2s
Agent			3h 4m 10s	3		3h 3m 2s
Service			5h 50m 11s	11		3h 10m 42s

- Agent participations, agent participation list in campaigns, clustering information per campaign and agent or vice versa.



Campaign: IN-DBR-8 [100000010]

Agent: AGENT FOO [100000024]

Service	Begin	End	Duration
Srv [100000009]	3/21/2017 1:39:22 PM	3/21/2017 1:49:31 PM	10m 9s
Agent			10m 9s

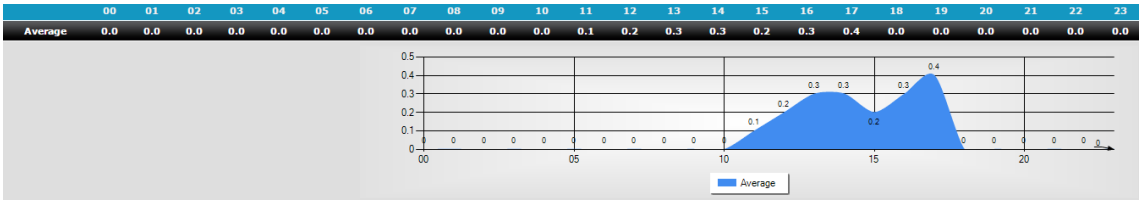
Agent: AGENT2 DEMO [100000009]

Service	Begin	End	Duration
Srv [100000009]	3/21/2017 12:23:16 PM	3/21/2017 12:32:30 PM	9m 14s
Agent			9m 14s

Agent: JOHN DEMO JUNIOR [100000007]

Service	Begin	End	Duration
Srv [100000009]	3/20/2017 3:25:05 PM	3/20/2017 3:25:17 PM	12s
Srv [100000009]	3/23/2017 11:05:50 AM	3/23/2017 11:37:50 AM	32m
Agent			32m 12s
Campaign			51m 35s

- Average distribution of agents in session, average number of agents in session in each time slot. In other words, for each time slot, the relation between the agent's session time within such time slot and its duration (60 min.) indicates the agent fraction that will be counted. For example: if between 10 and 11 the agent has been in session for 1 hour, it will account for 1 agent (=60 min. in session/60 min. time slot), but if they have been for 30 min, it will account for 0.5 agents (=30 min. in session/60 min. time slot). It can be clustered by service.



	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Average	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.3	0.3	0.2	0.3	0.4	0.0	0.0	0.0	0.0	0.0	0.0

7.5.7.4 AGENT PAUSE REASONS REPORTS

Detailed information about the agent pauses, including the reasons for such pauses.

There are five types of reports:

- Agent pauses, list of all pauses per agent, per service and agent and vice versa.

Services	Agents	Agent sessions	Starting date	Resolution date
All services	All agents	All	3/20/2017	NOW

Agent: AGENT FOO [100000024]

Service: [] SERVICE-4-OUT [100000020]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/23/2017 3:23:40 PM	3/23/2017 3:24:40 PM	1m	2	[SIST] A la espera de que el agente p... [100000120]	48s
PT411	3/23/2017 3:26:28 PM	3/23/2017 6:06:53 PM	2h 40m 25s	2	[NDEF] Motivo de pausa no definido [100000119]	5m 25s
PT411	3/27/2017 9:36:16 AM	3/27/2017 9:40:52 AM	4m 36s	4	[NDEF] Motivo de pausa no definido [100000119]	1m 27s
Service			2h 46m 1s	8		7m 40s

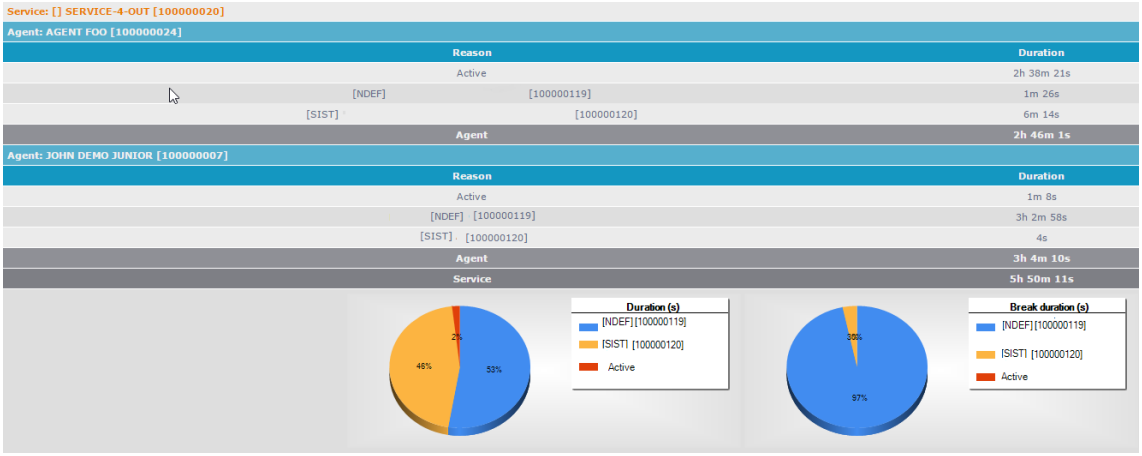
Service: Srv [100000009]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/21/2017 1:39:22 PM	3/21/2017 1:49:31 PM	10m 9s	1	Brk [100000052]	10m 9s
Service			10m 9s	1		10m 9s

Service: Srv [100000016]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/22/2017 5:24:44 PM	3/22/2017 5:51:55 PM	27m 11s	1	Brk [100000096]	27m 11s
Service			27m 11s	1		27m 11s
Agent			3h 23m 21s	10		45m

- Session pauses per reason: accumulation of time the agent allots to each pause reason; the active time has been included (the time the agent is in session minus the sum of all pauses), so the time the agent is active in relation to the amount of time they pause can be easily compared. It can be itemized per service and agent or vice versa. The first pie includes the active time, while the second only includes the pauses.



Service: [] SERVICE-4-OUT [100000020]

Agent: AGENT FOO [100000024]

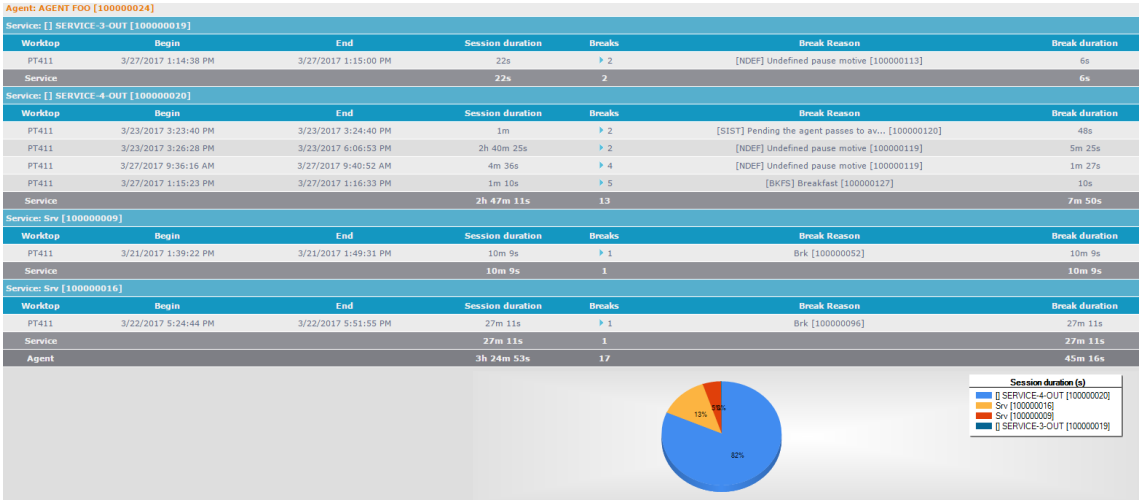
Reason		Duration
Active		2h 38m 21s
[NDEF]	[100000119]	1m 26s
[SIST]	[100000120]	6m 14s
Agent		2h 46m 1s

Agent: JOHN DEMO JUNIOR [100000007]

Reason		Duration
Active		1m 8s
[NDEF]	[100000119]	3h 2m 58s
[SIST]	[100000120]	4s
Agent		3h 4m 10s
Service		5h 50m 11s

- Session pauses per time: represents the total amount of time an agent has been on pause for a specific reason, and the average (such total divided by the number of sessions in which they have used that pause reason). It can be itemized by agent and pause reason and vice versa. The first

pie indicates the amount of time allocated between the pauses, while the second the average time distribution.



Agent: AGENT FOO [100000024]

Service: [] SERVICE-3-OUT [100000019]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/27/2017 1:14:38 PM	3/27/2017 1:15:00 PM	22s	2	[NDEF] Undefined pause motive [100000113]	6s
Service			22s	2		6s

Service: [] SERVICE-4-OUT [100000020]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/23/2017 3:23:40 PM	3/23/2017 3:24:40 PM	1m	2	[SIST] Pending the agent passes to av... [100000120]	48s
PT411	3/23/2017 3:26:28 PM	3/23/2017 6:06:53 PM	2h 40m 25s	2	[NDEF] Undefined pause motive [100000119]	5m 25s
PT411	3/27/2017 9:36:16 AM	3/27/2017 9:40:52 AM	4m 36s	4	[NDEF] Undefined pause motive [100000119]	1m 27s
PT411	3/27/2017 1:15:23 PM	3/27/2017 1:16:33 PM	1m 10s	5	[BKFS] Breakfast [100000127]	10s
Service			2h 47m 11s	13		7m 50s

Service: Srv [100000009]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/21/2017 1:39:22 PM	3/21/2017 1:49:31 PM	10m 9s	1	Brk [100000052]	10m 9s
Service			10m 9s	1		10m 9s

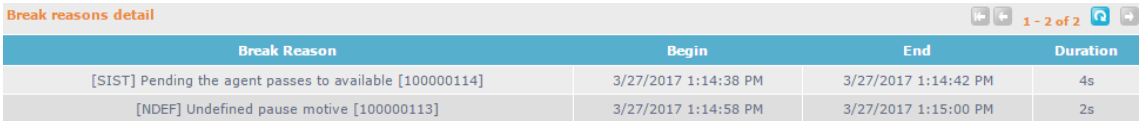
Service: Srv [100000016]

Worktop	Begin	End	Session duration	Breaks	Break Reason	Break duration
PT411	3/22/2017 5:24:44 PM	3/22/2017 5:51:55 PM	27m 11s	1	Brk [100000096]	27m 11s
Service			27m 11s	1		27m 11s
Agent			3h 24m 53s	17		45m 16s

- Average distribution of agents on pause: average number of agents on pause in each time slot. In other words, for each time slot, the relation between the agents on pause time within such time slot and its duration (60 min.) indicates the agent fraction that will be counted. For example: if between 10 and 11 the agent has been on pause for 1 hour, it will account for 1 agent (=60 min. on pause/60 min. time slot), but if they have been for 30 min, it will account for 0.5 agents (=30 min. on pause/60 min. time slot). It can be clustered by service.

	00	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
Average	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.1	0.2	0.3	0.3	0.1	0.0	0.1	0.0	0.0	0.0	0.0	0.0	0.0

- There is a list of pauses with the reasons and durations which can be accessed from the agent sessions report.



Break reasons detail 1 - 2 of 2

Break Reason	Begin	End	Duration
[SIST] Pending the agent passes to available [100000114]	3/27/2017 1:14:38 PM	3/27/2017 1:14:42 PM	4s
[NDEF] Undefined pause motive [100000113]	3/27/2017 1:14:58 PM	3/27/2017 1:15:00 PM	2s

7.5.8 LIST STATUS REPORTS

These reports provide an overview of the call center's pending workload.

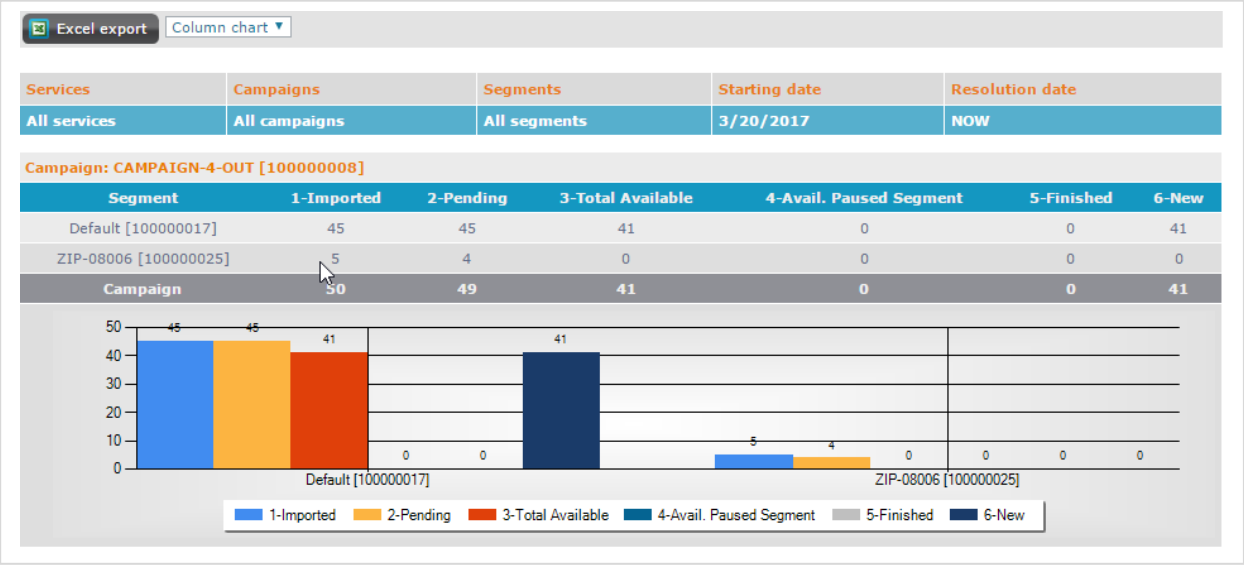
Report Results:

These reports will show the following data:

- **Uploaded**: Total number of records in the campaign list, for the filters applied.
- **Pending**: This counter provides an overview of the call center's pending workload, considering those records pending treatment (their status is 0).
- **Total available**: This counter provides an overview of the call center's pending workload because it only considers the records 'pending treatment,' which also comply with the temporary conditions[4]:

[4] The same temporary conditions as for being uploaded in the server record cache are considered: tNextContact, call_from, call_until, tStartValidity, tEndValidity.

- **Available in On-Hold Segments:** Record counter that, despite 'pending treatment' and complying with temporary conditions, will not be delivered because they do not belong to an active status segment.
- **Finised**: records whose status is 300-CLOSED.
- **New:** Records whose LastEndingid is NULL because they have never been processed.



Available Reports:

There are the following lists status reports:

- **Itemization per Campaign:** First, the campaign list complying with the filters is obtained. It displays counters per each campaign.
- **Itemization per Campaigns/Segments:** First, the campaign list complying with the filters is obtained. For each campaign, the segments list complying with the filters is obtained. It displays counters per each campaign/segment.
- **Progression per Campaign:** It displays the Omni+ over time of the lists status per campaign.
- **Progression per Campaign/Segments:** It displays the Omni+ over time of the lists status per each campaign/segment.
- **Progression per Segments:** It displays the Omni+ over time of the lists status per each segment of each campaign.

Meaning of the Filters per Service, Campaigns and Segments

Filters per service and per **campaign** allow limiting the campaigns for which a report is wanted.

If filtered per service, those campaigns that make up the service at the moment the report is run will be regarded.

The **filter per segment** is meaningful only if there has been a prior filter per a specific campaign. In case no campaign has been selected, this filter will display an error notice.

Meaning of Filters and Clusters as per Upload Date

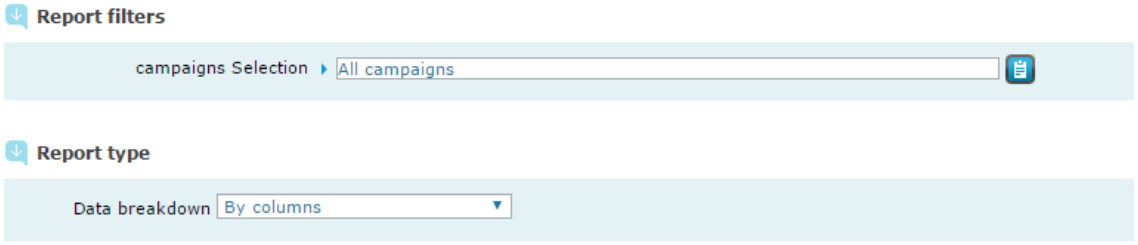
Filters and clusters per date refer to the "date in which the record was last uploaded," and they are based on the field tModification of the table tbCampaignSubjectIdentity.

Additional client Data Report

In addition to the reports described earlier, as of Omni+ 9.5, the following lists are available:

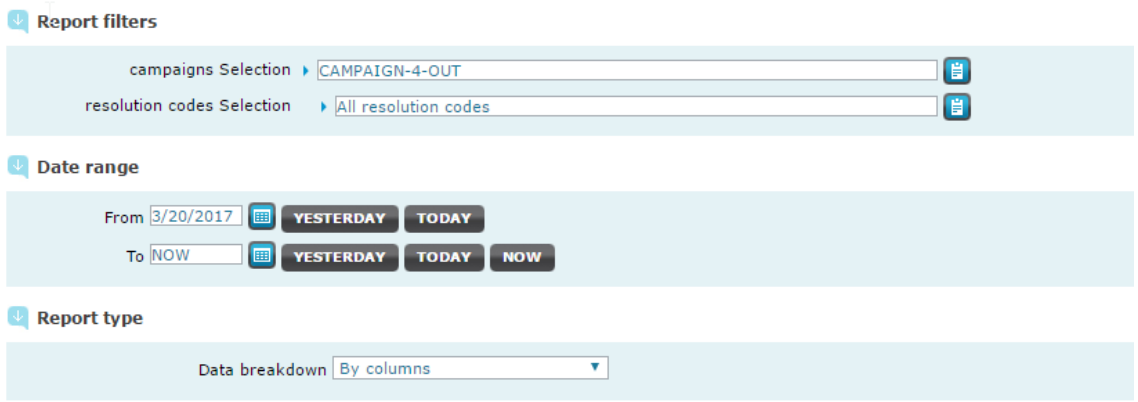
- Additional client Data List: displays all additional client data. This list allows verifying, for example, that the additional client data has been correctly uploaded and also allows verifying content.

  Selection fields for this list are:



- Listing of clients' additional data in finisched status: displays all additional client data, but only of those clients in finalized status and whose last call disposition and last transaction date is within the filters specified. This list allows obtaining information from the additional client data once they are finalized. Typically, the script has recorded the results of the interaction with the client in this additional client data.

  Selection fields for this list are:



8 WEBAGENT / IAGENT

8.1 GENERAL DESCRIPTION

This Windows application is installed in the agent's PC and provides a work environment for Omni+ users in the role of an agent. It is the clients' counterpart for the Omni+ server application.

Through this application, users can:

- Identify themselves in the system.
- Change their status to Available/Non-available.
- Perform screen telephone functions (CTI/Softphone SIP).
- Access applications and navigate their screens.
- Consult the contacts/sessions history.
- Start in-person management tasks.
- Learn about the campaign data in which they participate.

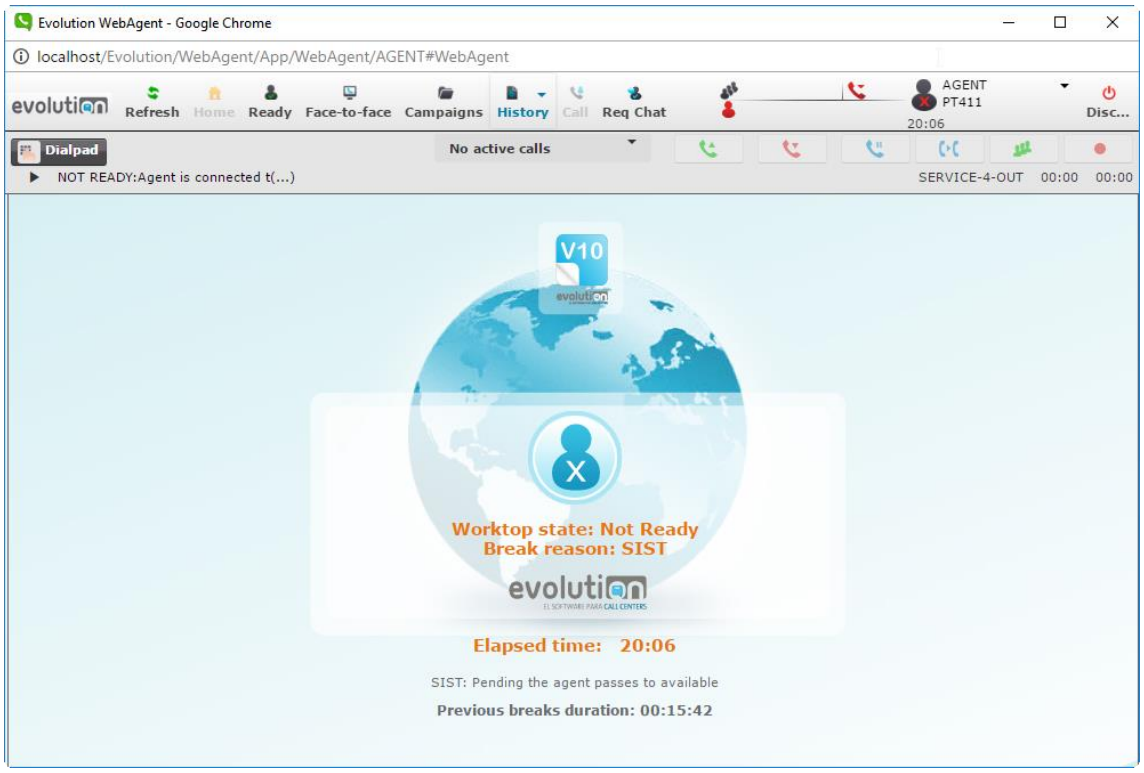
8.2 GRAPHIC ASPECT OF THE APPLICATION

WebAgent distributes the screen display in different main zones:

- Main navigation bar
- Telephony navigation bar
- Application and script work areas
- Information bar
- Integrated Softphone (only works with internet explorer > 9)

Other views activate upon agent request:

- Locator view
- Campaign information
- Management tasks/sessions history



Spanish	**English**
Navegación	Navigation
Estado del agente	Agent status
Información de las campañas	Campaign Information
Histórico de gestiones/sesiones	Management task/session history
Llamar en campaña	Call during campaign
Solicitar chat	Request chat
Pantalla completa	Full screen
Estado del agente	Agent status
Información de las colas	Queue Information
Control de telefonía	Telephone system control
Área de trabajo	Work area
Barra de información	Information bar

The system tray displays when the softphone is activated: 

8.2.1 FULL SCREEN DISPLAY

To optimize the desktop environment, the application can be visualized on "full screen" mode with the command FULL SCREEN:

FULL SCREEN The application is visualized on "full screen" mode. Only iAgent	View | Full screen	CTRL+F	

8.2.2 COMPACT MODE DISPLAY

To clear the desktop environment, the application can be visualized on "compact mode" with the command COMPACT MODE:

COMPACT MODE The application is visualized on "compact mode."	View | Compact mode	CTRL+R	

8.3 COMMAND-LINE PARAMETERS FOR IAGENT.EXE

iagent.exe admits specifying a series of modifiers through the command-line. In case a set up parameter is indicated through the command-line, this value will be taken, prevailing over the equivalent value set up in the Windows registry.

All these modifiers are **optional**. The following are the modifiers available:

- record: records the COM scripting interface

- unrecord: unrecords the COM scripting interface

- user name: specifies user

- **password**: specifies user password

- **worktop**: specifies the name of the worktop

- **ServerIpAddress=** : ip address for evoserver connection

- **ServerTcpPort=** : tcp port for evoserver connection

- **WebServerAddress=** : scripts server address

- **WebServerSite=** : website of the scripts server

Example:

```
iagent.exe -usuer=AGENT -password=AGENT -workstation=PT418 -
serveripaddress=192.168.0.100 -webserveraddress=192.168.0.101
```

8.4 REFERENCE OF USE FOR THE IAGENT APPLICATION

Commands can be accessed through the application **menu**

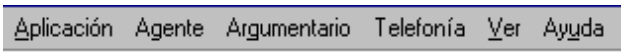


Figure 8.1 - Menu Bar

The most common actions can also be accessed through the tools bar menu **buttons** and the **rapid access keys** or "accelerators."

8.4.1 MAIN COMMANDS

The meaning of each icon on the tool bar of iAgent is described below:

COMMAND	MENU	ACC	BTN
START SESSION Displays the connection dialog, requesting username and password. If both are correct, the user is connected to iAgent.	Application | Start session		
END SESSION Disconnects the current user from the iAgent application.	Application | End session		
PRINT Prints the current page of the script/application.	Application | Print	F4	
LOGOUT Closes the active session (if any) and closes the application.	Application | Logout		
REFRESH Reuploads the application's current page in the application area. It must be used in case of script error, or if the data on screen has not been correctly refreshed.	Script | Refresh	F5	
HOME Goes back to the first page of the script. This icon appears deactivated if the session has not been started. It must be used in case of script error, or if the data on screen has not been correctly refreshed.	Script | Home	F6	

BACK Goes back to the previous page of the script. This icon appears deactivated if the session has not been started.	Script | Return	F7	
NEXT PAGE Goes to the next page of the script. This icon appears deactivated if the session has not been started.	Script | Next page	F8	
AVAILABLE Informs iAgent the user is available for new management tasks (inbound or outbound, as per the Omni+/Manager campaign set up).	Agent | Available	F9	
NOT AVAILABLE Informs iAgent the user is not available for new management tasks. If pause reasons have been defined for the service, it will be necessary to select the pause reason. The ACD status will change to ACD NOT AVAILABLE, so new calls will not be received. If this change is requested while the user is in an open management task, the change will not be carried out immediately, but—if possible—upon the end of the management task in progress.	Agent | Not available	F10	
IN-PERSON Starts a management task on in-person mode.	Agent | In-person channel	CTRL+F1	
CAMPAIGN INFO Shows the campaign information in which the agent participates.	Agent |Campaign information	CAN+ F1	
CAMPAIGN CALL Makes a campaign call.	Agent | Campaign call	F2	

REQUEST CHAT Requests chat with supervisor.	Agent | Request chat with supervisor		
ESTABLISH PASSWORD Allows modifying the user's password.	Agent | Establish password		
MANAGEMENT TASKS/ SESSIONS HISTORY Shows history information of the management tasks: the client's, the clients' with the agent, and the management tasks/sessions of the agent's DAY.	View | Contact history	CTRL+H	
If activated, it displays the tool bar.	View | Tool bar		
If activated, it displays the status bar at the bottom of the screen.	View | Status bar		
Shows or hides the identification text in each one of the buttons of the tool bar.	View | Show texts		
LOCATORS Shows locator list.	View locators	CTRL+L	
FULL SCREEN The application is visualized on "full screen" mode.	View | Full screen	CTRL+F	
COMPACT MODE The application is visualized on "compact mode."	View | Compact mode	CTRL+R	
HELP Shows information about the application version and set up parameters.	About iAgent...	F1	

8.4.2 TELEPHONE SYSTEM COMMANDS

COMMAND	MENU	ACC	BTN
KEYBOARD Shows the locator view, where a call can be made or redirected to a free number or another agent/supervisor or the center connected at the moment. If integrated Softphone is used, DTMF can be issued.	Telephone system | Keyboard	F11	
ANSWER Picks up the selected call in the call list, as long as the status is 'In Alert.'	Telephone system | Answer	CAN+ F11	
HANG UP Hangs up the selected call in the call list.	Telephone system | Hang up	F12	
PAUSE Pauses the selected call in the call list, as long as the status is 'Connected.'	Telephone system | Pause/retrieve	CAN+ F12	
RETRIEVE Activates the selected call in the call list, as long as the status is 'Paused.'	Telephone system | Pause/retrieve	CAN+ F12	
TRANSFER Transfers the call from "paused" to "active." To do this, there must be a 'paused' call and an 'active' call. If there are more than two calls, previously select one of the calls on hold in the call list.	Telephone system | Transfer	CTRL+F12	

CONFERENCE For Add-on conferences. To do this, there must be a 'paused' call and an 'active' call. The result is an add-on conference in which the interlocutors of the active call, of the call on hold and the agent himself participate. If there are more than two calls, previously select one of the calls on hold in the call list.	Telephone system |Conference	CTRL+F11	
RECORD Start/Stop conversation recording. For this, a call must be in progress and the campaign recording must be set up in Manual.	Telephone system | Record	CTRL+G	

8.4.3 QUEUE INFORMATION

The following information of the DBR campaigns that make up the service to which the agent is logged on is given:

FIELD	ICON	DESCRIPTION
QUEUED INTERACTIONS		Total number of current queued interactions.
ABANDONMENTS		Total number of abandonments produced during the day in progress.
MAXIMUM TIMEOUT		Time the oldest interaction has been in queue. It also indicates the campaign it belongs to. If the time approaches the queue timeout or the campaign service objective it will show orange, or if its equal or greater, red.

8.4.4 AGENT STATUS

The meaning of each icon of the iAgent status is described below:

STATUS	ICON	DESCRIPTION
DISCONNECTED		The user is not connected.
NOT AVAILABLE		The user is not available for the system to assign a contact. Pause, on break.
AVAILABLE		User is available to manage an incoming or an outbound contact .
PREVIEW		A management task has been assigned in Preview. The user has not started contact yet.
IN ACTIVE CALL		The user has an active contact.
IN CALL WAITING		The user has a contact on hold.
ADMINISTRATIVE TIME		The user has finalized a contact, but he/she still has not finished the management tasks.
ADMINISTRATIVE TIME (EXCEEDED)		The user has exceeded the maximum administrative time set up, but he still has not finished the management task.

8.4.5 WORKSTATION STATUS IN LOCATOR VIEW

The locator view displays the Omni+ user status when the drop-down menu is displayed.

The statuses are the following:

STATUS	ICON	DESCRIPTION
AVAILABLE		The agent is available to take the calls.
NOT AVAILABLE		The agent is not available to take the calls.
DEACTIVATED		The workstation is deactivated, no agent has started a session.

IN CALL		The agent has taken a call.
IN CALL WAITING		The agent has taken a call, but the call is on hold.
IN PREVIEW		The agent is in preview.
IN ADMINISTRATIVE TIME		The agent is in administrative time.

8.4.6 CALL STATUS IN CALL LIST

The call list in the navigation bar displays the status of the different calls known in the telephone terminal of the agent's workstation:

STATUS	ICON	DESCRIPTION
IN ALERT		The call is IN ALERT and has not been taken yet.
CONNECTED		The call has been established.
PAUSED		The call is on hold/paused.
FAILED		The call cannot progress for a certain reason: For example: CONNECTING, WRONG NUMBER, etc.
CAMPAIGN IN ALERT		A call in campaign is IN ALERT and has not been taken yet.
CONNECTED IN CAMPAIGN		A call in campaign is established.
PAUSED IN CAMPAIGN		A call in campaign is on hold/paused.
FAILED IN CAMPAIGN		A call in campaign cannot progress for a certain reason: For example: CONNECTING, WRONG NUMBER, etc.
UNKNOWN		The call status is unknown.

Calls that are not in campaign can be between agents or particular subjects.

8.4.7 CONTACT INFORMATION BAR

An information bar with the following fields can be seen at the bottom:

FIELD	CONTENT
CONTACT	Shows the current CONTACT information <TELEPHONE>:<NAME> <LASTNAME1> <LASTNAME2>
AGENT	Shows the agent's information <AGENT'S NAME> <AGENT'S last name>
CAMPAIGN	Shows the campaign name of the current contact: <CAMPAIGN NAME>
LOGIN	Shows the agent's login: <AGENT'S LOGIN>
WORKSTATION	Shows the workstation name: <WORKSTATION>
T.CALL	Call duration
T.ADMIN	Administrative time duration

8.4.8 RECENT ACTIVITY SUMMARY

To enable troubleshooting, the list of the last significant events occurred in the workstation can be displayed. Access is gained by double-clicking in the information area of the STATUS-BAR

8.5 USE OF OMNI+/IAGENT

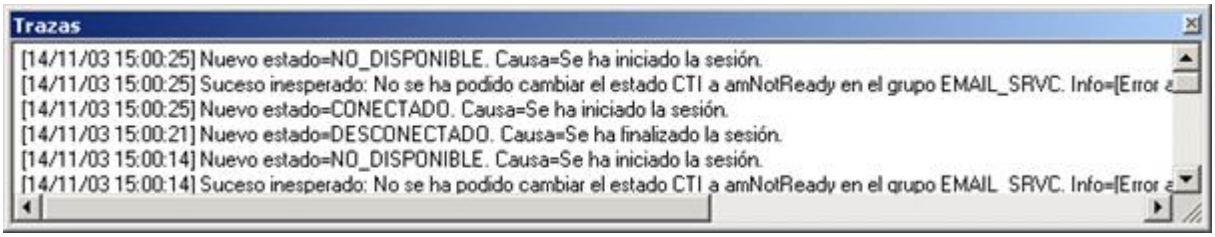
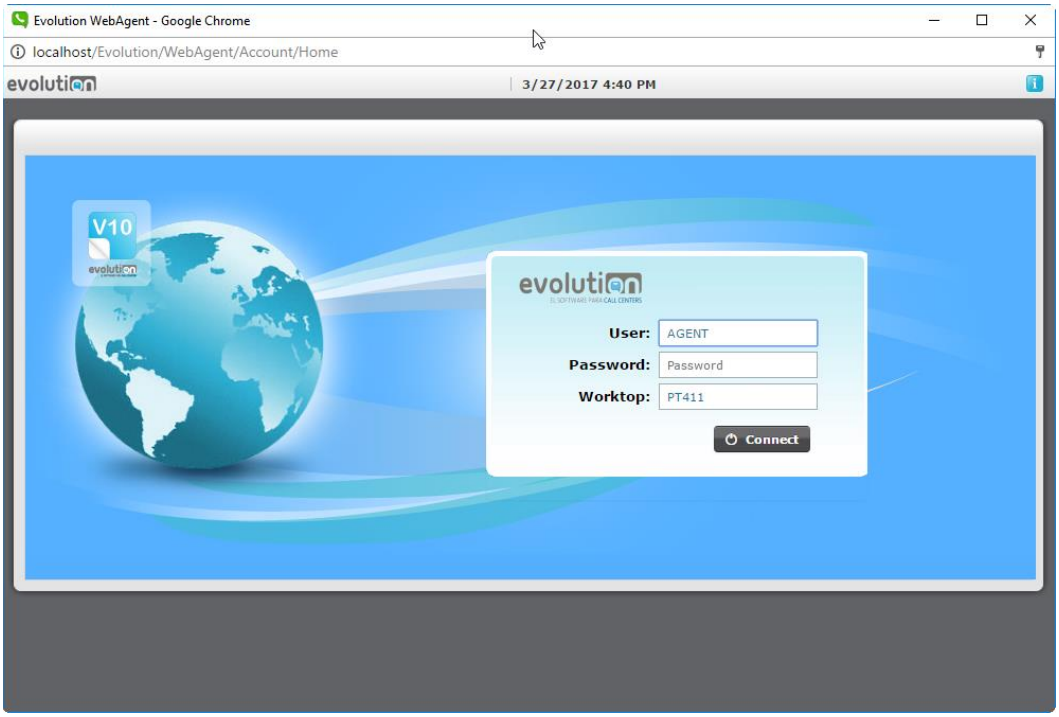


Figure 8.2 - Recent Activity

8.5.1 IDENTIFYING ONESELF IN THE SYSTEM

A user must start session in the system to work on the platform. "Agent"-type users can be recorded through iAgent.

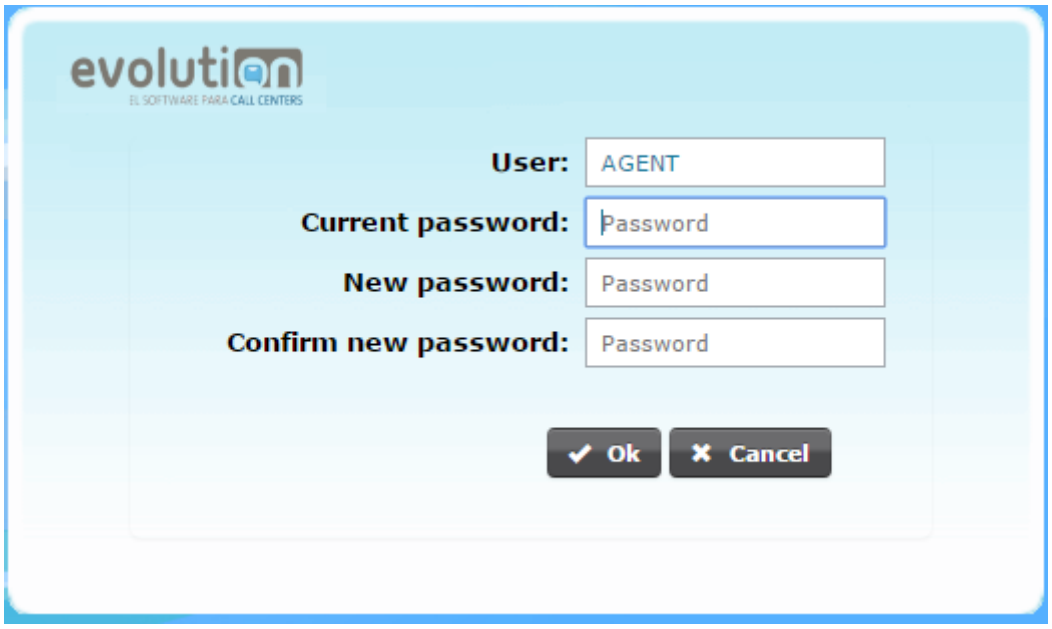
To do this, access the START SESSION command 0x1, which will display the dialog to introduce the log in and password (username and password).



FIELD	Description
User	Omni+ user
Password	Omni+ user password
Worktop	Omni+ worktop

Omni+ will verify that the values introduced are correct and will start session for the user in service assigned.

If the password has expired or the administrator has decided to change the password for the next session start, the user will be informed about this and a prompt screen to introduce the new password will appear.



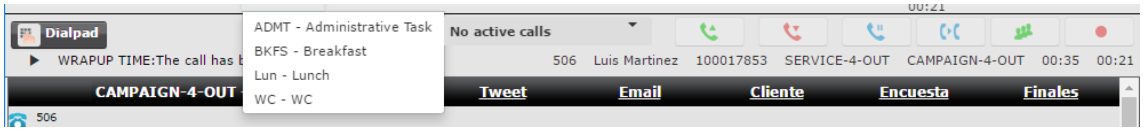
The user password can also be modified once the session has been started through the menu option Agent | Establish password.

From that moment, the work environment of the agent user will be that of the service assigned, in case the agent has been assigned a sole service, and will participate in that service campaigns. If the agent has been assigned more than one service, a prompt screen will appear for the agent to choose the service in which he wants to participate. If one or more service campaigns are telephone, the corresponding ACD LOGIN will take place in the telephone terminal, with the parameters ACD LOGIN and ACD PASSWORD defined in the Omni+/Manager set up for that agent.

> The session start can be denied for various reasons:
>
> The user has already started a session in another workstation
>
> The workstation is being used by the same or another user

8.5.2 BREAK AND DISCONNECTION REQUEST

If the agent needs to have a break during operations, he/she must request the NOT AVAILABLE status and indicate, in cases there are pause reasons defined for the service, the pause reason. If a management task is in progress, he/she must first finish it.



To request disconnection, the user must finish the management task in progress, if any, be in NOT AVAILABLE status and use the command END SESSION .

Ending a session is not allowed if...

...the user has a management task open which has not ENDED yet.

...or if the user is on AVAILABLE mode.

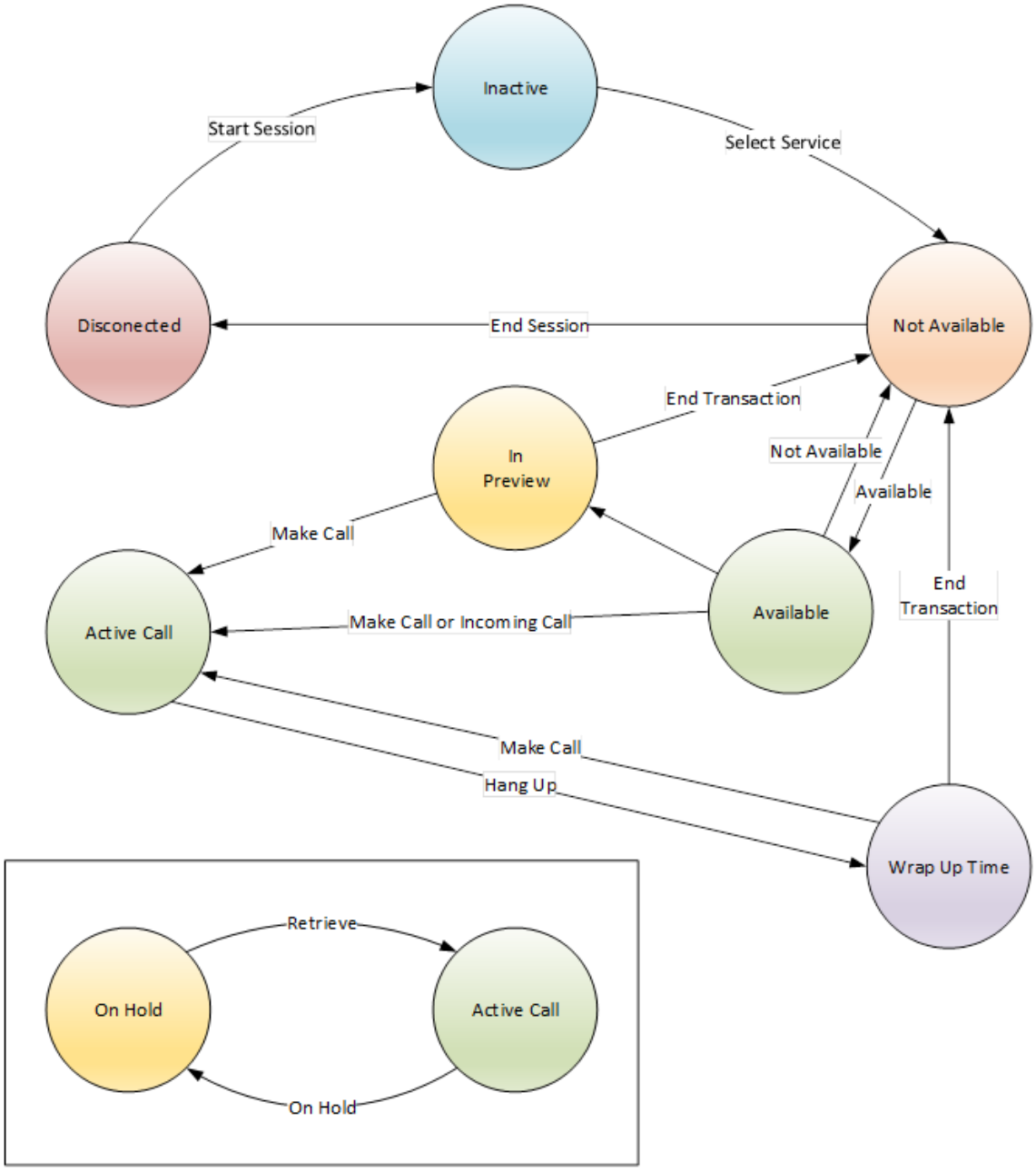
If END SESSION is requested, then an error notice will appear.

It is not recommended to make pauses leaving a management task in progress without call disposition because statistics become distorted. In addition, and if the pause is very long, some applications in the "work area" can lose data when the ASP.NET session expires. 5

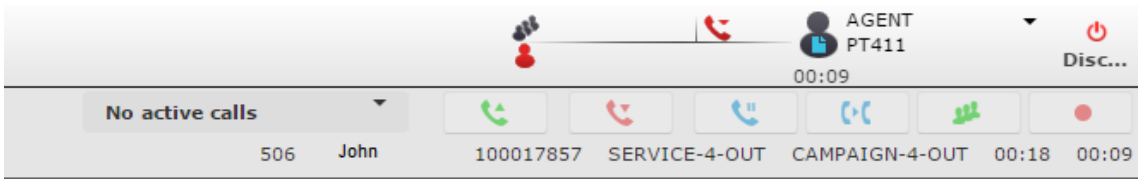
8.5.3 AGENT STATUS

During normal operations, the agent user can go through different statuses. A status life cycle model is as follows:

5 Typically, the time-out value is 20 minutes



The status which the agent is in is indicated by the icon on the right side of the navigation bar.



The meaning of the different statuses is the following:

STATUS	ICON	DESCRIPTION
DISCONNECTED		The user is not connected.

NOT AVAILABLE		The user is not available for the system to assign a contact. Pause, on break.
AVAILABLE		User is available to manage an incoming or an outbound contact.
PREVIEW		A management task has been assigned in Preview. The user has not started contact yet.
IN ACTIVE CALL		The user has an active contact.
IN CALL WAITING		The user has a contact on hold.
ADMINISTRATIVE TIME		The user has finalized a contact, but he/she still has not finished the management tasks.
ADMINISTRATIVE TIME (EXCEEDED)		The user has exceeded the maximum administrative time set up, but he still has not finished the management task.

8.5.4 AVAILABLE/NOT AVAILABLE

The agent can request to be AVAILABLE or NOT AVAILABLE through the associated commands:

AVAILABLE. Informs iAgent the user is available for new management tasks (inbound or outbound, as per the Omni+/Manager campaign set up).	Agent | Available	F9	
NOT AVAILABLE Informs iAgent the user is not available for new management tasks. If pause reasons have been defined for the service, it will be necessary to select the pause reason. The ACD status will change to ACD NOT AVAILABLE, so new calls will not be received.	Agent | Not available	F10	

If this change is requested while the user is in an open management task, the change will not be carried out immediately, but—if possible—upon the end of the management task in progress.			

The request for AVAILABLE allows the Omni+ server to determine which is the next activity, based on the service and campaign set up and on their dial-up modes or priorities.

The request for NOT AVAILABLE can be made as long as there is a management task in progress, although change will not be granted until the management task is finished.

8.5.5 EXAMPLE OF AN AGENT'S STATUS CYCLE

A regular cycle is as follows:

DESCRIPTION	STATUS
The user is not connected.	DISCONNECTED 
The agent STARTS SESSION correctly. The initial status is NOT AVAILABLE and Omni+ performs the ACD LOGIN in the workstation's telephone terminal. The ACD status is also NOT AVAILABLE.	NOT AVAILABLE 
The user uses the AVAILABLE command 0x1 to start a management cycle. It will remain in this status until the system can offer an inbound management task (For example: an ACD queued call, an e-mail, etc.) or an outbound management task (For example: issuing calls, e-mails, etc.)	AVAILABLE 
If a new contact is received, Omni+ starts a new management task and the user's status will reflect the contact's status every moment: PREVIEW, IN ACTIVE CALL, or IN CALL WAITING.	PREVIEW  IN ACTIVE CALL

	 IN CALL WAITING 
When the contact (not the management) ends, the agent is considered in administrative time.	ADMINISTRATIVE TIME 
If the user exceeds the administrative time established by the administrator, the icon will blink.	ADMINISTRATIVE TIME (EXCEEDED) 
The agent ends the management task by running a Call disposition in the application from the application's "work area." This way the corresponding actions associated to the Call disposition are executed (For example: new contact callback) and Omni+ can END the management task in progress. The new agent status can now be AVAILABLE or NOT AVAILABLE, depending on the mode set up of the next Omni+/Manager management task.	AVAILABLE  NOT AVAILABLE 
If the user wishes to make a pause or disconnect, he /she can request the command NOT AVAILABLE. In case there are pause reasons that have been defined for the service, it will be necessary to select the pause reason.	NOT AVAILABLE 

This cycle is an example since an agent status is determined by factors such as:

- Receiving or making a call
- Ending a call
- Running a call disposition in the application, within the "work area."

8.5.6 MANAGEMENT TASK START AND END

The start of a management task can be caused by various reasons:

- The reception of an inbound contact (a telephone call, an e-mail, etc.)
- The Omni+ platform determines what is necessary to start an outbound management task, in any of the call issue modes (For example: a management task is started in the Preview mode)
- The agent user starts a management task voluntarily, in in-person mode

A management task that has been started must be end with a call disposition mandatorily through the "work area," which displays the specific application associated with the campaign.

While the user has a management task open that has not been ended, Omni+™ will not deliver new management tasks and the telephone status will remain ACD NOT AVAILABLE to avoid receiving new calls.

> It is necessary to END all management tasks through the "work area" before starting the new cycle of a new management task.

8.5.7 AUTOMATIC TREATMENT OF NON-CLOSED MANAGEMENTS TASKS

If for any reason the application is disconnected or closed while a management task is in progress, some application data in the work zone can be lost, and the management task will be treated in the following way:

- If it is a call issue management task, it will be offered to the agent again if he/she reconnects to the system before 24 hours.
- If the management task is not a call issue or the agent does not reconnect before 24 hours, the system will automatically close it with a system call disposition.

8.5.8 TELEPHONE FUNCTIONS

Telephone functions can be performed in the CTI screen through the different application commands, such as:

- KEYBOARD
- ANSWER
- HANG UP
- PAUSE
- RETRIEVE
- TRANSFER
- CONFERENCE
- RECORD

These actions can be performed through the telephony navigation bar

Telephony Navigation Bar

8.5.9 TELEPHONE COMMANDS ON SCREEN

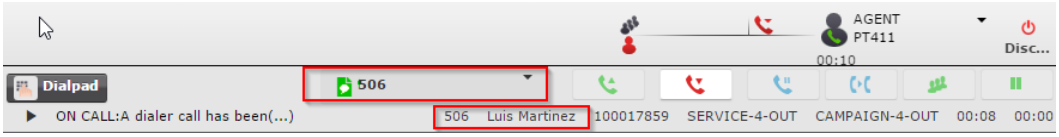
The available commands are:

COMMAND	MENU	ACC	BTN
KEYBOARD Shows the locator view, where a call can be made to a free number or another agent/supervisor or the center who is connected at the moment.	Telephone system | Keyboard	F11	
ANSWER Picks up the selected call in the call list, as long as the status is 'In Alert.'	Telephone system | Answer	CAN+ F11	
HANG UP Hangs up the selected call in the call list.	Telephone system | Hang up	F12	
PAUSE Pauses the selected call in the call list, as long as the status is 'Connected.'	Telephone system | Pause/retrieve	CAN+ F12	
RETRIEVE Activates the selected call in the call list, as long as the status is 'Paused.'	Telephone system | Pause/retrieve	CAN+ F12	
TRANSFER Transfers the call from "paused" to "active." To do this, there must be a 'paused' call and an 'active' call. If there are more than two calls, previously select one of the calls on hold in the call list.	Telephone system | Transfer	CTRL+F12	
CONFERENCE For Add-on conferences. To do this, there must be a 'paused' call and an 'active' call.	Telephone system |Conference	CTRL+F11	

The result is an add-on conference in which the interlocutors of the active call, of the call on hold and the agent himself participate. If there are more than two calls, previously select one of the calls on hold in the call list.			
RECORD Start/Stop conversation recording. For this, a call must be in progress and the campaign recording must be set up in Manual.	Telephone system | Record	CTRL+G	

8.5.10 CALL DROPDOWN LIST

The telephone associated with the workstation can have one or several calls at a given time. These calls appear in the drop-down list in the telephony navigation bar.



Icon indicating current status

For each call, the call status and the interlocutor's phone number are shown, if available through CTI.

In case there is more than one call, it is possible to select one of them with this drop-down menu.

> Normally, each call is in a different status (For example: an active call and a call on hold), so the available telephone commands change when selecting one or the other call.

8.5.10.1 CALLS TO OTHER WORKSTATIONS

Center locators allows contacting another Omni+ user or other arbitrary telephones by phone.

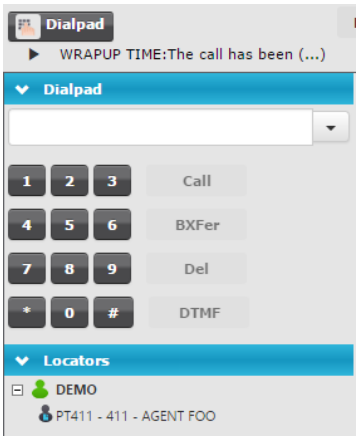
The locator view can be accessed with the command LOCATORS:

LOCATORS Shows locator list	View locators	CTRL+L	

The locator view displays Omni+ users recorded in the system.

Locators appear clustered by their workstation type. This workstation type is defined through the OMNI+/Manager administration and supervision application.

The person of the center we wish to contact can also be localized through the panel's drop-down list.



Locate an agent of the center

By clicking with the right button of the mouse on the locator view, the context menu will appear with the options call, redirect and order by... It is possible to order the list by Agent, Workstation or Telephone.

Once the person has been localized, double click on the name or click with the right button of the mouse to select the option Call from the context menu.

The locator icon displays the workstation status:

STATUS	ICON	DESCRIPTION
AVAILABLE		The agent is available to take the calls
NOT AVAILABLE		The agent is not available to take the calls
DEACTIVATED		The workstation is deactivated, no agent has started a session
IN CALL		The agent has taken a call
IN CALL WAITING		The agent has taken a call, but the call is on hold
PREVIEW		The agent is in preview
ADMINISTRATIVE TIME		The agent is in administrative time

The status shown corresponds to the workstation status when opening the locator view.

If the locator view remains open, this information is not updated.

8.5.10.2 FREE SELECTION CALLS

Through the Locator view, a free selection number can be called by pressing the numbers on the computer keyboard or using the telephone keyboard of the locator panel and then on the Call button.

The last numbers introduced are stores in the drop-down menu where numbers are introduced.

This function can be disabled through the service set up with the parameter 'Enable telephone keyboard.'

8.5.10.3 REDIRECTING CALLS (BLIND TRANSFERS)

Through the locator view, we can also REDIRECT (blind transfer) the selected call in the drop-down call menu to a free selection number can be called clicking the numbers on the computer keyboard or using the telephone keyboard of the locator panel and then on the Redir button.

If no call has been selected, the button will be disabled.

8.5.10.4 DTMF

If the integrated softphone is used, the send DTMF through the active call function will be available. If no active call has been selected, the button will be disabled.

When activating the DTMF mode, the button will be pressed until pressed again to exit such mode or until the panel is closed.

On DTMF mode, the digits introduced will be sent immediately.

8.5.10.5 CAMPAIGN CALLS

With outbound calls, it is the system which—whether upon agent request or automatically—takes the initiative to call the client.

The Preview and Auto Preview mode indicate there are outbound calls. The agent, from the integration application (script,) obtains the file of the next client to contact.

- If the agent decides when to make the phone call, we speak of Preview.
- If the system automatically makes the call when the agent receives the client file, we speak of Auto Preview.
- The progressive mode indicates that the automatic dial-up system used to make calls, transfer agents the calls they have answered—simultaneously transferring the corresponding client file—and automatically manage the calls that end with a telephone incident is being used (connecting, no answer, fax, etc.).
- The predictive mode is similar to the progressive mode, but the system makes the calls considering the time the agent will take to end the current call.

While the agent has an open management task, he/she can start a call with the client with the command CAMPAIGN CALL.

CAMPAIGN CALL Makes a campaign call	Agent | Campaign call	F2	

The call is made to the telephone number stored in the Omni+ database, TELEPHONE field of the client table.

8.5.11 SEARCH FORM

By default, in an outbound call or in-person management task, Omni+ starts the transaction associating also subject 0, also called anonymous subject. client identification through a search allows Omni+ to identify the client, associate the transaction to such clients and, as of that moment, from the script, the Omni+ or business data become accessible and can be submitted to the agent. Two scenarios where having this search function can be useful have been identified:

- When taking an inbound call.
- When starting an in-person management task.

The "In-person Management Task" function is activated when the agent is "Not available," that is, when an operated chooses to perform an in-person management task, he/she cannot serve other calls.

The procedure to perform an in-person management task is the following:

- The agent goes to "Not available" or is in a private call.
- He/she requests a management task in an in-person channel.
- He/she select one of the service campaigns in which the agent participates and which hat the in-person channel activated. In case there is only one campaign, it will be selected automatically.
- The search form screen appears. Different fields can be filled out in it. It will load automatically and search the telephone with which there is a contact.
- The client search will be performed in the campaign selected in the previous steps and the client list will display.
- Once the matching record or records are located with the search criterion selected, the form will show the data of each one of the clients and will allow performing the following tasks:
    - Identify Client
    - Change or refine search criteria
    - Cancel search process

For an inbound call, the process is the same, only that the search form will appear—if set up in the corresponding campaign—simultaneously with the inbound call.

Four function modes can be set up in terms of how to display the search form:

- Do not display the form in any case.

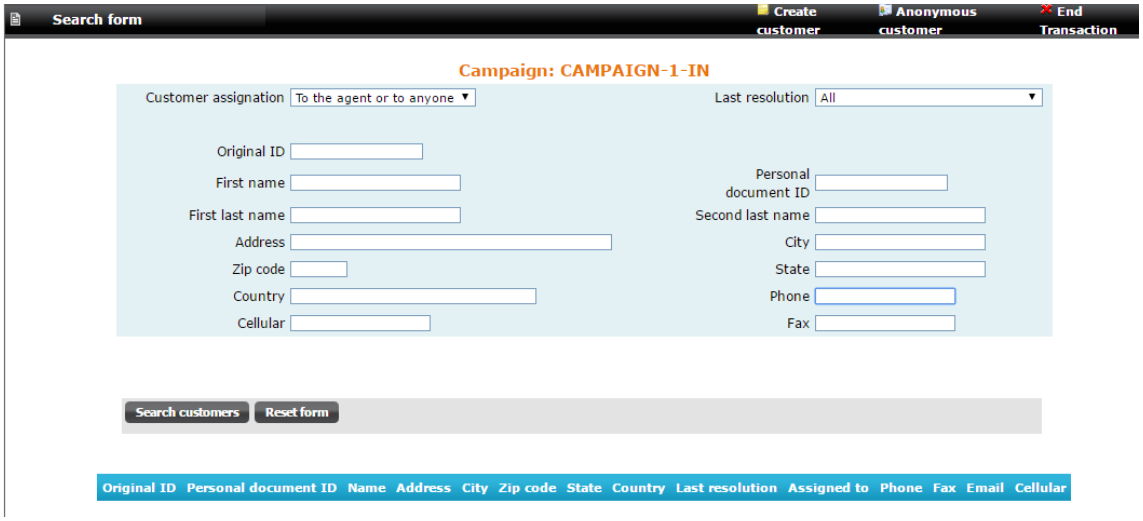
- Display the form in inbound calls.
- Display the form in in-person management tasks.
- Display the form both for inbound calls as for in-person management tasks.

These function modes are set up at campaign level, through the Manager application, in the "Identify Client" field.

The search form is divides in two parts:

- Search criteria selection area
- Results area

Search criteria selection:



Search fields. The form will comprise the following search fields:

- "Assigned records" combo (to the agent/the Group/the agent of the group [by default])
- Last call disposition. Combo with the description of call dispositions (loaded with the call dispositions associated to the current campaign). By default, all call dispositions are selected (Last call dispositions =All).
- Client Identifier
- Name
- Last name
- Last name
- Tax Identification Number
- Address
- Town
- Zip code
- Country
- Telephone

  - Mobile
  - Fax
  - E-Mail

- In the text search fields, the * (asterisk) can be specified as a wildcard. For example, the search for all clients whose first last name starts with RODRIG will be specified as RODRIG*.

- It can be that some searches need a considerable amount of time, so the user is responsible for refining the search criteria as much as possible to minimize the access time to the database.

- If various search criteria are introduced, it is understood that all of them should be complied with to show in the list.

- All records complying with the search criteria will be shown; however, a client cannot be eligible as per the circumstances in each case. In sum, the following situations will be identified:
  - A client belonging to a paused segment.
  - A client out of the contact time range (Call_from/Call_until).
  - A client who is not available (for example, deregistered or being managed by another agent).

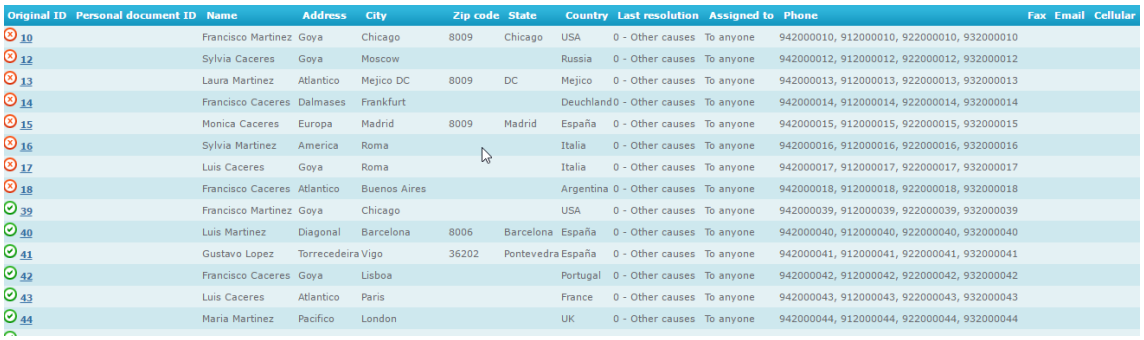
- The search is limited to 25 records. If there is more, it must be notified so the search is refined.

- Records are displayed in the results area. In case these records cannot be shown on the screen, a vertical scrollbar will be available.

- Available buttons on this screen:
  - Search client: searches clients and displays a list in the results area.
  - Clean form: deletes all search criteria previously introduced.
  - New client (only if the campaign allows registering new clients): a form is displayed that enables registering data of an Omni+ client.
  - Anonymous client (only if the campaign allows anonymous): navigates the first page of the script with the anonymous client.
  - End: Ends the current management task with a system call disposition of the type "Discarded by user."

Results Area:

The results area is the part of the page used to display client data which complies with the search conditions previously specified. Since it is the same search page, the criteria used can also be seen.

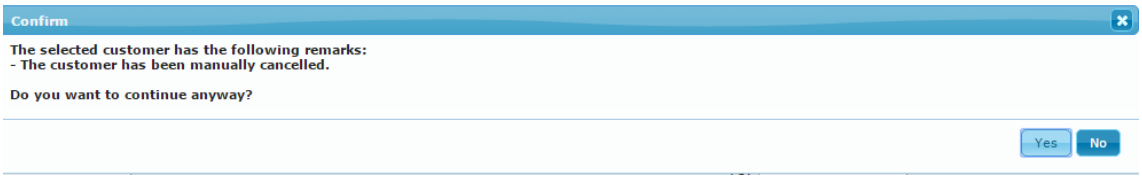


Original ID	Personal document ID	Name	Address	City	Zip code	State	Country	Last resolution	Assigned to	Phone	Fax	Email	Cellular
10		Francisco Martinez	Goya	Chicago	8009	Chicago	USA	0 - Other causes	To anyone	942000010, 912000010, 922000010, 932000010			
12		Sylvia Caceres	Goya	Moscow			Russia	0 - Other causes	To anyone	942000012, 912000012, 922000012, 932000012			
13		Laura Martinez	Atlantico	Mejico DC	8009	DC	Mejico	0 - Other causes	To anyone	942000013, 912000013, 922000013, 932000013			
14		Francisco Caceres	Dalmases	Frankfurt			Deuchland	0 - Other causes	To anyone	942000014, 912000014, 922000014, 932000014			
15		Monica Caceres	Europa	Madrid	8009	Madrid	España	0 - Other causes	To anyone	942000015, 912000015, 922000015, 932000015			
16		Sylvia Martinez	America	Roma			Italia	0 - Other causes	To anyone	942000016, 912000016, 922000016, 932000016			
17		Luis Caceres	Goya	Roma			Italia	0 - Other causes	To anyone	942000017, 912000017, 922000017, 932000017			
18		Francisco Caceres	Atlantico	Buenos Aires			Argentina	0 - Other causes	To anyone	942000018, 912000018, 922000018, 932000018			
39		Francisco Martinez	Goya	Chicago			USA	0 - Other causes	To anyone	942000039, 912000039, 922000039, 932000039			
40		Luis Martinez	Diagonal	Barcelona	8006	Barcelona	España	0 - Other causes	To anyone	942000040, 912000040, 922000040, 932000040			
41		Gustavo Lopez	Torrecedeira	Vigo	36202	Pontevedra	España	0 - Other causes	To anyone	942000041, 912000041, 922000041, 932000041			
42		Francisco Caceres	Goya	Lisboa			Portugal	0 - Other causes	To anyone	942000042, 912000042, 922000042, 932000042			
43		Luis Caceres	Atlantico	Paris			France	0 - Other causes	To anyone	942000043, 912000043, 922000043, 932000043			
44		Maria Martinez	Pacifico	London			UK	0 - Other causes	To anyone	942000044, 912000044, 922000044, 932000044			

- The client list displays as a table that displays the following client data:
  - OriginalId
  - Tax Identification Number
  - Complete name (name and last name cluster)
  - Address
  - City
  - Zip code
  - State
  - Country
  - Last resolution
  - Assigned to: {agent/group}
  - Telephone
  - Mobile
  - Email
  - Fax

- The first column in the table (client identifier) is a clickable link. Together with this link an icon indicating if the client is eligible or not will be displayed. If the mouse is placed on the icon indicating that the client is not eligible, a message with the reason can be seen. By clicking on the client identifier client eligibility can be verified. The conditions verified are the following:
  - The client belonging to a paused segment.
  - The client is out of the contact time range (Call_from/Call_until).
  - The client has a transaction in progress.
  - The client is in a final status (System Deregistration, Manual Deregistration, Closed, etc.).

- When the client is not eligible, a notice appears:

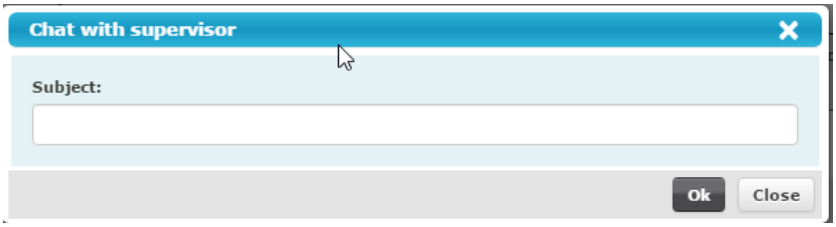


  The option "Accept" displays (identify client despite the notice) or "Cancel" (back to the search form).

- If the client is eligible or it has been confirmed that contact with him/her is sought, the system identifies the client and navigates to the first page of the script.

8.5.12 REQUEST CHAT WITH SUPERVISOR

If the agent needs to consult a supervisor, he/she can request a chat by clicking on "Req.chat" and indicating the chat subject.



Once the chat is requested, all service supervisors connected to Manager will receive a chat request notice, so that any of them can start a chat session with the agent.

8.5.13 INTEGRATED SOFTPHONE

iAgent/WebAgent integrates a SIP softphone. To use it, the workstation and SIP server must be adequately set up, and the campaigns must have a DBR routing.

The softphone will activate once the agent has logged in to a service. Its functions can be accessed through the iAgent interface: call, hang up, transfer...

The system tray displays the icon indicating that the softphone is being used. By clicking on the right button, the context menu appears with the following options:

- **Set up: where audio devices the agent will use can be determined. Root privileges are needed to change this set up.**
  - Microphone: to speak
  - Speaker: to listen
  - Tone: to listen to the tone for incoming calls

By default, the softphone is set up to be used with predetermined reproduction and recording devices of the operating system.

> We recommend setting up the reproduction and recording devices to be used with the softphone, like the Windows default devices, and not modifying the softphone set up predetermined.

- **Refresh record: allows forcing the softphone's record refresh in the SIP server. Usually, this function will not be necessary.**
- **silences the agent's microphone. It can be activated only when there is a call in progress and deactivates automatically once a call is ended. It can be activated using the menu or double-clicking on the icon.**
- **About EvoPhone: program version information.**

The softphone icon displays the status; if the mouse pointer is placed on the icon, the tooltip indicating the status will be seen:

STATUS	ICON	DESCRIPTION
ONLINE		The softphone is connected to the SIP server and the audio is active.
OFFLINE		The softphone cannot connect to the SIP server.
ONLINE MUTE		The softphone is connected to the SIP server and the microphone is deactivated.

> When the softphone cannot connect to the SIP server, the agent cannot connect to the service.
>
> If the softphone disconnects from the SIP server, the agent will become "Not available," and the status cannot be changed until the SIP server connection is recovered.

The recording, depending on the workstation set up, will be carried out from the softphone itself or from the server.

8.6 ACCESS TO APPLICATIONS AND NAVIGATION

When a new management task is started, the "work area" navigates to the first page of the application or script associated with the corresponding campaign.

This application or script is defined through the Omni+/Developer™ tool or through external tools, so they can be fully specific to the needs of the call center.

The agent user must interact with this application through the "work area." The management task ENDING must be run through the commands in the specific application itself. All applications must comprise at least one ENDING command.

When the ENDING corresponding to the Omni+/iAgent application is run, the associated management task can be closed, and the ADMINISTRATIVE TIME ended.

If there is a call when running an ENDING, it will be hanged up to prevent the call from surviving the associated management task.

Omni+/iAgent allows certain navigation commands to facilitate the quick access to certain screens:

REFRESH Reuploads the application's current page in the application area. It must be used in case of script error, or if the data on screen has not been correctly refreshed.	Script | Refresh	F5	
HOME Goes back to the first page of the script. This icon appears deactivated if the session has not been started. It must be used in case of script error, or if the data on screen has not been correctly refreshed.	Script | Home	F6	
BACK Goes back to the previous page of the script. This icon appears deactivated if the session has not been started.	Script | Return	F7	
NEXT PAGE Goes to the next page of the script. This icon appears deactivated if the session has not been started.	Script | Next page	F8	

Take into account that running navigation these commands can trigger the loss of information from the initial screen.

8.7 MANAGEMENT TASKS HISTORY

The agent can consult different management tasks histories:

- Client management tasks (with any agent)
- Client management tasks with the agent himself
- Agent management tasks (with any client)
- Agent sessions

MANAGEMENT TASKS/SESSIONS HISTORY Shows history information of the management tasks: the client's, the client's with the agent, and the management tasks/sessions of the agent's DAY.	View | Contact history	CTRL+H	

A client's management task history is only available as long as there is an open management task with a client identified in the application.

If there is no active management task, only the agent's history can be consulted.

8.8 IN-PERSON MODE MANAGEMENT TASK

A management task can be started on demand running the IN-PERSON command. To run this command, the agent must finalize the current management tasks and be NOT AVAILABLE on in a PRIVATE CALL.

IN-PERSON Starts a management task on in-person mode.	Agent | In-person channel	CTRL+F1	

The IN-PERSON command displays a campaign list for which the in-person channel has been made available through Omni+/Manager.

The agent must select one of the campaigns available or close the window with the command IN-PERSON.

If there is only one campaign, the system will automatically select it.

If one of the Omni+™ campaigns is chosen, a new management task for that campaign will be started.

8.9 CAMPAIGN INFORMATION

The campaign parametrization in which the agent is participating can be consulted with the command CAMPAIGN INFO:

CAMPAIGN INFO Shows the campaign information in which the agent participates.	Agent |Campaign information	CAN+ F1	

8.10 CONTACT INFORMATION

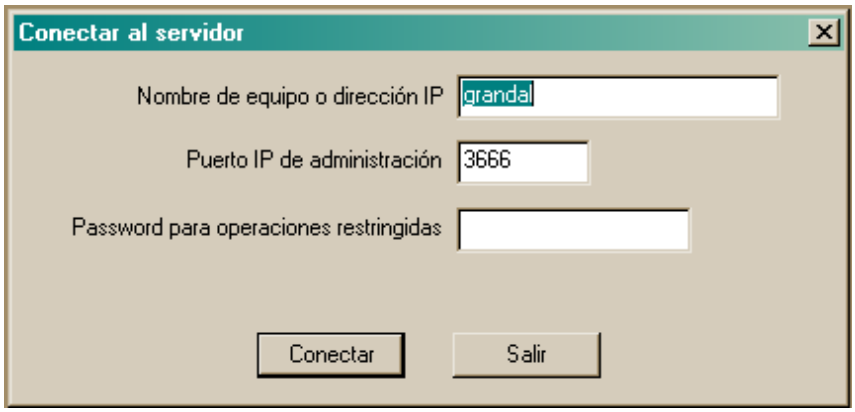
CONTACT INFORMATION can be consulted in the information bar at the bottom of the screen.

See "Contact information bar"

9 SERVER ADMINISTRATION WITH OMNI+/ADMIN

Omni+/Admin allows configuring Omni+ remotely and to monitor its status.

The program starts after the user presses the connection button (the only one active at startup). After this, the connection dialogue appears:



The standard value for the TCP port is 3666.

The password requested is the Omni+ administrator password which may be entered or not. If we decide to enter the password, we can access operations which otherwise would be restricted.

> Without the password, the user can only read the configuration and monitor the server, but never execute commands or save configuration changes. The default password is "admin," without the quotation marks, but could be changed by this same application.

If an invalid password is entered, ServerAdmin displays the message: "Received response of <CheckAdministratorPassword> with negative results." In this case the user may continue running the program but in read only mode.

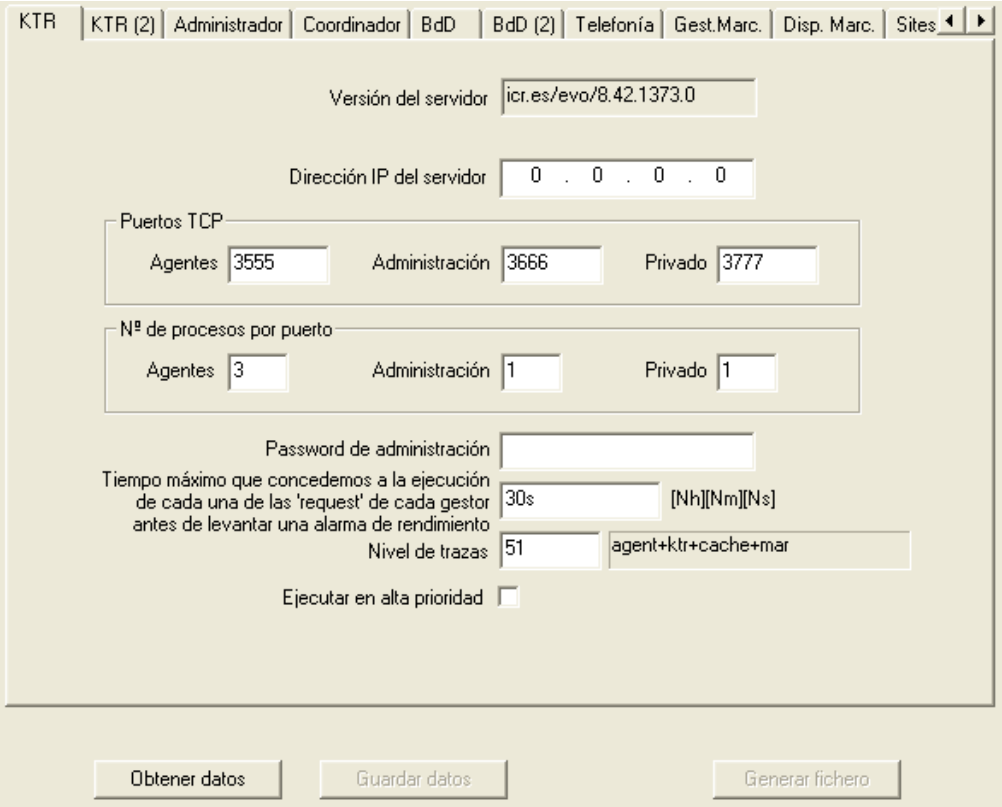
Once the connection is made, a main window with several tabs appears with configuration data.

9.1 THE CONFIGURATION WINDOW

From this window, we can configure Omni+ dynamically. To obtain server data, we press the button "Obtain data"; to update them press the button "Save data."

We can also request from Omni+/Admin to generate a registry parameters file (extension ".reg") to obtain a copy of all the parameters used by ServerAdmin. For that we press the button "Generate file."

We can only save the configuration or generate the parameters file if, when connecting, we entered a valid password. Otherwise, all the corresponding buttons will appear disabled.



The configuration window is divided into several different parameter groups which we will discuss next.

9.1.1 "RTK" GROUP

Changes in this group take effect only when restarting Omni+.

Its parameters are:

Server IP address: IP address of the machine where Omni+ resides.

> If the IP address is invalid, the service will not start.

TCP port for agents: Port enabled for connection of agents. This is the port we must use when connecting to the server using iAgent.

No. of processes for the agent port: Defines the number of threads in charge of receiving agent requests. Minimum value = 1.

TCP port for administration: Port enabled for administrative connections. This is the port we must use when connecting to the server using Omni+/Admin.

No. of processes for the administration port: Defines the number of threads in charge of receiving administration requests. Minimum value = 1.

Private TCP port: Port enabled for connections from other sites and other services. Omni+ utilizes this port internally to connect to other servers in a multi-site configuration.

No. of processes for the private port: Defines the number of threads in charge of receiving requests from other sites. Minimum value = 1.

> IMPORTANT: Parameters that modify the number of processes are very critical and may degrade service performance considerably. It is advisable not to modify noticeably this type of parameters.

Administration password: This is the value to check when entering a password in the connection dialogue of Omni+/Admin.

Maximum time we allow for the execution of each of the requests of each of the managers before raising a performance alarm: This type of alarms can only be seen with trace collection tools (TraceMon).

Trace Levels: This value identifies the trace levels that Omni+ emits. It may have the following values or any combinations of them:

0 – No traces. Only traces of DLLs utilized by the server appear.

1 – Agent traces.

2 – RTK (Real Time Kernel) traces, the server core.

4 – Detail of the server processes (threads).

8 – Information about channels manager devices.

16 – Traces of contacts cache.

32 – Traces of dial manager.

64 – Other traces from minor components of the server.

128- Call recording manager.

256- Traces of XML messages.

> To combine several options simultaneously, we simply must add the value of each option. For example, for traces of agent, RTK, cache and autodial, we put the value 51, which is the addition of the values of the corresponding options: 1+2+16+32 = 51.

9.1.2 "RTK(2)" GROUP

This dialogue allows entering license codes to activate the Enterprise edition. Enterprise mode, additionally, allows enabling/disabling sending statistical information for improving Omni+.

See procedure to follow in the Installation Manual.

9.1.3 "ADMINISTRATOR" GROUP

Changes in this group have an immediate effect. Its parameters are:

No. of administrator processes: No. of threads in charge of satisfying administration requests. Recommended values: Between 1 and 3, depending on the number of administration connections foreseen.

Administrator's 'watchdog' timer: No. of time lapse milliseconds between monitoring information refreshes sent to Omni+.

> It is advisable not to put values lower than 10000 ms; otherwise, Omni+'s performance may be seriously affected.

9.1.4 "COORDINATOR" GROUP

Changes in this group have an immediate effect. Its parameters are:

No. of coordinator processes: No. of threads in charge of satisfying the coordinator's requests. Recommended values: Between 1 and 20, depending on the foreseeable number of agents to connect to Omni+.

Time between retries to locate outgoing contacts: No. of seconds to elapse before Omni+ retries the location of an outgoing contact. This parameter only affects when the agent has outgoing campaigns configured and, in the moment in which it requests a contact, none exist. Recommended value: 60 seconds.

Security timeout to eliminate obsolete contacts: No. of seconds that a contact may remain in memory before Omni+ decides to eliminate it. With this parameter, contact accumulation in memory, due to telephony errors, is avoided. Recommended value: 3600 seconds.

> WARNING: This value must never be less than the maximum time estimated for a contact. Otherwise, a destruction of valid contacts could be provoked.

Coordinator's 'watchdog' timer: No. of milliseconds of time lapse between two launches of the coordinator tasks verification process.

> It is advisable to put values between 10000 ms and 60000 ms; otherwise, Omni+'s performance may be seriously affected.

Pass to READY after "login": Check to obtain that immediately after getting an agent, it passes automatically to available.

> This functionality is not available when the agent uses the softphone integrated into iAgent.

Pass to READY after ending a call with no campaign: Check to obtain that an agent passes to available automatically when ending a call that is not of campaign.

Status to pass to when a private call is completed: A private call is every call that is not part of a campaign. Calls in campaign are made pressing the button "Call in campaign" of iAgent (see, also, the parameter "Manual outgoing calls made within a transaction are considered of campaign."). This parameter allows us to define which state it passes when the call ends. Smart mode indicates passing to the mode in which the agent's telephone terminal was before making the call.

Header to identify data passed as 'user data': Identifies the string utilized as header of the data passed through 'user data', for the PBXs that support this feature. Normally this field remains empty.

Identification of idTransfer/VirtualDev/idTransac/idRepo: Identifies the strings utilized in "User Data" to identify different elements of internal usage.

Time between sending KeepAlive to check the connections: From time to time as specified by this parameter, the server checks all its connections to verify they are valid. For this, it sends a KeepAlive event. If there is no response from the client, the connection is considered dead and an automatic logout process is launch to the agent involved. The recommended value is between 5 and 15 minutes.

Manual outgoing calls made within a transaction are considered of campaign: If this parameter is checked, when an agent is within a transaction (for example in preview) and makes a call, whether a call to a client's number or not, the call is considered of campaign, as long as it is not directed to an agent of the Center. On the contrary, if this parameter is unchecked and considering the same scenario, the call will be considered of campaign only if it was made through the function MakeCallInCampaign (campaign call button of iAgent). By default, this value appears checked.

9.1.5 "DB" GROUP

Changes in this group have immediate effect and provoke the reconnection to DB of all the threads of the DB manager. Its parameters are:

No. of processes of the Database manager: No. of threads in charge of satisfying access to DB requests. Recommended values: Between 1 and 20, depending on the foreseeable number of agents logging in to Omni+.

Data Source Name: Name of data origin. A system data origin must be defined utilizing the "ODBC Administrator" whose name we will enter in this field.

Database User: DB user with administration rights to access the tables of the data model of Omni+.

Database User Password: Password of the user previously specified.

Database Owner: *DbOwner or Omni+ tables owner.*

Database Prefix:

Timer to maintain the list of contacts saved: No. of milliseconds for which a contact in maintained in the list of contacts saved. The objective of this list is to minimize access to contact tables to check if one of them has already been saved. Recommended value: 600000 ms.

Timer for refresh of agent cache: The DB manager maintains a cache of agents defined in the DB with the purpose of minimizing access to the agents table. This timer represents the number of milliseconds elapsed during which a refresh of said cache takes place. Recommended value: 3600000 ms.

Timer for refresh of device cache: The DB manager maintains a cache of devices defined in the DB with the purpose of minimizing access to the devices table. This timer represents the number of milliseconds elapsed during which a refresh of said cache takes place. Recommended value: 5400000 ms.

Database manager's 'watchdog' timer: No. of milliseconds of time lapse between two launches of the manager tasks verification process. Recommended value: 30000 ms.

> It is advisable not to use values lower than 10000 ms; otherwise, Omni+'s performance may be seriously affected.

Maximum number of errors before resetting connection: If the number of errors specified in this field is surpassed, Omni+ disconnects from the DB and tries to reconnect. Recommended value: 5.

9.1.6 "DB (2)" GROUP

Changes in this group have an immediate effect. Its parameters are:

Name (no parameters): Name of DB cleaning 'stored' not specifying any parenthesis. Normally: sp_Maintenance.

Execution time (HH:MM): Execution time of DB cleaning 'stored'.

Periodicity (in No. of days): Periodicity in which DB cleaning 'stored' must be executed.

9.1.7 "TELEPHONY" GROUP

Changes in this group have an effect as new connections to the TS (Telephony server) are made. Devices that already have an open connection with the TS, maintain it until it is closed. Its parameters are:

No. of processes of the telephony manager: No. of threads in charge of satisfying access to Telephony requests. Recommended values: Between 1 and 30, depending on the foreseeable number of agents logging in to Omni+.

Telephony server link identifier: String corresponding to the link name (or *link* registered in the TS. For CT-Connect servers is a simple name; for TSAPI servers, is: "AVAYA#CSTASERV#CSTA."

Telephony server (TServer): Name of the machine where TS is installed.

Telephony server user: User with which Omni+ connects to TS

User password: Password with which Omni+ connects to TS

Type of connection with the PBX: List of values that identify the different types of PBXs and telephone providers that support Omni+.

Alternative servers: Optional list of machine names where other telephony servers are found, to which resort to in case of an eventual drop of the main server.

Telephony manager's 'watchdog' timer: No. of milliseconds of time lapse between two launches of the manager tasks verification process. Recommended value: 40000 ms.

> It is advisable not to put values lower than 10000 ms; otherwise, Omni+'s performance may be seriously affected.

9.1.8 "DIAL-UP MGMT." GROUP"

Changes in this group have immediate effect and provoke a reconnection to the dialer. Its parameters are:

Dial-up devices servers: in this dialogue, we can configure the IP address, listening port and dial-up devices controlled by the dial-up server. The dial-up devices must have been registered in the dial-up devices tab and in the PBX used by the corresponding Dial-up Server.

Manager's 'watchdog' timer: time lapse between two launches of the manager tasks verification process. Recommended value: 10 s.

It is advisable not to put values lower than 10000 ms; otherwise, Omni+'s performance may be seriously affected.

"Alpha" constant for the calculation of exponential means: Omni+'s predictive dial-up needs to calculate time means to be able to calculate the ideal moment to make predictive calls. To avoid the distortion that it would cause incorporating to the calculation of a mean an atypical sample (a procedure that had taken too little or too much time), an exponential mean is utilized calculated as follows:

Mean = Alpha * New_sample + (1 – Alpha) * Last_mean

Alpha's default value is 0.025. The idea is that the effect a sample has in the calculation of the mean is important when incorporated but that, little by little, its importance decreases. Increasing the value of this constant, we increase the "reactivity" of the mean and decreasing the value, we increase the "inertia" of the mean. In the following table, the weight that a sample has on consecutive iterations for different Alpha values is shown.

		Alpha		
		0,01	0,025	0,1
Iteration	0	100%	100%	100%
	1	99%	98%	90%
	2	98%	95%	81%
	3	97%	93%	73%
	4	96%	90%	66%
	5	95%	88%	59%
	6	94%	86%	53%
	7	93%	84%	48%
	8	92%	82%	43%
	9	91%	80%	39%
	10	90%	78%	35%
	11	90%	76%	31%
	12	89%	74%	28%
	13	88%	72%	25%
	14	87%	70%	23%
	15	86%	68%	21%

Minimum number of samples and agents per campaign: It is the minimum number of samples and agents per campaign from which the predictive dialer starts making predictions. If one of these two thresholds have not been surpassed, the dialing is made progressively.

Maximum inactivity time to reset the values of a mean: if the time specified for this parameter elapses with no activity, the mean is considered non-valid and must be recalculated starting from zero.

Request, dialing, alert and queue timeouts: maximum times of internal use. It is suggested not to modify them.

Maximum time between transfer and confirmation / of device lock: maximum times of internal use. It is suggested not to modify them.

Minimum/Maximum duration of a management task to enter statistics: very short or very long duration managements distort statistics and negatively affect the predictive dial-up performance. Therefore, processes whose durations are below or above these values will not be taken into account for the statistical calculation. Also, if a process extends beyond the established time in "Maximum duration of a process to enter statistics" the prediction mechanism is also inhibited, and the module stops making calls for this agent. Endingly, when the management finishes and the agent becomes available, the next call will be in the progressive mode. This mechanism prevents the system to continue trying new calls indefinitely because of unusually long duration managements.

Waiting time of a dialing that has not found free dialers: it is the time in which the system will retry dialing when this has not been possible because there were no available dialers. It is recommended to leave this parameter in its default value.

9.1.9 "DIALING DEV." GROUP"

This tab allows us to define dial-up devices that can be assigned to dialing servers and must exist as PBX devices controlled by the corresponding Dialing Server.

Note: THAL is used only for those PBXs that cannot dial through software and require hardware devices.

9.1.10 "SITES" GROUP

Changes in this group take immediate effect and provoke the connection/disconnection of the specified sites. Its parameters are:

Other centers: List of Omni+ remote centers.

Identifiers: List of extension identifiers that control each of the remote centers (or sites) specified. The field ANI| is used to specify the number at which the remote center extensions begin; Prefix indicates that the ANI specified is a prefix to be added to the extension number to be dialed to access one of the agents in the remote center; and Pattern indicates that the ANI is a pattern followed by all extensions in the remote center (for example, all start with a 3).

9.1.11 "LIST MGMT." GROUP.

Changes in this group have an immediate effect. Its parameters are:

No. of processes of GAL: No. of threads in charge of satisfying access needs to the coordinator's list manager. Recommended values: Between 1 and 10, depending on the number of agents foreseen.

GAL's 'watchdog' timer: No. of time lapse milliseconds between monitoring information refreshes sent to Omni+.

> It is advisable not to put values lower than 10000 ms; otherwise, Omni+'s performance may be seriously affected.

Max lifetime of a campaign in memory: No. of seconds a campaign may remain cached in memory. Once said number of seconds elapses, the campaign is refreshed. Recommended value: 60 seconds.

Refresh upper limit of group cache: No. of seconds that must elapse as a minimum for the contacts of a campaign to be refreshed in the cache with no intervention of any other reason to prompt the refresh. This value causes that, even when there may be no movement of contacts for a campaign, these are refreshed every now and then. Recommended values: Between 300 and 3600 seconds.

> This parameter must never be less than the cache refresh lower limit of the group.

Refresh lower limit of group cache: No. of seconds that must elapse for a campaign to be refreshed again. This prevents a campaign from being constantly refreshed. It is, so to speak, a safe time in which it is guaranteed that the campaign will not be refreshed. Recommended values: Between 10 and 300 seconds.

> This parameter must never be higher than the cache refresh upper limit of the group.

Refresh threshold of agent cache: No. of seconds that must elapse for the contacts assigned to a specific agent to be refreshed. Recommended values: Between 300 and 600 seconds.

VPA to serve contacts of agents in progressive campaigns: If checked, indicates that the contacts assigned to an agent who returns the contacts cache while in progressive mode will be managed in automatic preview. If unchecked, these contacts are served in normal preview.

Control attributes of the broom-process to eliminate out-of-range contacts: If a callback falls out of the range in which a client must be called (for example, because the call has been programmed for a day/hour in the past), Omni+ has an automatic process that finalizes these contacts with the call disposition of system 17 ("Outside call interval") which makes them move to the list "Non callback." This process is called "broom-process" because prevents contacts from being left in a state such that the system will never program the call. It is executed periodically, based on the following parameters:

- Tendency of the number of contacts to request: minimum number of contacts with no logged in agents, minimum with logged in agents and maximum that the system revises to be callback.
- Timer tendency: established the frequency with which the broom process is executed.
    - Min: when there are no logged in agents.
    - Max: when there are logged in agents and the waiting time mean is greater than the HighWM value.
    - Min with Agents: when there are logged in agents and the waiting time mean is lower than the LowWM value.
    - Normal: when there are logged in agents and the waiting time mean is between the LowWM and the HighWM values.
- Mean waiting time to execute a query: sets the LowWM and HighWM limits (see previous parameter).

- Maximum callback time of a contact before aborting loop: if the finalization of a contact takes longer than the specified time, the finalization process of out-of-range contacts, selected to be finalized by the broom process, is aborted.

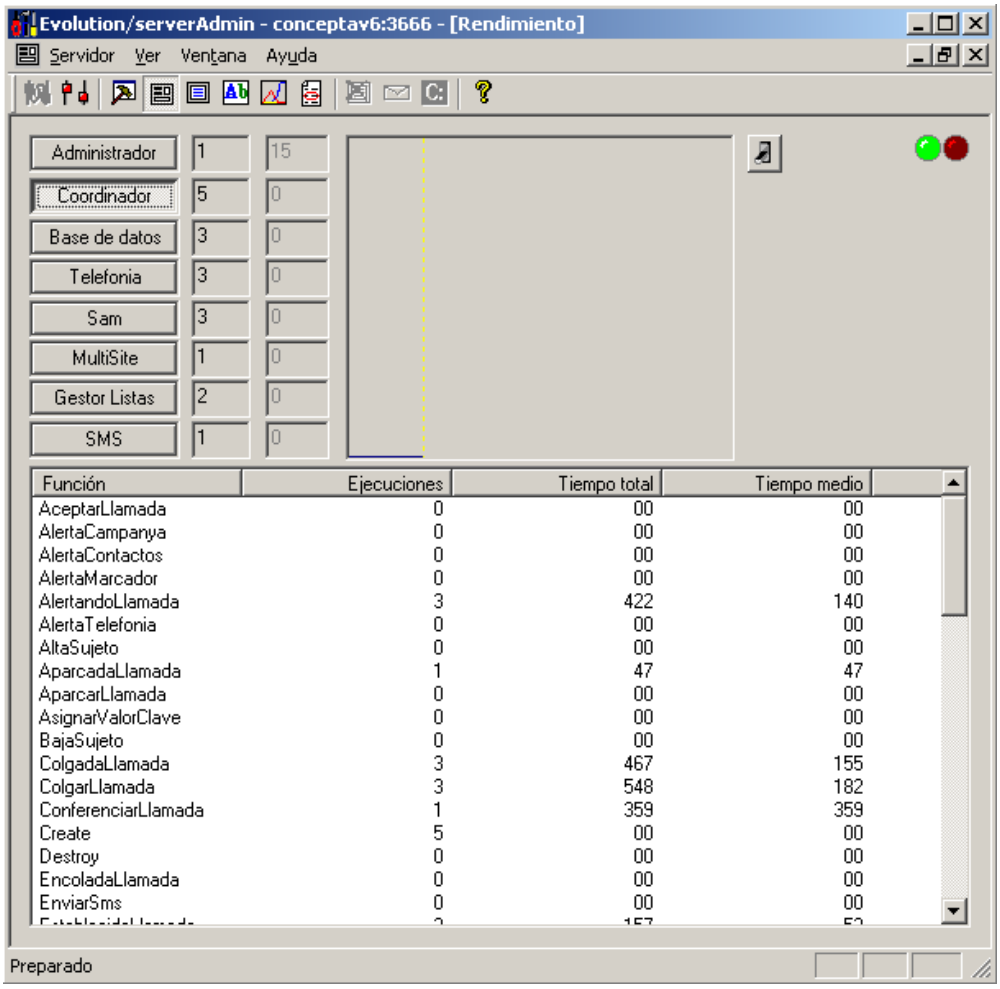
9.2 PERFORMANCE WINDOW

Its purpose is to monitor the number of executions and the mean and total times of execution of each of the different functions of Omni+. These data can be seen for each of the managers into which Omni+ is divided.

From this window, we can also see the number of threads assigned to each group or manager, as well as the maximum waiting time in the queue, in milliseconds, of a message in each one of the managers.

We can also observe a graphical window where the detail of the processes load is shown for the selected module.

In the upper right part of the window we find a button by way of switch that allows us to enable or disable reception of data from Omni+ for this window. Initially it is disabled (we notice it because the lever is up and the red led is on), but pressing it enables it (lever is down, and the green led is on).

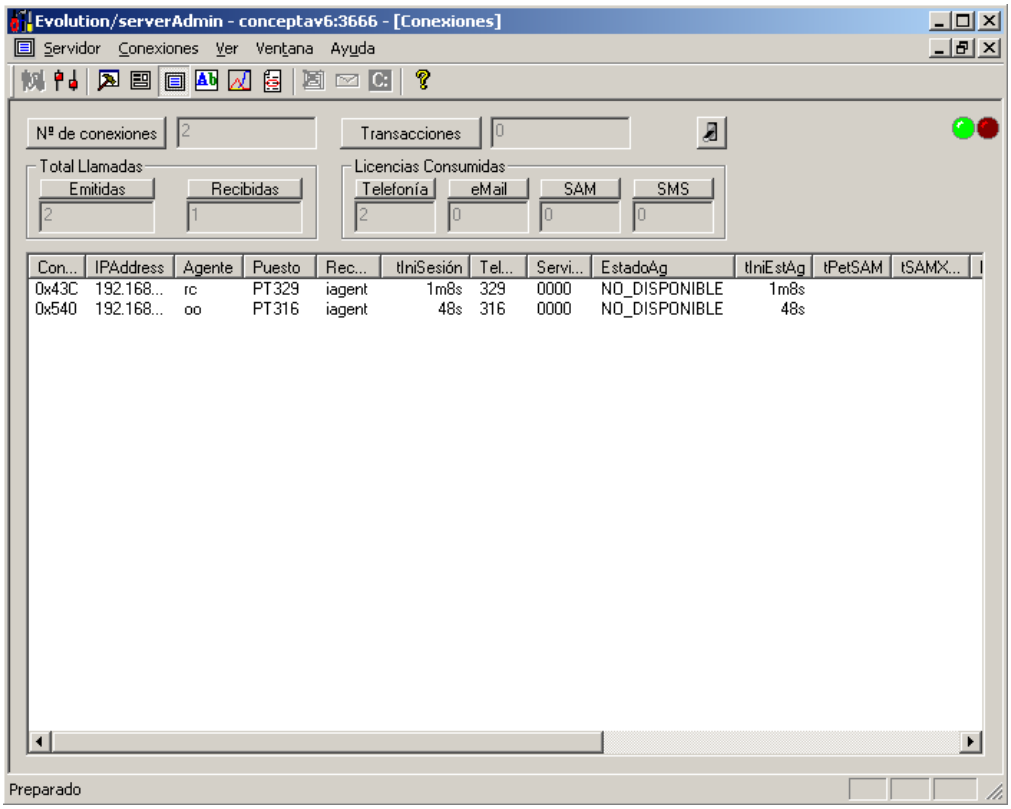


It is recommended not to leave the reception switches of events monitorization indiscriminately and indefinitely enabled, since they could cause performance problems in Omni+.

9.3 CONNECTIONS WINDOW

Its objective is to monitor agents that are connected to Omni+. For each agent, the data shown are: Connection ID, IP address of workstation, login, workstation, resource, time elapsed since session started, telephones, assigned services, agent status, time elapsed since entering the latest state, time elapsed since the last request to SAM, SAM transfer time, interlocutor device, number of transaction performed, number of emitted calls, number of received calls, identifier of transaction in progress, identifier of campaign in progress, identifier of subject in progress and time elapsed since the start of the transaction.

In the upper part of the call we can observe both the total number of connections and the total of transaction performed. Also, it displays the total of emitted and received calls, as well as the number of licenses consumed of each type.



From this window, a connection can be selected and its disconnection from Omni+ can be forced (button).

It is recommended to perform this forced disconnection only exceptionally and only on those connections that we considered to be, for any reason, in a failed state.

We can also send an administrative message to one or all connections (button), or execute a remote command (system prompt) that will execute in the equipment where the server is located (button).

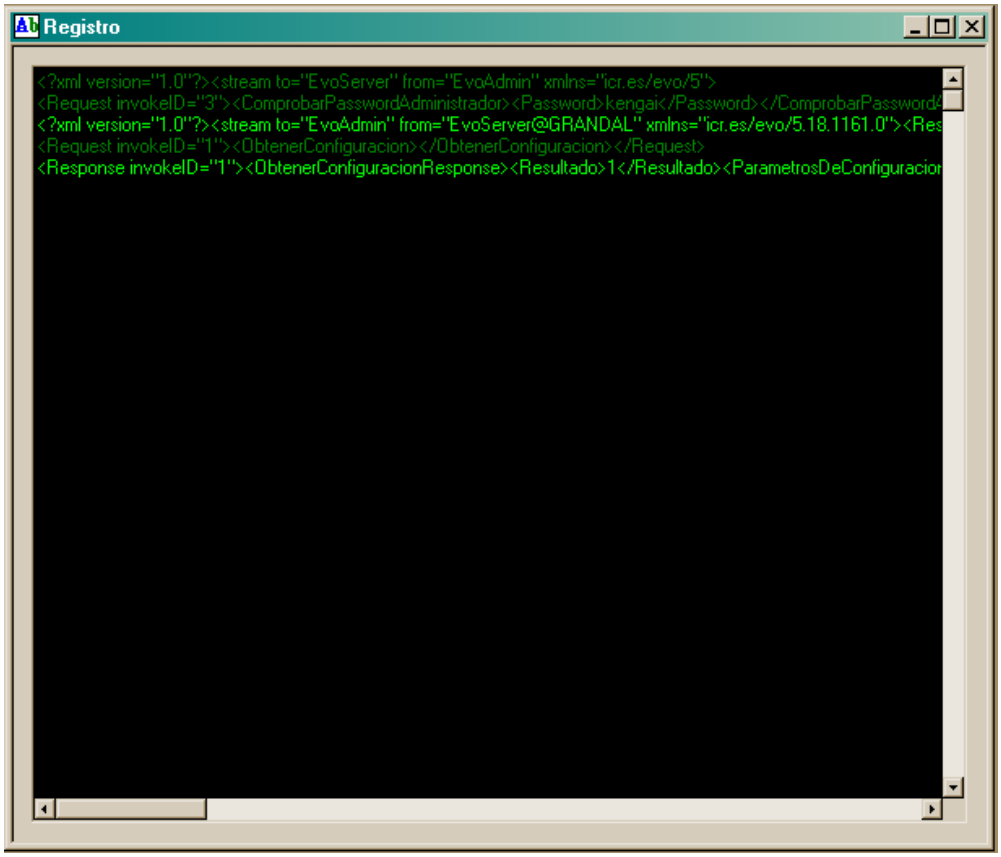
> These operations can be done only if we have provided a valid administrator password when starting the connection.

In the upper right part of the window we find a button similar to a switch that allows us to enable or disable reception of data from Omni+ for this window. Initially it is disabled (we notice it because the lever is up and the red led is on), but pressing it enables it (lever is down, and the green led is on).

> It is recommended not to leave enabled the reception switches of events monitorization indiscriminately and indefinitely, since those could cause performance problems in Omni+.

9.4 THE RECORD WINDOW

This window displays messages exchanged between Omni+ and Omni+'s administrator. The protocol utilized between both is XML. It does not have other use than studying the message flow between client and server.



9.5 THE GAL WINDOW

Its purpose is to monitor Omni+'s list manager. Initially, displays the list of campaigns managed by the module. If we select one of them, the screen will display data of said campaign, which are:

Campaign ID.

Campaign parameters:

Status: ACTIVE or PAUSED.

Mode: NULL (entering), PV or PV_AUTO (preview), PROGRESSIVE (automatic dialer).

Lists: The percentage of calls in the list of system callbackof the total of records that will be distributed between this list and the non-callback list. (For example: 50 corresponds to 50%, which in campaign supervision equals a SP/NP 1:1 ratio)

High and *Low Watermark*: Upper and lower limit of contacts per agent in the system cache.

System cache:

Available: Available contacts (of the total loaded) in the system cache.

Latest refresh time: Time elapsed since the last refresh of the system cache.

Reason for refresh: What caused the latest refresh.

Agent cache:

Available: Available contacts (of the total loaded) in the agent cache.

In progress: Contacts delivered to an agent and not closed yet.

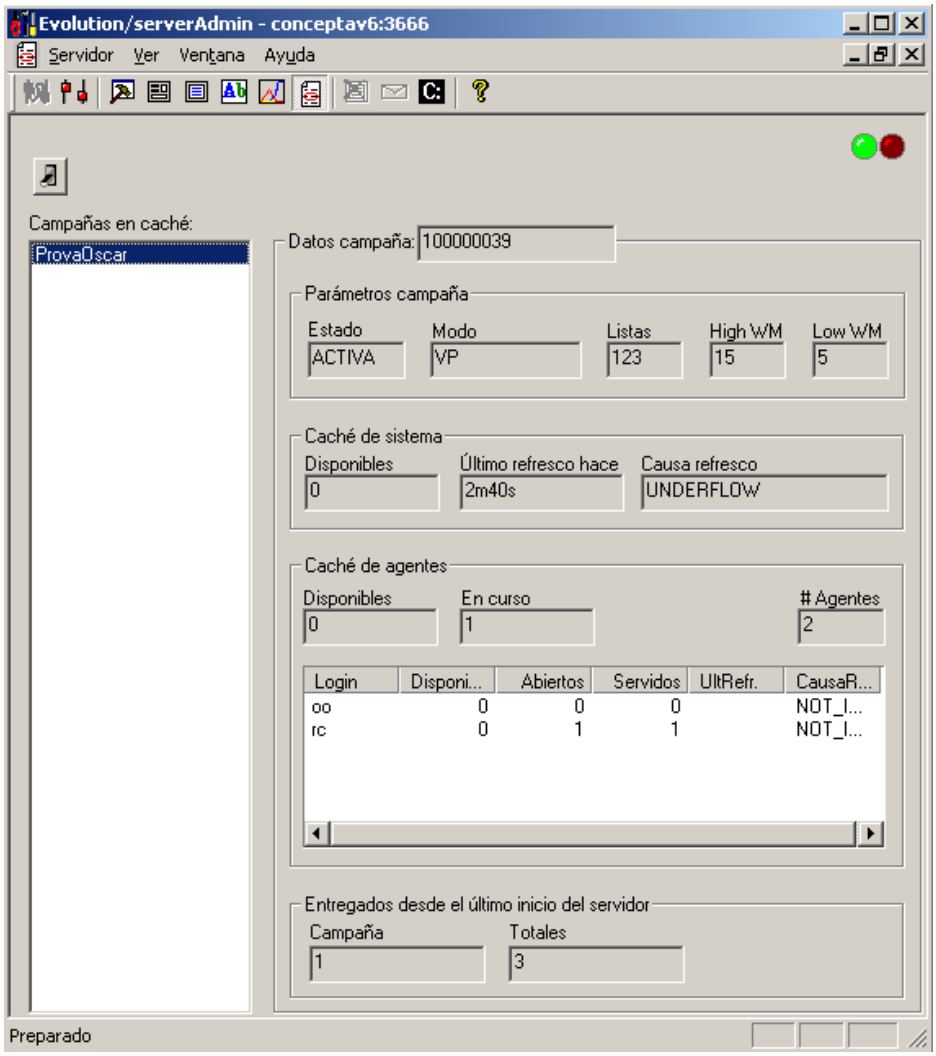
#Agents: No. of agents participating in the selected campaign and who are logged in.

List of agents with contacts in cache and available of each one.

Contacts delivered since the last server start-up:

Campaign: No. of contacts delivered by the list manager to the selected campaign since the last time the server was started.

Totals: Total number of contacts delivered by the lists manager since the last time the server was started, independently from the campaign selected.


Evolution/serverAdmin - conceptav6:3666
Servidor Ver Ventana Ayuda
Campañas en caché:
ProvaOscar
Datos campaña: 100000039
Parámetros campaña
Estado ACTIVA
Modo VP
Listas 123
High WM 15
Low WM 5
Caché de sistema
Disponibles 0
Último refresco hace 2m40s
Causa refresco UNDERFLOW
Caché de agentes
Disponibles 0
En curso 1
Agentes 2
Login Disponi... Abiertos Servidos UltRefr. CausaR...
oo 0 0 0 NOT_I...
rc 0 1 1 NOT_I...
Entregados desde el último inicio del servidor
Campaña 1
Totales 3
Preparado

10 TRACEMON

Tracemon is an auxiliary tool that allows to obtain traces generated by an application in real time. Utilizing the trace library all sorts of information related to the application can be generated while it is running.

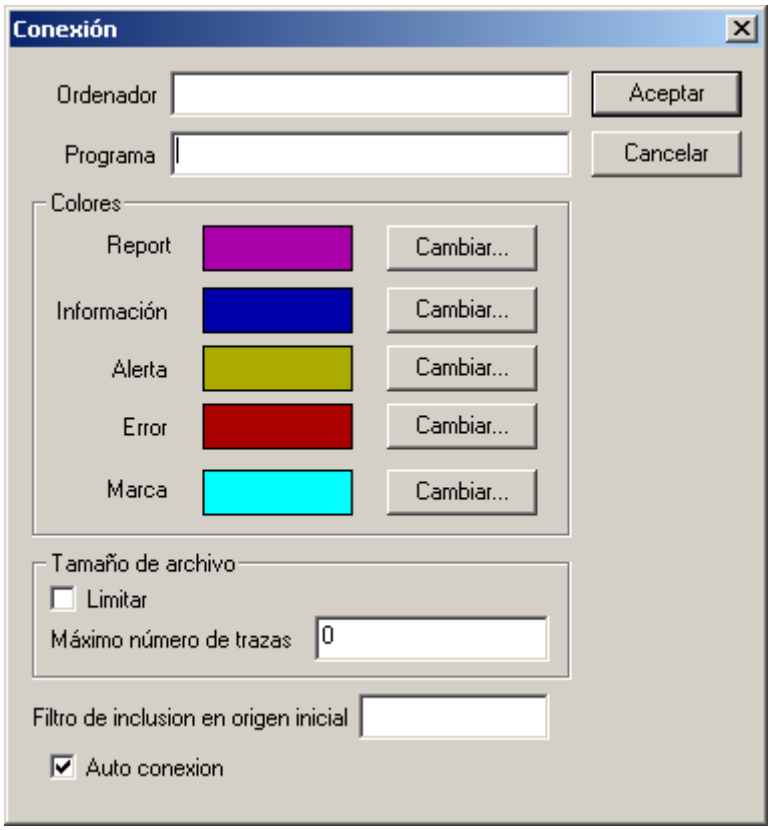
These traces are collected by the trace engine, which will be charged with transmitting them, in real time, to all instances of TraceMon connected in that instant. Traces can also be collected into a data file for later review.

10.1 APPLICATION CONNECTION

When TraceMon starts, a new blank document is displayed. This document will store the traces generated by the application we are going to debug. First thing to do is to establish a connection with said application.

Before initiating the connection, its configuration must be defined. This can be done with the menu option: *Connection - Configure...* or pressing the button  .

10.1.1 CONNECTION PARAMETERS



- Computer: The name of the computer where the application to be traced is running must be indicated. Since the communication objects between the trace engine and TraceMon are pipes, an IP address cannot be indicated, it must be a NETBIOS name.
- Program: Name of the application to be traced. This name must be defined previously from the application.

- Colors: Allows to define the colors to be displayed for each of the different types of traces.
- File size: Allows to limit the size of the file or document to be generated. This also limits memory use while receiving traces.
    - Limit: Activate this box to limit file size or deactivate it for an unlimited size.
    - Maximum number of traces: Here it must be indicated the maximum number of traces that will be stored in this file. When the maximum number of traces is reached, TraceMon discards the oldest trace for each new trace received.
- Initial origin inclusion filter: Allows to define an origin filter to be established just when the connection is established.
- Autoconnection: Activating this box, TraceMon will try reconnecting automatically with the application, should a disconnection occurred.

10.1.2 CONNECTION

To connect TraceMon with the application to be traced, the menu option *Connection - Connect...* can be used or the  button can be used. TraceMon will disconnect from the application by pressing the same button. It can also be disconnected with the menu option *Connection - Disconnect*.

When TraceMon connects to the application, from that moment it will start receiving the traces generated by the application.

10.2 OPERATION MODES

10.2.1 DISPLAY MODE

When a new document or a new connection is created, it is in display mode. In display mode, new traces received from the application are added to the end of the document. In this manner, the last traces received will always be on the screen. In display mode, the user cannot interoperate with TraceMon. To pass to editing mode, this can be done pressing the ENTER key or pressing the left button of the mouse inside the document window

To go back to display mode from the editing mode, press the ESC or the BACK-SPACE keys.

10.2.2 EDITING MODE

To operate with TraceMon it is necessary to pass to editing mode, by pressing the ENTER key or clicking with the mouse inside the document window. This operation will select a trace.

One can move to the previous or later trace with the cursor keys or paginate the document with the pagination keys. When a trace occupies more space than available on the screen, the width of the document is enlarged with the CTRL+ → key and then the displacement bars can be utilized to see the hidden part of the trace.

Traces can be selected with the mouse, utilizing the CTRL and SHIFT modifiers for multiple selections.

Traces can be cut, copied and pasted among TraceMon documents. Traces can also be cut and pasted from a TraceMon document to a text document.

Searches by origin (CTRL+F) or by trace text (CTRL+B) can be done. And later go to the next or previous with F4 or SHIFT F4 respectively for searches by origin and with F3 or SHIFT F3 respectively for searches by text.

Selected traces can be exported to a text file with the option *Edit - Export as LOG...* and subsequently imported with the option *Edit - Import from LOG...*

Search marks can be created with the CTRL+F2 key and later move from one mark to another with F2 to go to the next and SHIFT+F2 to go to the prior.

10.3 TRACE INFORMATION

For each trace, date and time is indicated, location of server where the application generating the trace is running.

Each trace also has an origin. This origin was defined previously in the application and is used to know which part or module of the application generated the trace.

The text of the trace will be the information defined to be shown in each trace from the application.

Five different types of traces exist; the type to which each trace belongs is defined in the emission of said trace from the application:

- Normal: By default, all traces are of this type.
- Report (violet): Traces of this type are defined to show collected information.
- Information (blue): Traces of this type are defined to show informational messages. These traces are also registered in the system event register of the computer where the application is running.
- Alert (yellow): Traces of this type are defined to show warning messages. These traces are also registered in the event register.
- Error (red): Traces of this type are defined to show application error messages. These traces are also registered in the event register.

10.4 FILTERS

Filters allow to select the traces we want to receive from the application and hide or show traces already received.

When traces are filtered in origin, the trace engine will not send to TraceMon the traces concurring with the established filter. When the filter is eliminated, filters of that type will be again received, but traces of that type produced while the filter was active will not be received.

When traces are filtered in local, TraceMon will hide the traces concurring with the established filter. When the local filter is eliminated, traces that were hidden will be seen again.

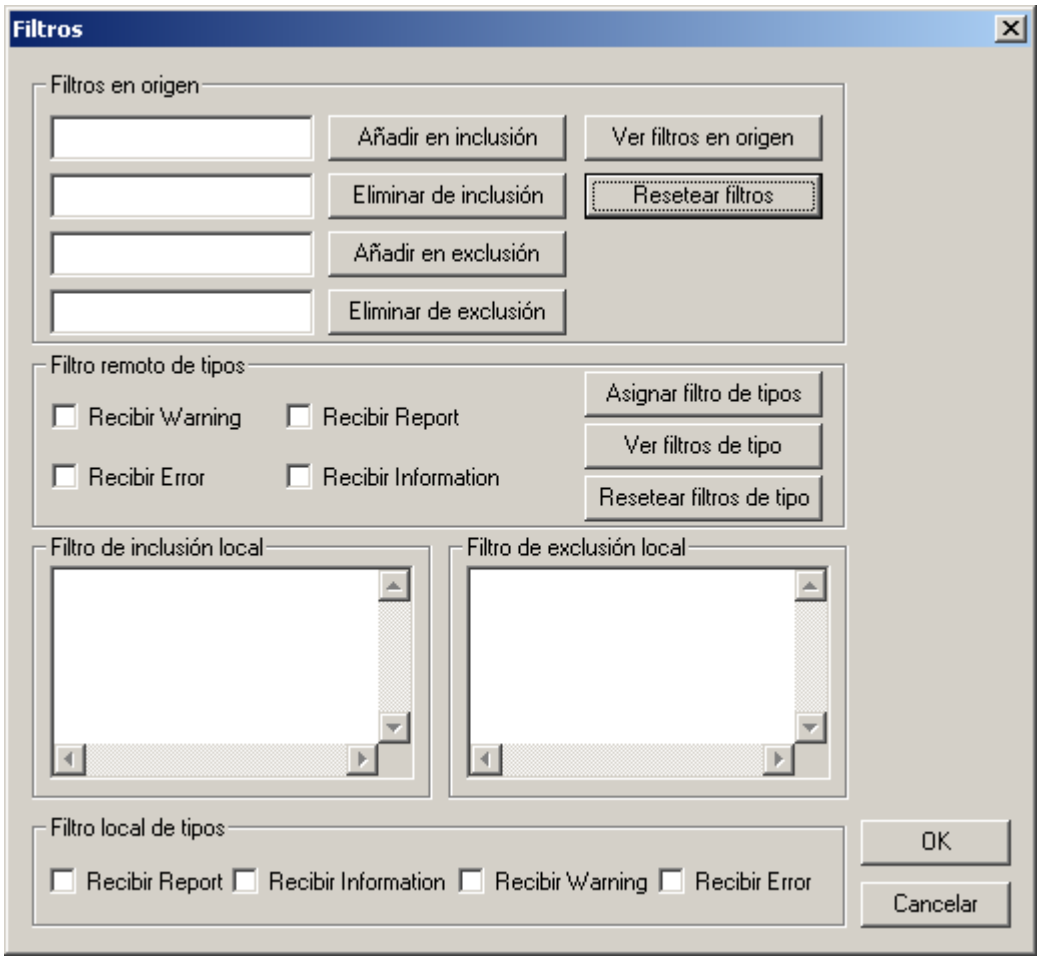


Figure 2 - Filter parametrization window

10.4.1 FILTERS IN ORIGIN

- Add in inclusion: Adds the text indicated in the inclusion filter. This will cause receiving all traces whose origins begin with this text.
- Eliminate from inclusion: Eliminates the indicated text from the inclusion filter.
- Add in exclusion: Adds the text indicated in the exclusion filter. This will cause not receiving traces whose origins begin with this text.
- Eliminate from exclusion: Eliminates the indicated text from the exclusion filter. From this moment on, traces whose origins begin with this text will be received again.
- See filters in origin Shows the filters established in the trace engine.
- Reset filters: Eliminates all the filters established in the trace engine. From this moment on all traces will be received again.

10.4.2 REMOTE TYPES FILTER

Allows to establish or eliminate the trace type filter we wish to receive. The boxes of the trace type we wish to receive must be activated or deactivated and subsequently select *Assign type filter*. The option *See type filters* displays the established filter. With the option *Reset type filters* the established filter is eliminated.

10.4.3 FILTERS IN LOCAL

- Local inclusion filter: Adds the text or texts indicated in the local inclusion filter. This will cause showing all traces whose origins begin with this text. Multiple texts can be added, one in each line.
- Local exclusion filter: Adds the text or texts indicated in the local exclusion filter. This will cause not showing all traces whose origins begin with this text. Multiple texts can be added, one in each line.
- Local types filter: Activate each of the boxes of the types of traces to be shown:

10.5 PERSISTENCE OF TRACES

Trace management can be configured to file by a series of register keys:

To configure traces, regedit must run and edit the following registry keys under \\HKEY_LOCAL_MACHINE\SOFTWARE\Omni+\NFL32

Each module or application of Omni+ has its own sub-folder under NFL32, for example:

Evoserver:	\\HKEY_LOCAL_MACHINE\SOFTWARE\Omni+\NFL32\EvoServer
iAgent:	\\HKEY_LOCAL_MACHINE\SOFTWARE\Omni+\NFL32\iAgent
EvoDialerServer:	\\HKEY_LOCAL_MACHINE\SOFTWARE\Omni+\NFL32\EvoDialerServer

Each of these folders accepts the following keys:

DWORD: FileBytes (bytes per file, default=10000000)
DWORD: MaxFiles (number of files, default=50)
DWORD: WriteToFile (write to file yes/no, default=1 (yes))
DWORD: BufferSize (RAM buffer in characters, default=60000 characters)
STRING: FilePath (Path to locate trace files)

For example, if we edit the following values in \\HKEY_LOCAL_MACHINE\SOFTWARE\Omni+\NFL32\EvoServer:

DWORD: FileBytes = 10485760 (0xA00000).
DWORD: MaxFiles = 50
DWORD: WriteToFile = 1
DWORD: BufferSize = 0

By default, traces are generated in the folder Omni+\Logs under the directory "program data" which in W2003 is resolved as C:\Documents and Settings\All Users\Program data (in other OS as C:\ProgramData) with a maximum of 50 10-megabytes files (500 megabytes in total) that will be recycled as it becomes necessary. Folders will have a name of the type EvoServerXX?.log, where XX goes from 01 to 50.

11 UPDATE PASSWORDS IN OMNI+

11.1 UPDATE DATABASE ACCESS PASSWORDS

If one wishes to change the default password of users created by Omni+ in the Database, in addition to change it in the SQL Server and in the ODBC data origins: OMNI+DB and OMNI+DB_HISTO, it will be necessary to update several files and entries in the system registry.

11.1.1 NCADMIN

Inside the **wwwroot** folder in IIS (*by default C:\inetpub\wwwroot*):

CrmConnector\CrmWorkflow*CrmWorkFlow.xml*	<Omni+Password>***New Key***</…>
Manager*Web.config*	... connectionString="…;pwd=***New Key*** "…
	…HistoryConnString="…;pwd=***New Key*** "…
	…"gConnStrImport", "…;PWD=***New Key*** "…
Omni+\ScriptServer*Web.config*	... connectionString="…;pwd=***New Key*** "…
Omni+\DeveloperService*Web.config*	... connectionString="…;pwd=***New Key*** "…

In the system registry under **HKEY_LOCAL_MACHINE\SOFTWARE\Omni+**:

DaemonAlarm\Global*ConnectionString*	…;PWD=***New Key***
DaemonRecorder\BdD*Password*	***New Key***
EvoServer\BD*DbPassword*	***New Key***
EvoTaskDaemon*DbConnectionString*	…;PWD=***New Key***
MaintenanceDaemon*DbConnectionString*	…;PWD=***New Key***
MaintenanceDaemon*DbHistoConnectionString*	…;PWD=***New Key***
IncentiveModule\Global*ConnectionString*	…;PWD=***New Key***
IncentiveModule\Global*ConnectionStringHisto*	…;PWD=***New Key***

11.1.2 NCAGENTE

Inside the **wwwroot** folder in IIS (*by default C:\inetpub\wwwroot*):

Omni+\ScriptServer*Web.config*	…key="SYS_PWD" value="***New Key*** "…
	... connectionString="…;pwd=***New Key*** "…
Omni+\ScriptServer\Scripts**Web.config*	…key="SYS_PWD" value="***New Key*** "…
*Each script cotnains a **Web.config** archive, must change all.*	... connectionString="…;pwd=***New Key*** "…
webroot\etc\CrmConnector*web.config*	…key="SYS_PWD" value="***New Key*** "…
webroot*global.asa*	…("SYS_PWD") = "***New Key***"

12 DATABASE STRUCTURES

12.1.1 STRUCTURE OF THE CLIENT TABLE

CLIENTS				
NAME	**TYPE**	**SIZE**	**NULL**	
IDTYP	Numeric	2	NO	
SUBJECTID	**Numeric**	**9**	**NO**	
ORIGINALID	Varchar	36	NO	It is a unique external key Must be unique per campaign, for example the National ID or client code.
NAME	varchar	20	NO	
LASTNAME1	varchar	40	NO	
LASTNAME2	varchar	40		
ADDRESS	varchar	40		
POPULATION	varchar	40		
ZIP CODE	varchar	5		
PROVINCE	varchar	30		
COUNTRY	varchar	30		
TELEPHONE	varchar	16		
TELEPHONE2	varchar	16		
FAX	varchar	16		
EMAIL	varchar	50		
EMAIL2	varchar	50		
MOBILE	varchar	16		
MOBILE2	varchar	16		
BIRTH_DATE	datetime	-		
REGISTRATION_DATE	datetime	-		
LANGUAGE_ID	numeric	2		
COMMENTS	varchar	255		
ACCESSIBLE_FROM	numeric	4		
ACCESSIBLE_UNTIL	numeric	4		
SDNI	varchar	50		

TEXT1	varchar	50		
TEXT2	varchar	50		
TEXT3	varchar	50		
NPreferentialChannel	numeric	2		
NUM1	numeric	10		
NUM2	numeric	10		
NUM3	numeric	10		

12.1.2 STRUCTURE OF THE TBDATACLIENT TABLE

tbDataClient			
NAME	**TYPE**	**SIZE**	
SUBJECTID	**numeric**	**10**	
key	varchar	40	
value	varchar	250	

12.1.3 STRUCTURE OF THE TBLOCATOR TABLE

tbLocator			
NAME	**TYPE**	**SIZE**	
LOCATORID	**numeric**	**10**	
SubjectId	numeric	10	
ordern	numeric	10	
typeId	numeric	2	
locator	varchar	16	
Comments	varchar	250	
call disposition Id	numeric	10	
consecutiven	numeric	2	
mainb	tinyint		

12.1.4 STRUCTURE OF THE TBCAMPAIGNSUBJECTIDENTITY TABLE

tbCAMPAIGNSUBJECTIDENTITY			
NAME	**TYPE**	**SIZE**	
SUBJECTID	**numeric**	**10**	
CAMPAIGNID	**numeric**	**10**	
Nstatus	numeric	3	
Nlist	numeric	3	
ASSIGNEDAGENTID	numeric	10	
MAXNUMCONTACTS	numeric	5	
NUMCONTACTSPENDING	numeric	5	
NUMCONTACTSCOMPLETED	numeric	5	
NUMCONTACTATTEMPTSCOMPLETED	numeric	5	
TNEXTCONTACT	datetime		
TLASTCONTACT	datetime		
TLASTCONTACTATTEMPT	datetime		
CALL_FROM	numeric	4	Numeric value corresponding to the contact start time for the record. E.g.: 900
CALL_UNTIL	numeric	4	Numeric value corresponding to the contact end time for the record. E.g.: 2100
TVALIDITYSTART	datetime		
TVALIDITYEND	datetime		
SECONDSUSEDUP	numeric	10	
Last Call Disposition ID	numeric	10	
nNumConsecutiveEndings	numeric	10	
IdLastTransaction	numeric	10	
Segment_Attribute	varchar	50	Alphanumeric value of the segment attribute. It allows segments to be defined later in the campaign starting from the different values of Segment_Attribute.
IdSegment	numeric	10	Static Segment
Priority	numeric	5	It indicates the priority (or order) in which this contact will be delivered to the agents, for the non-callback registry list. If not reported, the upload process enters 0 (Zero)

nTimeInterval	numeric	5	Duration of the punctuality interval, in minutes
tStartCall-BackAgent	datetime		
tEndCall-BackAgent	datetime		
nIncreaseCall-BackAgent	numeric	5	Wait time between attempts during the punctuality interval, in minutes
tDateCreation	datetime		
tModification	datetime		
userModificaction	varchar	50	
Texto1	varchar	50	
Texto2	varchar	50	
Texto3	varchar	50	
NStatusTransaction	numeric	9	
Num1	numeric	9	
Num2	numeric	9	
Num3	numeric	9	
nPreviousStatus	numeric	3	
nBurstCounter	numeric	5	

12.1.5 STRUCTURE OF THE TBDONOTCALL TABLE

tbDoNotCall			
NAME	**TYPE**	**SIZE**	
Locator	**varchar**	**16**	
CampaignId	**numeric**	**10**	**Value 0 for Global DNC**

13 GLOSSARY

Agent scripts (agent applications):

The Omni+ agent scripts are applications that help agents during contacts with the individuals at the other end of the line, showing them relevant data or pointing out what they need to say. Sometimes called also agent "applications."

Omni+ scripts are built with the Omni+ Developer.NET design tool.

Campaign:

The campaign is the main work unit in the Omni+ platform. The campaign parameters can be changed from Manager. The lists of client records to be contacted are associated to the campaigns. A campaign can belong to one or several services.

Connectors:

The DBR connectors are software modules that enable the DBR to route specific types of interaction, such as e-mail, twitter, webchat, WebService, etc.

CSV (Comma Separated Values):

It makes reference to a file format where information is stored for its export/import from/to a database, where the values of each line (registry) are separated by a comma.

Campaign quotas, segment:

It is possible to define quota limits so that when the limit is reached, the segment or the campaign automatically stop dial-up.

Additional data:

In addition to client data, other additional data of interest can be added to the Omni+ data module. Omni+ saves all the additional information in the **`tbClientData`** table and can be accessed and modified easily from the script or from an external application.

Status of a record:

A record within a list can have different statuses: 0-Available (Eligible), 100-Paused-User, 101-Derecorded-system, 102-Deregistries due to Daily Planning, 103-Derecord-manual, 200- Ongoing (Open transaction), 300- Completed

Strategies (static, dynamic, dbr-script, dnis):

The strategies allow to define to what campaign queue and with what parameters a call or interaction will be routed in a specific route point.

There are different types of strategies: Static DBR, allows to define such parameters as queue, priority, handicap, required skills, etc. Dynamic DBR in which routing is established through a consultation with an external CRM; DBR Script, in which each call performs a dynamic DBR script; DNIS or Switch-based routing, with routing established by the PBX.

Call disposition and Callbacks:

An ending is an action associated with the termination of a contact managed by the platform which allows to qualify the results of the call in terms of business. A call disposition can have callbacks, list changes and contact status changes associated.

Omni+ allows a complete management of sophisticated calls and call-back cycles making up the necessary platform to develop proper telemarketing policies.

Punctuality interval:

It is a function or algorithm that aims at optimizing the time for performing callback in order to increase the probability of a Useful Contact. Said algorithm readjusts the calls caused by telephone incidences (such as, does not answer, does not connect, etc.) as long as the record stays within a time interval. Said interval is known as punctuality interval, and is 60 minutes by default.

Record Lists:

The registries of clients to be called during a campaign are organized based on the following registry lists: 0-NON-CALLBACK, 1-SYSTEM CALLBACK and 10-AGENT CALLBACK

DNC Lists (do not call), also Robinson Lists:

Omni+ allows keeping a list with telephones that must be excluded from the outbound calling processes. This list is managed directly from the tbDoNotCall database table. Each entry in this table can affect one specific campaign or be global and affect all the campaigns in the system.

Administrator's messages:

An administrator user can keep a list of messages that are delivered to the Call Center agents. These messages are visualized sequentially in the “ticker” zone of the agent's application.

Incentive module:

The incentive module of Omni+ allows to define incentives and objectives for each agent in each campaign, and is a motivational tool that aids in supervising progress and performance.

It is based on the definition of “objectives” and “variables,” that increase automatically as the agents close transactions with the corresponding call dispositions.

Dial-up mode:

Omni+ supports different dial-up modes, that are associated to one campaign: Preview, Automatic Preview, Progressive, Predictive and Agentless dial-up.

In the progressive and predictive modes, the system will only transfer the successful contacts to the agents and the unsuccessful attempts will be automatically managed. The “agentless” dial-up mode starts calls that will be automatically answered by in IVR defined through a DBR-script.

Pause reasons:

When the agents request to go into not-available status, they should select one of the "pause reasons" that have been configured. Said pause reasons can be administered from Manager, at the service level.

Service object, service level:

In general, “Service level” is an indicator that reports on the speed at which inbound interactions are being served and, is specified as the percentage of calls served before a specified maximum waiting time (service objective) per the total number of calls.

Normally contact-centers establish minimum of service level agreements (Service Level Agreement, SLA). Example: to take a minimum of 80% of the calls in less than 30 seconds

Service Participation (oportpart):

A “service participation” is the user/service relationship that allows the user to connect to a specific service. Sometimes participations are also called “participation opportunities.”

Participations allow agents to connect to a service through the agent application whereas supervisors are granted permissions to access supervision functions related to the services.

User permissions (roles):

In Omni+, users' access permissions are organized through “roles.” Users can access different system modules and functions according to the roles they have been assigned. Each role includes the necessary permissions to perform one or more tasks. E.g.: “Total Control,” “Administer Campaigns,” or “Obtain Reports (per assigned services).”

Roles can be assigned individually to users or collectively to groups.

Workstation:

A workstation is the representation of the physical location from where the agent user accesses the system. The workstation generally has a terminal or telephone extension and a Windows PC.

Each workstation identifies itself in Omni+ from its “workstation name.” The relationship between the “workstation” and the corresponding telephone extension is established through Manager.

Localization Range

For each client record, Omni+ keeps the information of a time range or interval, so that it will only call the record within the time interval informed.

These intervals are defined based on two fields ACCESSIBLE_FROM/ ACCESSIBLE_UNTIL. The valid values are: ACCESSIBLE_FROM= 0 / ACCESSIBLE_UNTIL= 2400.

Client Records:

Based on Omni+'s perspective, a client or ‘subject’ is a person that can be contacted one or several times throughout a campaign.

In general, we talk about “client records” to refer to those records that are uploaded in an Omni+ campaign in order to generate outbound calls.

Relevant information about clients is kept in the database, mainly in the ‘clients’ and ‘tblocators’ tables.

DBR Scripts (or DBR applications):

Dynamic Business Router allows to define routing strategies in which the treatments given to multichannel calls and interactions are defined through a sequence of programmable steps that will generally be called DBR-Scripts.

These scripts can be edited visually with Developer.NET through a graphic interface that can be easily used.

The DBR-scripts help provide the proper treatment to the inbound calls, through IVR (Interactive Voice Response) type interactive treatments and speeches as well as help route them to the campaign waiting queue. During this treatment, information can be looked up in databases and external systems, with this the properties for an optimal routing based on business rules can be established.

Static Segments, dynamic segments:

The client record list of a campaign can be segmented in order to make its management easier. From this segmentation on, it will be possible to gradually control the campaign progress, pausing/activating segments of the lists, or indicating different relative priorities.

There are two types of segments: static and dynamic.

Service:

A service is the work context of an Omni+ agent and is made up of a set of campaigns and a set or users.

An agent can be authorized to work in several services. If this is the case, when connecting to the iAgent application, the agent must choose one of the potential services. Similarly, a supervisor can be authorized to supervise several services.

Services are administered from Manager.

Agent Skills (mandatory, optional):

A skill is an area of knowledge of an agent. Omni+ allows assigning a set of skills to each agent, as well as defining in each call-waiting queue strategy which skills are required whether mandatorily or optionally to treat each type of call.

User, user group:

A “user” is any person or system accessing Omni+ through its applications or through APIs. It is identified or authenticated by a username and a password.

Users can optionally be grouped in “user groups," which eases up management tasks.