MITEL

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SX-2000
LIGHT

ACD 2000 Agent/Supervisor/Senior
Supervisor Guide
for the Superset™ 4150

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General Information About this Guide

This guide describes operation of the Automatic Call Distribution (ACD) 2000 Feature Package on a SUPERSET 4150 telephone set. For further information on ACD, see "What is Automatic Call Distribution".

The displays shown throughout this guide are intended to be representative only. Certain displays on the sets may differ from those shown, usually based on what features or Class Of Service has been programmed into individual sets.

For operation of other features associated with a SUPERSET 4150 set (some of which will work in conjunction with ACD), refer to the set guide.

IMPORTANT NOTE FOR HEADSET USERS: MITEL's Headset with Feature Control Switch (PN 9132-800-500-NA) must be installed in the dedicated headset jack (the jack nearest the front of the set). Installation will disable your handset microphone. Disconnecting the headset at the jack or at the quick-disconnect plug restores handset operation.

What is Automatic Call Distribution (ACD)?

The Automatic Call Distribution (ACD) 2000 Feature Package is offered by the SX-2000 INTEGRATED COMMUNICATIONS System. ACD is a method of switching large volumes of similar calls directly to a selected group of extensions (Agents). Up to 350 such Agents can be supported. All calls are distributed equally among the Agents. The calls are all of a similar nature, and the Agents are trained/equipped to provide the particular information or service the caller is requesting.

Typical examples of ACD applications include:

- airline reservation offices
- telephone order desks for department stores
- customer service departments of telephone or cable T.V. companies

When there are more incoming calls than available Agents, the calls are routed to recordings. The recordings may advise the callers that all Agents are busy, and that an Agent will answer as soon as possible. Various recordings may be provided to inform the caller as to call progress if an Agent is not accessed immediately, or to advise the caller of information the Agent will require when connection is established.

The SX-2000 system also directs calls to the Agent so that all Agents are given an equal workload. A Supervisor usually oversees the operation, monitors the activity of the Agents, and handles unusual situations which may arise.

About Your SUPERSET 4150 Telephone
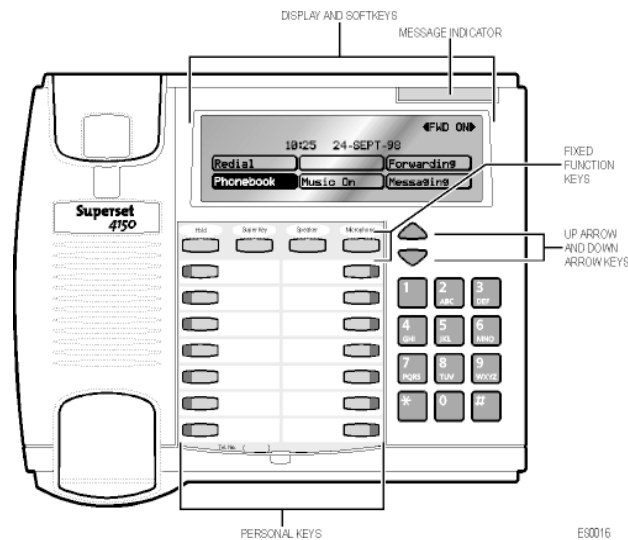
Personal Keys

At the bottom of your SUPERSET 4150 there are two columns of Personal Keys. The first Personal Key (the lower right-hand key) is your Prime Line key, the telephone line that you will usually use. Your extension number is the number of your Prime Line. Other Personal Keys can be programmed as Speed Call Keys, Line Select Keys or Feature Keys.

Line Select Keys

Your SUPERSET 4150 telephone can accommodate up to 14 lines, including your Prime Line (your listed number). A Personal Key can be programmed as a Line Select Key to access each line. Line appearances on your set may be shared with other extension users. However, you cannot intrude on any conversation that they are having without their permission, and they cannot intrude on any conversation you are having without your permission. Contact your System Administrator to have Line Select Keys programmed on your set.

What Are Line Appearances?

Several lines can be set up to "appear" at your SUPERSET 4150. Your own line is the Prime Line and it always appears at the lower right-hand Personal Key. Each line that appears on your set can be used as a separate telephone line.

Line Status Indicators

Individual Line Status indicators are located on the outside edge of each Personal Key. These Line Status indicators show you the status of the lines which you have programmed on your set.

If a Personal Key has been programmed as a Feature Key, the LED status indicator for that key will turn on when the feature is activated, and turn off when the feature is disabled.

When a line is...	the status indicator is...
Idle	off
Busy	solid on
Ringing	flashing slowly
On Hold at your set	flashing rapidly
On Hold at another set	flashing in a low on, fast off cycle on your set's Line appearance

Feature Keys

A Personal Key can also be programmed as a Feature for quick access to an often-used feature. When that key is pressed to turn on the feature, the status indicator for that key will turn on.

Contact your System Administrator to have Feature Keys programmed on your set.

Main Display

The main display, located at the top of your SUPERSET 4150, has six touch-sensitive Softkeys at the bottom and an information display area at the top. The Redial number, the name of the feature currently active, messaging information, and telephone system error messages are displayed in the information area.

When your telephone is idle, the current date and time of day are displayed continuously. As soon as you make or receive a call, the display shows information about that call, such as which line or trunk is being used, and the duration of the call. This is useful when you are charging the cost of a call to a customer or an account number.

The SuperKey and Softkeys

Softkeys are the six touch-sensitive keys appearing in the main display. The labels on these keys change depending on the call status or feature being accessed.

The *SuperKey* Function Key allows you to access the many features available through the Softkeys. When you press the *SuperKey* the main display changes. In particular, Softkey prompts in the lower half of the screen change. Prompts appear only when they can be used and if they are available to you.

While you are in a *SuperKey* session, you may press the **More...** Softkey to advance to the next display of Softkey prompts. To exit a *SuperKey* session, press the *SuperKey* on once more.

Function Keys

The Function Keys are located between the main display and the personal keys. A number of the SUPERSET 4150 features are accessed by using the Function Keys on your telephone.

1. **Hold** Key (red key): for placing calls on hold.

2. *SuperKey*: for programming Personal Keys as Speed Call Keys, accessing most set features, and displaying set information.

3. **Speaker** Key: for turning the set speaker on and off during handsfree operation.

4. **Microphone** Key: for turning the microphone on or off (a privacy feature) during a handsfree call.

5. **Up Arrow** and **Down Arrow** Keys: for changing the volume of the handset receiver, the speaker, and the headset, the volume and pitch of the ringer, and adjusting the contrast of the main display.

Feature Access Codes

Many features can be activated or disabled by Feature Access codes when no Feature Keys are programmed for this purpose.

Contact your System Administrator for these and other Feature Access codes available on your telephone system, or to have these features programmed into your set's Softkeys. Record your Feature Access codes in the Personal Directory table at the end of this guide.

Features Not Available

There may be procedures in this guide which you cannot perform on your telephone set, and your Softkey display may not appear exactly as in the illustrations in this guide. You may have Softkey prompts that are not shown in these illustrations, or you may not have all of the prompts shown here. You may have additional functionality not described in this guide, or some features described here may not be available to you. The reason for this is that your company has specially selected your features and calling privileges. See your System Administrator if you have any questions.

ACD 2000 AGENT FEATURES
AND
CAPABILITIES

What are Agent Groups?

ACD Agents are normally grouped together to handle incoming telephone calls that are associated with particular functions or departments in an organization; for example, Sales or Engineering. Callers are then directed to the Group that best serves their needs. The formation of ACD call Groups with two or more Agents in each Group then allows calls to be handled on a Group basis rather than on an individual basis. Agents can belong to more than one Group, however, they are allowed to log in to only one Agent Group at a time.

Agent Groups are assigned a unique 3-digit Identification (I.D.) number as well as an Agent Group directory number. You will use both of these numbers as discussed throughout this guide.

Agent Groups can be programmed to overflow between each other. This means that if activated, calls that are directed to one Agent Group can be programmed to overflow to other Agent Groups if the first Group was unavailable due to being in an overload condition. This overflow capability allows ACD calls to be handled, even though an Agent Group has been set in a Do Not Disturb mode.

You can have your set programmed to receive additional information concerning Group activity. This information is called Queue Threshold Alert and Queue Status.

The following Agent functionality is described in this section:

Logging In describes the procedure for logging in to a telephone set programmed for Automatic Call Distribution (ACD).

Displaying Agent Log-In Information describes the procedure for displaying your Agent I.D. number for verification after logging in.

Logging Out describes the procedure for logging out from a telephone set programmed for ACD.

Answering Calls describes the procedure for answering ACD calls.

Using the Auto Answer Feature describes the feature which allows you to answer calls automatically after one short ring.

Using A Headset describes the procedure for installing and programming a headset for hands-free call answering.

Using and Canceling the Work Timer describes the purpose of the Work Timer and the procedure for answering calls without waiting for the Timer to expire.

Taking a Break from Calls (Make Busy Feature) describes the procedure for placing your set in a pause mode when you need to be away from your set for brief periods of time, without the need to log out and subsequently log in again.

Getting Help describes the procedure for requesting assistance from your Supervisor during a call.

Canceling Help describes the procedure for terminating a Help request.

Queue Threshold Alert / **Queue Status** describes alert indicators and means of accessing queue information for regarding the status of the ACD Group (Queue) into which you have logged.

Logging In

Automatic Call Distribution (ACD) calls are directed to Logged In Agents only. ACD calls are not directed to a telephone set where there is no Agent Logged In. You can log in by following the procedure described below.

An important concept in the ACD 2000 system for you to be aware of is Agent mobility. Since you as an Agent are assigned an Identification (I.D.) number to log in with, you can be called by this I.D. number, as well as by the telephone set extension number from where you are working. This means that you can be called by your I.D. number regardless of where you may be located. For this reason it is also a good idea for your Agent I.D. number to be included in your company's telephone directory.

You can log in to only one Group at any one time. Check with your manager if you do not know the ACD Log-In access code or if you do not have an I.D. number. The Agent I.D. number is unique to each Agent, and allows the system to distribute ACD calls to Logged In Agents. An Agent can stay logged in indefinitely on the same telephone set. You can also log in by using a special Feature Access code not explained in this guide.

After you have logged in, you can display your Log-In information. Refer to "Displaying Agent Log-In Information" for further details.

When You are Ready to Log In

To log in, perform the following tasks:

1. From the Idle display, press the **ACD** Softkey.

2. Press the **Agent Log In** Softkey.

3. Enter your Agent Identification (I.D.) code on the keypad. Use the ← Softkey to correct any digits you entered incorrectly.

*NOTE: The ← and the **Enter** Softkeys will appear when you start typing the Agent I.D.code.*

4. Press the **Enter** Softkey. You are now logged in. The display shows the name programmed against the Agent I.D. in the telephone directory. Ensure that the correct Agent I.D. was entered.

   After 3 seconds, the display returns to Idle (time and date is displayed) with any programmed Softkey features appearing on the display.

If the I.D. is in use by another Agent, then the display shows a BEING USED BY error message for 5 seconds and your Log-In attempt is terminated.

If the I.D. contains invalid digits (* or #), the display shows an INVALID NUMBER error message for 5 seconds and your Log-In is terminated.

The **Backup** Softkey terminates the Log-In procedure without logging you in.

NOTE: If an Agent Log-In code is dialed, but no I.D. is entered within 20 seconds, the Log-In procedure is not activated and the set is treated as a Logged Out set.

Displaying Agent Log-In Information

It is possible to display and verify Log-In information when you are logged into a set. The information displayed is the Agent I.D. number logged in to that set. This is accomplished by performing the following tasks:

1. Press the **Superkey**.

2. Press the **More...** Softkey until Display Keys appears on the display.

3. Press the **Display Keys** Softkey.

4. The Agent Identification (I.D.) number currently logged in is displayed for one minute.

5. If you now select the Prime Line key, the set displays the Prime Line Extension programmed against your set and the Agent I.D. currently logged in to the set.

6. To exit, press the ***SuperKey*** Function key.

Logging Out

Logging out returns the set to Logged Out state and it no longer receives Automatic Call Distribution (ACD) calls, since ACD calls are directed to Logged In telephone sets only. Your set operates normally for non-ACD use when logged out.

Logging Out can be activated during a call in progress, and takes effect only when you terminate (hang up) the call. This allows you to activate this feature before your set can ring again for another call.

When You Are Ready to Log Out

To Log Out, perform the following tasks:

1. From the logged in Idle display, press the **ACD** Softkey.

2. Press the **Log Out** Softkey. You are now logged out. After a few seconds, LOGGED OUT appears on the display.

Answering Calls

Answering Automatic Call Distribution (ACD) calls is not unlike answering regular calls on a SUPERSET 4150 set. When the telephone rings, the indicator beside your Line Select Key flashes.

To answer the call, pick up the handset and begin speaking.

A headset option can be programmed into your system, eliminating the need to pick up the handset. This is helpful in high call traffic situations normally encountered in an ACD environment. To use a headset, refer to "Using A Headset". You should also refer to "Using the Auto Answer Feature" for high telephone traffic situations.

Using the Auto Answer Feature

You may prefer to answer your calls automatically using the Auto Answer feature, for either handset or headset operation. Once programmed, when you receive a call you hear one short ring before being automatically connected to the caller.

Never leave your telephone unattended while the Auto Answer feature is turned on.

How to Activate Auto Answer

To activate the Auto Answer feature:

- Press the **Auto Answer** Feature Key. The indicator beside the light turns on.

How to Deactivate Auto Answer

To deactivate Auto Answer:

- Press the **Auto Answer** Feature Key. The indicator beside the light turns off.

Using a Headset

Note: *Your system administrator may have enabled full-time headset operation on your telephone. Telephones with full-time headset operation enabled must be operated only with headsets.*

Telephones that are not programmed for full-time headset operation will provide a **HEADSET** *key to allow you to switch between handset and amplified headset (no feature control switch) operation.*

Switching between handset and headset mode when using a Headset with Feature Control Switch can be accomplished by connecting or disconnecting the headset at the quick-disconnect plug on the headset cord, but you should also disable headset operation if the handset will be used for an extended period of time.

A headset can be used either in regular answer mode or with the Auto Answer feature programmed.

Most headsets are installed using the same jack that the handset plugs into. MITEL's Headset with Feature Control Switch (PN 9132-800-500-NA) plugs into the dedicated headset jack (the jack nearest the front of the set).

To Install a Headset (no Feature Control Switch)

To install the headset for your use, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Unplug the handset cord where it connects to the telephone.

3. Plug in the headset cord in the same place.

4. Set the telephone upright and return the handset to the cradle.

5. Press the **Headset** Feature Key.

6. Store your handset in a safe place.

To return to handset operation, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Unplug the headset cord where it connects to the telephone.

3. Plug in the handset cord in the same place.

4. Set the telephone upright and return the handset to the cradle.

5. Press the **Headset** Feature Key.

6. Store your headset in a safe place.

Handling Calls with a Headset (no Feature Control Switch):

To answer a call (when Auto Answer is disabled):

- Press the flashing Line Select key.

To hang up:

- Press the **Hang-Up** softkey.

To Install a Headset with Feature Control Switch

IMPORTANT NOTE: MITEL's Headset with Feature Control Switch (PN 9132-800-500-NA) must be installed in the dedicated headset jack (the jack nearest the front of the set). Installation will disable your handset microphone. Disconnecting the headset at the jack or at the quick-disconnect plug restores handset operation.

To install the headset for your use, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Plug the headset cord into the headset jack (the jack nearest the front of the set).

3. Set the telephone upright and return the handset to the cradle.

4. Press the **Headset** Feature Key.

To return to handset operation, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Unplug the headset cord where it connects to the telephone.

3. Set the telephone upright and return the handset to the cradle.

4. Press the **Headset** Feature Key.

5. Store your headset in a safe place.

Handling Calls with a Headset (with Feature Control Switch):

To answer a call (when Auto Answer is disabled):

- Press the flashing Line Select key
  -or-
  Quickly press and release the Feature Control Switch.

To mute the headset microphone:

- Press and hold the Feature Control Switch.

To hang up:

- Press the **Hang-Up** softkey
  -or-
  Quickly press and release the Feature Control Switch.

Using and Canceling the Work Timer

The Work Timer provides a delay after each ACD call, before the next call is directed to you. This gives you a certain amount of time to complete any work generated by the previous call.

The Work Timer is automatic and you are not required to perform any procedures to activate it. The length of time provided by the timer varies from 0 to 600 seconds, and is programmed only by the System Administrator.

Work Timers apply to ACD Agents and ACD calls only. Other calls to and from your set are made normally. If the Make Busy or Do Not Disturb features are activated at your telephone, the Timer is cancelled for that call.

Once you terminate an ACD call, WORK TIMER appears on the display for the duration of the Work Timer period.

When the Work Timer expires, WORK TIMER disappears from the display and you are ready to take another call.

You have the option of canceling the Work Timer and accepting another call before the Timer expires. Cancellation of the Timer affects only the next ACD call.

When You Need to Cancel the Work Timer

To cancel the Work Timer, perform the following tasks:

1. Press the **ACD** Softkey.

2. To cancel the Work Timer, press the **Cancel Timer** Softkey. You are ready to take another call.

Taking a Break from Calls
(Make Busy Feature)

The way to temporarily restrict your set from receiving calls is to activate the Make Busy feature. The main purpose of Make Busy is to relieve you from your Automatic Call Distribution (ACD) workload for relatively brief periods of time, thereby avoiding the need to log out and subsequently log in again. Make Busy ensures that an ACD set does not receive calls when you are unavailable. Make Busy applies to only ACD sets and to only those stations that have logged in as ACD Agents. Any set not logged in for ACD calls remains in the Logged out state until an Agent Log-In is performed.

Your SUPERSET 4150 set operates as a normal telephone set except for ACD use during the Make Busy state. You can activate this feature during a call in progress. The Make Busy state commences upon completion of that call. This allows you to activate this feature before your set can ring again for another call.

How to Activate Make Busy

To activate the Make Busy feature, perform the following tasks:

1. Press the **ACD** Softkey.

2. Press the **More...** Softkey to scroll (if necessary) until Make Busy appears. Press the **Make Busy** Softkey. Your set displays Make Busy until it is deactivated.

How to Activate Make Busy

To deactivate the Make Busy feature, perform the following tasks:

1. Press the **ACD** Softkey.

2. Press the **Clear Busy** Softkey to clear the Make Busy feature. The display returns to idle.

Getting Help

Whenever you are in a conversation on an Automatic Call Distribution (ACD) call, you have the ability to request Help from an ACD Supervisor. The type of help you receive initially is to have the Supervisor silently monitor the conversation. The caller is not aware that they are being monitored unless the Supervisor later decides to initiate a three-way conference, which can be done at any time during the call.

If a Supervisor has not logged in with an Agent Identification (I.D.) code, the Supervisor's extension number must be dialed (when prompted to do so). If a Supervisor has logged in with an Agent I.D. code, you can request Help without having to know the location, by dialing that Agent I.D. code (when prompted to do so).

A Supervisor's I.D. code or extension number can be dialed by using either the keypad or by having a Speed Call key programmed for this purpose.

When You Need Help

To request help, perform the following tasks:

1. From the Idle display, press the **ACD** Softkey.

2. Press the **More...**Softkey to scroll (if necessary) until Request Help appears.

3. Press the **Request Help** Softkey.

4. Enter either the Supervisor's Agent I.D. number or extension number.

   Your help request is automatically cancelled if you do not enter digits. Digits dialed in error can be erased with the ← Softkey.

5. Press the **Enter** Softkey. The word RINGING (along with the Supervisor's number and name, if programmed) appears, indicating that the Supervisor you requested is being called.

   When your call is answered by the Supervisor, RINGING disappears from the display, but the Supervisor's name and number remain.

To cancel the Help request before it is answered, refer to "Canceling Help".

Canceling Help

While waiting for the Supervisor to respond to your Help request, you can cancel the Help request before the Supervisor answers.

To Cancel Help

To cancel help, perform the following tasks:

1. Press the **ACD** Softkey.

2. Press the **Cancel Help** Softkey.

This cancels the request and you are prompted to enter a second Help number, if desired. Your Help request is automatically cancelled if you do not enter digits.

Queue Threshold Alert

Thresholds are programmed into the ACD system to provide a basis for alerting Agents and Supervisors that calls have waited longer than acceptable limits (thresholds) to be answered.

Sets programmed with a Generic Group **Queue Status** Feature Key can provide a visual indication of the current workload conditions of the Automatic Call Distribution (ACD) Group into which you are logged (Supervisors may have two or more Specific Group **Queue Status** Feature Keys and threshold alerts, allowing them to monitor activity in more than one Group). Your set may also be programmed to provide an audible alert that Queue Status has changed.

NOTE: Agents in the Logged Out, Do Not Disturb, or Make Busy states are not considered active Agents for the purpose of Queue Threshold Alert.

Visual Indications

If your set is programmed to provide a visual alert, the indicator beside the **Queue Status** Feature Key indicates the three levels of alert as follows:

- a solid indicator displayed beside the Line Select Key on your set indicates that the workload is below the first threshold limit programmed

- a slowly flashing indicator indicates that the workload is above the first but below the second threshold limit programmed

- a quickly flashing indicator indicates that the workload is above the second threshold limit programmed.

Audible Indications

For sets programmed for audible indications, the system provides the following different ringing patterns, depending on the threshold alert status:

- a single ring occurs when the longest waiting caller exceeds the programmed first threshold time interval

- a double ring occurs when the longest waiting caller exceeds the programmed second threshold time interval

- a single or double ring occurs when a previous threshold time interval is reverted to (i.e., when the longest waiting call is answered and the next longest waiting caller is in a different threshold level).

Queue Status

Agents may access the following queue-status information about their Group (Supervisors may query more than one Group):

- the number of active Agents in the Group

- the number of calls waiting for the Group (queue)

- the length of time that the longest call has been waiting for the Group.

NOTE: Agents in the Logged Out, Do Not Disturb, or Make Busy states are not considered active Agents for the purpose of Queue Status.

There are two means of accessing this information: through a programmed **Queue Status** Feature Key, or through the **Queue Status** Softkey.

Accessing Queue Status Information with a Feature Key

- If your set is programmed with a Generic Group **Queue Status** Feature Key, press the key to display information about the Group into which you are logged (for Supervisors, press the appropriate Specific Group **Queue Status** Feature Key).

Accessing Queue Status Information with Softkeys

To display Queue-Status information using Softkeys, perform the following tasks:

1. From the idle display, press the **ACD** Softkey.

2. Press the **More...** Softkey (if necessary) until the **Queue Status** Softkey appears.

3. Press the **Queue Status** Softkey.

4. Enter the Group number.

5. Press the **Display Info** Softkey.

6. To exit, press the *SuperKey* Function Key.

ACD TELEMARKETER 2000 SUPERVISOR FEATURES AND CAPABILITIES

What is the Supervisory Position?

The Automatic Call Distribution (ACD) Supervisor position is for individuals who are responsible for the supervision of one or more Agent Groups. All Supervisor-related functions are programmed into the system by the System Administrator. While Supervisors can log in as Agents to perform similar activities, they have additional capabilities in order to support and monitor ACD Group activities. A Supervisor need only log in if they are performing Agent activities to answer ACD calls.

Several management and reporting statistics and information can be produced by the SX-2000 system, but are beyond the scope of this guide. Supervisors should consult with the System Administrator concerning the availability of other management tools.

The following Supervisor functionality is described in this section:

Queue Threshold Alert / Queue Status describes the meaning of threshold alert indicators and the means of accessing queue information for specific groups.

Silent Agent and Group Monitoring describes the procedure for silently listening to Agents' calls, and lists the benefits of and restrictions to this feature.

Conferencing describes the procedure for joining into a three-way conversation with an Agent and a caller under Silent Monitor.

Responding to Help describes the procedure for answering a Help request made by an Agent.

System Reporting Capabilities briefly describes the two types of reports that can be produced by the feature package. These reports can be used by management to study the effectiveness of the ACD operation:

- Real Time Events Records
- Station Message Detail Recordings

Queue Threshold Alert / Queue Status

Supervisors may need to be alerted when any of two or more Agent Groups have exceeded programmed limits. For this reason, Supervisors may have two or more Specific Group **Queue Status** Feature Keys programmed on their set, each dedicated to a different Group's activities. Their operation and the alerts associated with them are the same as Generic Group **Queue Status** Feature Keys, which are detailed in "Queue Threshold Alert" and "Queue Status" in the Agent Features and Capabilities section of this guide.

Silent Agent and Group Monitoring

Silent monitoring allows you to listen to conversations between Agents and ACD callers, or between Agents and ACD callers in conference with a third party, in one or more Agent Groups.

Benefits of Silent Monitoring

Silent monitoring can be done either with or without an Agent's knowledge, depending on how the ACD system Class of Service was programmed. If Agent notification has been programmed, the Agent you are monitoring will receive a Conference tone at the start of the monitoring period. Agents can only be monitored by one Supervisor at a time. When you are monitoring an Agent, neither the Agent or the ACD caller can hear you. During Agent monitoring, you can join into the conversation by initiating a "Conference" as described later in this guide.

Restrictions to Silent Monitoring

- While monitoring, you cannot be interrupted by previously-activated features such as Camp On or Callback.

- During monitoring, you temporarily lose Auto Hold, Soft Hold, Phonebook features, and the Call Prompt on your set.

- A call cannot be transferred to you while you are monitoring

- An Agent who has a call on Soft Hold cannot be monitored.

- You cannot commence Agent monitoring if you have a call on hold.

- You cannot monitor calls that are directed to a recorded announcement, until the ACD caller has been answered by an Agent.

- If you establish a conference during Silent Monitoring, you will not be placed automatically in Silent Monitor mode once the conference has ended. You must start over and re-establish Silent Monitoring following termination of the Conference.

- If you are responsible for monitoring more than one Agent Group, you must exit the Silent Monitor feature for the Group you are presently monitoring and then re-establish it for the next Group you want to monitor.

- You cannot monitor a set that is already being monitored.

- You cannot monitor an agent ID if it is not logged in anywhere.

- You cannot monitor an agent group if none of the agents in the group are logged in.

- You cannot silent monitor someone who is currently silent monitoring someone else.

Using Silent Monitoring for Individual Agents

To establish this type of Silent Monitor, perform the following tasks:

1. Lift the handset and listen for dial tone.

2. Press the **ACD** Softkey.

3. Press the **Monitor** Softkey or enter the Silent Monitor Feature Access code.

4. Enter the Agent Identification (I.D.) Number or Extension number of the Agent you want to monitor and press the **Enter** Softkey. If no conversation is taking place, you hear silence, and the display shows WTG followed by the Agent's number.

5. If a conversation is in progress, or begins, you hear a conference tone prior to the conversation, and the display shows the Agent's number and the Agent's name.

   When the conversation ends you receive Conference tone followed by silence until the next conversation begins. To join the conversation being monitored, refer to "Conferencing" later in this guide.

6. To exit Silent Monitoring, hang up your telephone.

Using Silent Monitoring for Agent Groups

To establish this type of Silent Monitor, perform the following tasks:

1. From the Idle display, lift the handset and listen for dial tone.

2. Press the **ACD** Softkey.

3. Press the **Monitor** Softkey or enter the Silent Monitor Feature Access code.

4. Enter the Agent Group Number you want to monitor. If no conversations are taking place in the Group, you hear silence and the display shows WTG, followed by the Group number and name.

   If a conversation is in progress or begins, you hear Conference tone prior to the conversation, and the display shows the Group number and Name as well as the Agent extension number, Agent I.D. number, and Agent name.

   When the conversation ends you receive Conference tone followed by silence until the next conversation begins. To join the conversation being monitored, refer to "Conferencing" later in this guide.

   You may monitor a different Agent in the group by pressing the **Next Agent** Softkey. There is a brief period of silence between the removal of the first monitor and the creation of the second. When the **Next Agent** Softkey is pressed, and there are no other conversations in the group, you are returned to the original conversation.

5. To exit Silent Agent Group Monitoring, hang up your telephone.

Conferencing

This feature allows you to join into a conversation that is being monitored. You, the Agent, and the ACD caller are joined in conversation. All parties hear the Conference tone when you start the Conference.

Starting a Conference

1. Establish a Silent Agent or Group Monitor as explained under "Silent Agent and Group Monitoring".

2. Press the **Conference** Softkey to join the conversation. Silent Monitoring ends when the Conference begins.

3. To exit the Conference, hang up your telephone. You must start over and re-establish Silent Monitoring, as described under "Silent Agent and Group Monitoring", following termination of a Conference.

Responding to Help

As a Supervisor, Help requests are made to you by Agents under your supervision. These Help requests are initially for you to silently monitor a conversation in progress. Once you are monitoring your Agent and a caller they are in conversation with, you have the ability to remove your Silent Monitor and actively join the conversation in progress. You also have the option of discontinuing the Silent Monitor mode that was established when you responded to the Help request.

Help requests override any Call Forwarding, Do Not Disturb or Re-routing that may have been established on your set. A Help request does not respond to Call Pickup from other sets.

If you are currently monitoring an Agent who requests Help from you, a delay of 5 seconds takes place at the Agent's set prior to the Agent's indication that Help is in progress. This is done so that the Agent doesn't necessarily know that monitoring was in progress.

If you are monitoring an Agent that requests Help from a Supervisor other than yourself, you receive a Conference tone, are temporarily removed from your monitor status, and return to the WAITING display on your set This Conference tone indicates that this is not the normal completion of a call. When this Help session is completed, the original monitor is re-created and you receive Conference tone again to indicate that the active monitor condition has resumed.

If you have Logged In as an Agent in addition to your supervisory role, Agents are able to request Help from you without knowing your location by using your Log-In I.D. number. This allows you to move freely from station to station. If you decide to log out during a Help or Silent Monitor session, the Log Out does not affect the session in any way until you hang up.

What Happens in a Help Request

When you receive a Help request from an Agent, your set emits a triple ring. The I.D. number and name (if programmed) of the Agent requesting Help is displayed, followed by REQUESTING HELP.

To respond to the Help request:

1. Pick up your handset. Your set automatically goes into Silent Monitor mode and you hear the conversation in progress. REQUESTING HELP disappears from your display, but the Extension number, I.D. number, and name (if programmed) remain. Also displayed is the **Conference** Softkey.

   At any time during monitoring, you can either initiate a Conference or exit from the Help mode.

   To initiate a Conference, press the **Conference** Softkey on your set. The display shows 3 PARTY CONFERENCE. You are now in conference with the Agent and any other callers they are speaking to.

2. To exit from Help or Conference modes, hang up your telephone. The display returns to Idle.

System Reporting Capabilities

The SX-2000 system is capable of producing many reports that can be used as management tools to study the effectiveness of the ACD operation. These reports may be presented in a variety of ways based on the software package used to generate them.

The categories of reports that pertain to ACD are Real Time Events Records and Station Message Detail Recordings (SMDR). It is beyond the scope of this guide to discuss these reports in detail, however a brief description of them is included to summarize their intended use.

Time Events Records

Real Time Events Records are used to record the activity of the entire ACD operation, and are available from the System Administrator. These records are divided into two groups: Call Events and Group Statistics Events. Call Events report on individual ACD Agent activity, while Group Statistics Events provide a cumulative report on Group congestion.

Call Events

As ACD Agent activities occur, a report is generated to show the following:

- Agent Log-In: records each time an Agent successfully logs in

- Agent Log Out: records each time an Agent successfully logs out

- Set Do Not Disturb (DND): records each time a set is placed in the DND state

- Remove DND: records each time a set is removed from the DND state

- Set Make Busy: records each time a set is placed in the Make Busy state

- Remove Make Busy: records each time a set is removed from the Make Busy state

- Answering incoming ACD calls: records each time an Agent answers an ACD call that was directed to a Group, and includes the Agent I.D. number, extension number and Group number

- Answering personal incoming calls: records each time an Agent originates a call and enters into a conversation

- Agent Idle: records the time when the Agent Work Timer expires or was cancelled. If the Work Timer is not in effect, the end of each call or the start of the Work Timer is recorded.

Group Statistics Events

The Group Statistics Events provide a cumulative report on Group congestion. A record is generated every time an Alert threshold level is crossed (either up or down). The events are generated every 15 seconds. If threshold levels are not crossed, a record is generated every 60 seconds.

Station Message Detail Recording (SMDR)

SMDR contains additional details about call re-routing and call transfer. The following descriptions pertain to ACD-related SMDR reports:

- Digits Dialed in a Trunk: records each time a call is re-routed or forwarded
- Time to Answer: records the total time to answer a call
- Transferred Calls: records each time a call was transferred.

Personal Directory

Your Extension Number:_____

Your Agent I.D. Number:_____

Your Supervisor I.D. Number:_____

Your Group Name/Number:_____

Use this table to record your frequently used numbers.

Name	Number

Use this table to record the feature access codes you are most likely to need on your telephone set.

Feature	Access Code
Auto Answer	
Do Not Disturb	
Headset Operation	
Make Busy	