

Call Management

Web User guide

Bespoke IVR Services

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Date	15 th July 2014		
Abstract			

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Document Control

1.1. Change History

Issue	Changed By	Change Date	Reason for Change
1.0	J Whittaker	15 th July 2014	Release

1.2. Document Approval

In accordance with Customer sign off and internal DOAG

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2. Initial Logon

After successfully logging into the Portal, search for the relevant ID, either by querying the number or by querying the ID.

At various points there are hyperlinks that will point to either a resource (if in a module) or a module (if in a resource).

Users must have the correct permissions applied to their profile in order to manage bespoke services. These can be either 'Read Only' or 'Read Write'.

- 'Read Only' will allow users to view the settings only and users will not be able to make any changes.
- 'Read Write' will allow users to view the settings and users will be able to make any changes.

If the set up has common elements (Common Box), a button 'View Common' will appear in the menu on the right-hand side.

A screen similar to below will be displayed. The actual modules displayed for any given service will be wholly dependant on the set up of that IVR.

The screen is split into four sections, Inbound Service, Bespoke IVR, Modules & Resources.

For example, a Destination Module could have a Queue as Resource.

To amend either a Module or a Resource, click on the 'Modify Service' button on the righthand side of the screen, then click on the 'Edit' button to the left of the item to be edited.

This will need to be repeated for each item that is to be amended.

The screenshot displays the 'Portal Inbound Services' interface. It is divided into several sections:

- Navigation Menu (Left):** Accounts, Management Tools, Numbers, Orders, Products & Services, Reports, Users.
- Inbound Service (ID:1872334):**
 - Type: Bespoke IVR
 - Description: Opal Internal IVRs/Iriam Portal Test/Start
 - Created on: 17 Jul 2012 11:19:57
 - Replay: Enabled
 - Agent: DISE MDT
 - State: Active
 - Last updated on: 05 Feb 2014 14:38:08
- Bespoke IVR (Customer:001238 Box:0027 Start:0001):** (Empty section)
- Service Modules:**
 - Module Type: All
 - Table with columns: Module Type, Description, Destination.
 - Records: 18 (Page 1 of 4)
- Resources:**
 - Resource Type: All
 - Table with columns: Resource Type, Description.
 - Records: 6 (Page 1 of 2)
- Service Tasks (Right):**
 - View Service
 - View Common
 - View Connected Numbers
 - View Reports
 - View Accounts
 - View IVR Account Details
 - View Related Services
 - View Real Time Queue Stats
 - Edit Service Information
 - Modify Service
 - Modify Common
 - Connect Service
 - Disconnect Service

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2.1 Service Task Panel

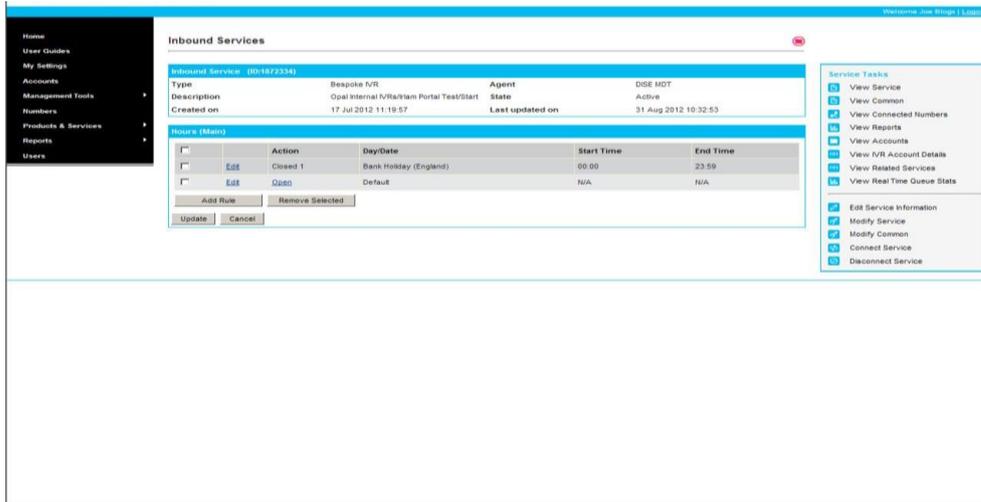
- View Service.
 - Returns to view only screen of service.
- View Common.
 - If there are common elements, goes to view only screen of view functions.
- View Connected Numbers.
 - Shows NGNs / Geo Fix Nos connected to service.
- View Reports.
 - Goes to IVR Reports screen.
- View Accounts.
 - Shows Portal account / s the ID is assigned to.
- View IVR Account Details.
 - Shows Accounts & PINs for recording messages.
- View Related Services.
 - If an IVR is created with multiple ID, this will show all related IDs.
- View Real Time Stats.
 - Launches new window for running graphs showing queue stats.

- Edit Service Information.
 - Allows the name of ID to be amended.
- Modify Service.
 - To make any changes to settings this must be selected.
- Modify Common.
 - To make any changes to common settings this must be selected.
- Connect Service.
 - Connects Inbound numbers to service.
- Disconnect Service.
 - Disconnects Inbound numbers to service.

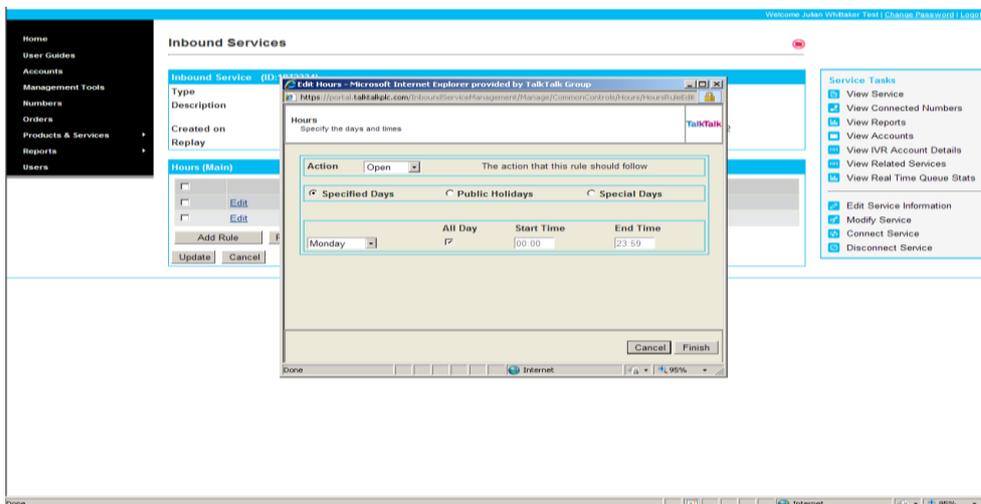
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3. Adjust Out Of Hours Settings

On selecting the Edit Hours Module, the following screen is presented:-



To add a rule click on 'Add Rule' or click 'Edit' against an existing rule, the following pop up screen will appear: -



From this screen the values that can be edited are:-

- Action
- Time Periods
- Weeks / Days

Click on 'Finish' then 'Update' to activate changes.

Repeat the above for each separate period

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3.1 Hours Logic

The logic for the hours settings is as follows:-

1. Special days
2. Bank holidays
3. Named days Sunday, Monday etc.
4. Weekdays / Weekends
5. All days
6. Default

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4. Adjust Queue Settings

On selecting the Edit Queue Resource, the following screen is presented: -



From this screen the values that can be edited are: -

- Queue Limit (1 to 100)
- Queue Time (10 to 9999, in seconds)
- Call Limit (2 to 100)

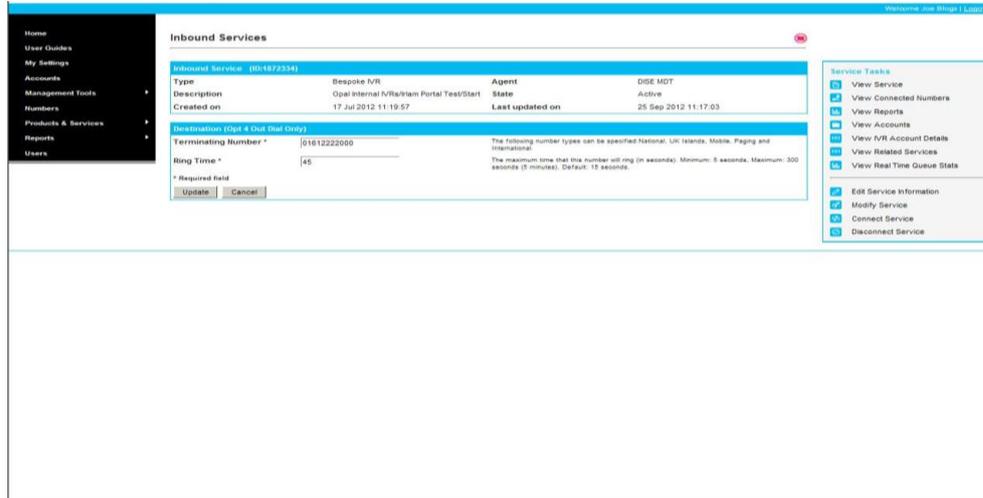
Click on 'Update' to confirm settings.

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5. Adjust Destination Settings

5.1 Termination Number only

On selecting the Edit Destination Module, the following screen is presented: -



From this screen the values that can be edited are: -

- Termination number
- Ring Time (10 to 180, in seconds)
- Replay (On or Off)

The termination number can be any valid UK landline number (international & mobile numbers can also be entered if the permission has been requested.

(A request must be placed with the service provider to enable these permissions.)

The 'Ring Time' is how long the termination number will ring before the next action is taken as defined by the IVR set up. This is a numeric value in seconds (10 to 180).

To enable or disable Replay from the module, check the tick box to enable, uncheck to disable. Click on 'Update' to activate changes.

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5.2 Call Plan

On selecting the Edit Destination Module, the following screen is presented: -

The screenshot shows the 'Inbound Service Management' interface. The main content area is titled 'Destination (Opt 3 Call Plan Only)'. It contains the following fields and options:

- Routing Code:** 3200
- Terminating Number:** Call Plan (PSG Injam Test Opt 3)
- Ring Time:** 300 (with a dropdown arrow)
- Replay:**
- Call Attempts:** 2
- Hold Time:** 10

There are 'Update' and 'Cancel' buttons at the bottom of the form. A 'Service Tasks' sidebar on the right lists various actions like 'View Service', 'View Common', 'Edit Service Information', etc.

From this screen the values that can be edited are: -

- Ring Time (10 to 180, in seconds)
- Call Attempts (2 to 250)
- Hold Time (10 to 60, in seconds)

The 'Ring Time' is how long the termination number will ring before the next action is taken as defined by the IVR set up. This is a numeric value in seconds (10 to 180).

The 'Call Attempts' is how many times the IVR will make dial attempts to termination numbers in the Call Plan before the next action is taken as defined by the IVR set up.

The 'Hold Time' is the length time the call is held in the network inbetween making 'Call Attempts'.

To edit the Call Plan, click on Call Plan Name next to the terminating number field or select the Call Plan from the resource menu. The following screen will be displayed: -

The screenshot shows the 'Inbound Services' interface. The main content area is titled 'Call Plan (PSG Injam Test Opt 3)'. It contains the following options and a table:

- Options:**
 - Order:** Longest Waiting (dropdown)
 - Home Working:**
 - Loop:**
- TLIs Table:**

Edit	Dest 1	Terminating Number	Description	Replay	Logged In
		01925554725	Test	Disabled	

There are 'Update' and 'Cancel' buttons at the bottom of the form. A 'Call Plan Tasks' sidebar on the right lists actions like 'View Call Plan', 'View Call Plan Usage', etc.

From this screen the values that can be edited are: -

- Order
- Home Working

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- Loop

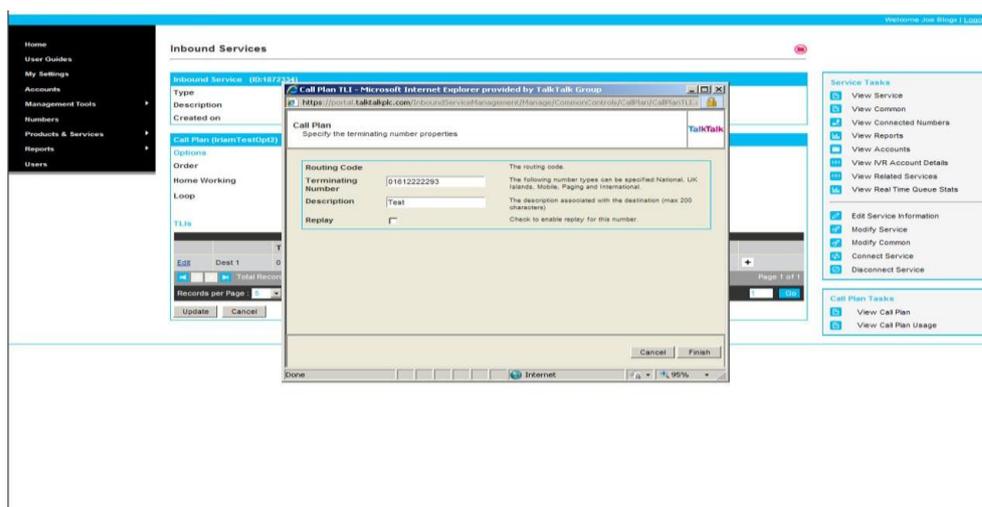
The 'Order' function allows different methods of call presentation to be selected. Termination destinations can be selected either on a sequential basis know as 'Indexed' (looks down a list) or 'Longest Waiting' (looks for termination number that has waited longest for a dial attempt) from a drop-down menu.

If the 'Home Working' box is checked, this allows users to login or out of the Call Plan using the web interface.

If the 'Loop' box is checked, this is to check to go back to the start of the Call Plan if the end of the list is reached.

Termination numbers (TLIs) can be edited, added, removed or reorganised.

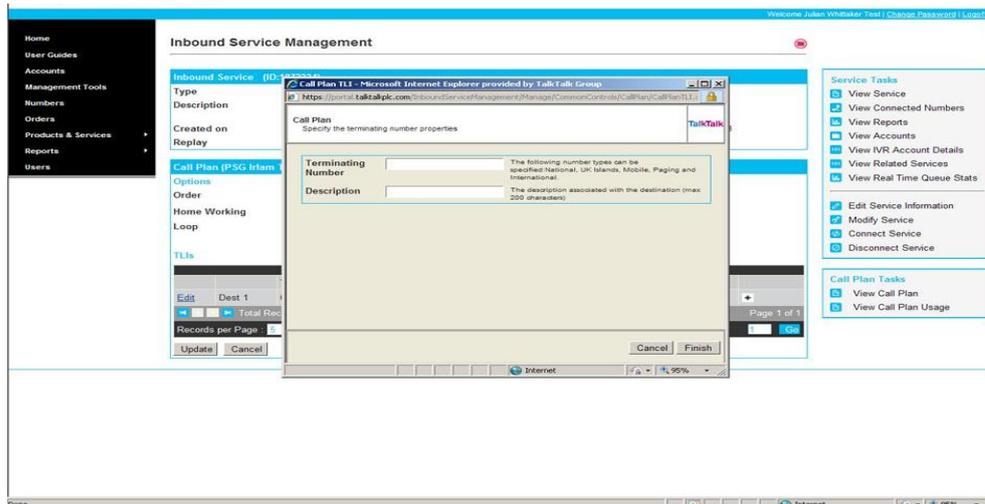
To edit a TLI click on the 'Edit' button. The following screen will be displayed: -



Enter the new TLI then click 'Finish' then 'Update' to activate change.

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To add a new TLI click on the 'Plus' (+) next to the existing TLI. The following screen will be displayed: -



From this screen the values that can be edited are: -

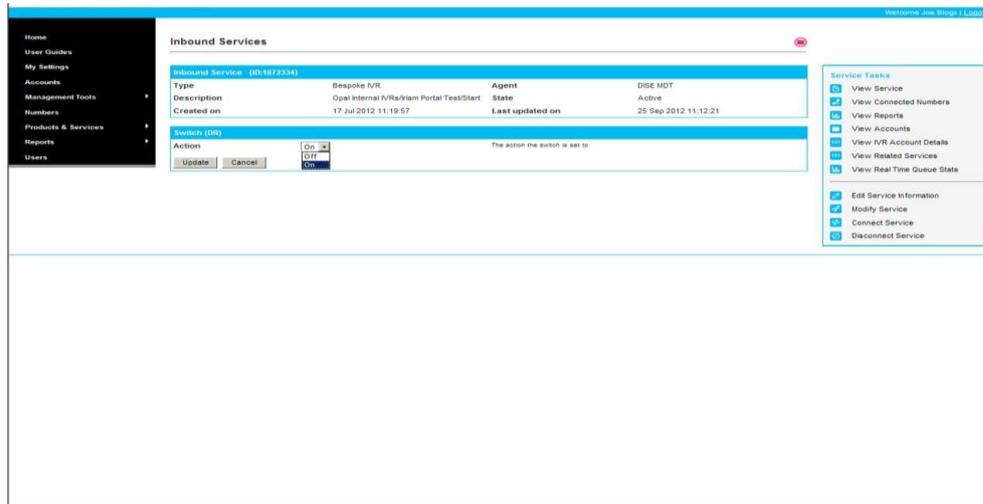
- Terminating number
- Description

Enter the new data then click 'Finish' then 'Update' to activate change.

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6. Adjust Switch Settings

On selecting the Edit Switch Module, the following screen is presented: -



From this screen the values that can be edited are: -

- Switch Actions

From the 'Action' drop down menu all the options available to the particular switch selected will appear.

Select the option required then click on 'Update' to activate change.

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7. Verification Module

On selecting the Edit Verification Module, the following screen is presented: -



From this screen the values that can be edited are: -

- Verify Type

Select the option required then click on 'Update' to activate change.

To edit the Verify Set, click on Verify Set Name next to the Verify Data field or select the Verify Set from the resource menu. The following screen will be displayed: -

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7.1 Verify Set

On selecting the Edit Verify Set Resource, the following screen is presented: -

From this screen the values that can be edited are: -

- Maximum Length
- Edit Data
- Add Data
- Delete Data

To edit the Maximum Length, enter the new data, click on 'Update' to activate change.

To edit an existing entry, click on 'Edit', the following screen is presented: -

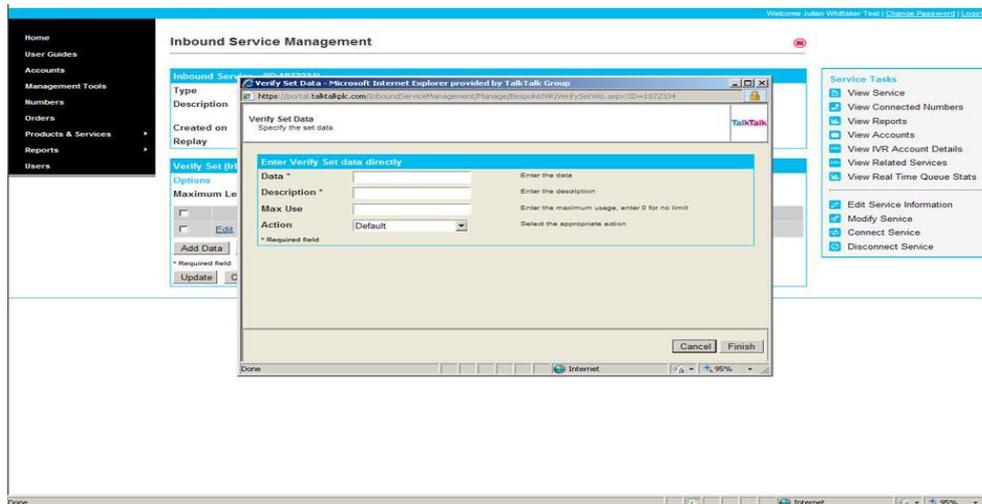
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From this screen the values that can be edited are: -

- Description
- Maximum use
- Action

Enter the new data then click 'Finish' then 'Update' to activate change.

To add new data click on 'Add Data' button, the following screen is presented: -



From this screen the values that can be edited are: -

- Data
- Description
- Maximum use
- Action

Enter the new data then click 'Finish' then 'Update' to activate change.

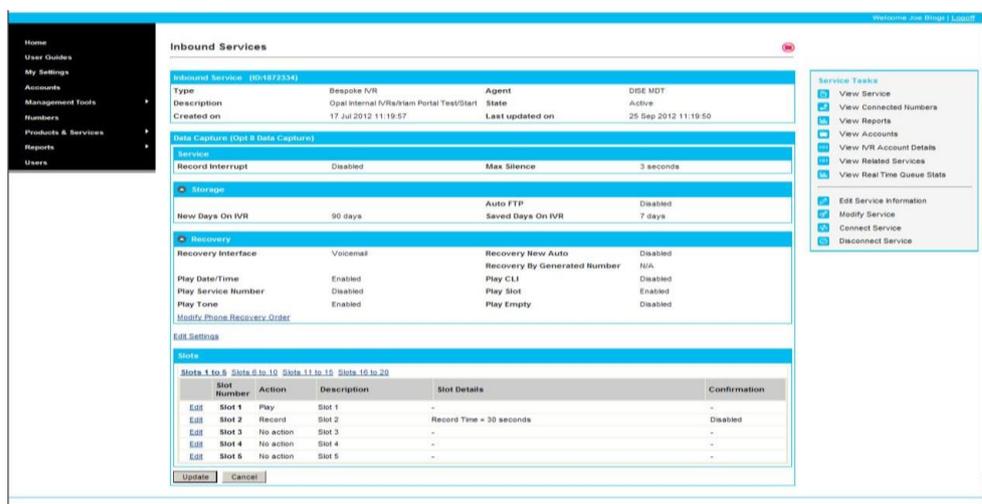
To delete data, check the tick box next to the data to be deleted, then click on 'Delete Selected Data'.

Click 'Update' to activate change.

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8. Data Capture Settings

On selecting the Edit Data Capture Module, the following screen is presented: -



To edit a slot, click on 'Edit' next to the slot to be amended. The following screen is presented dependant on current setting: -

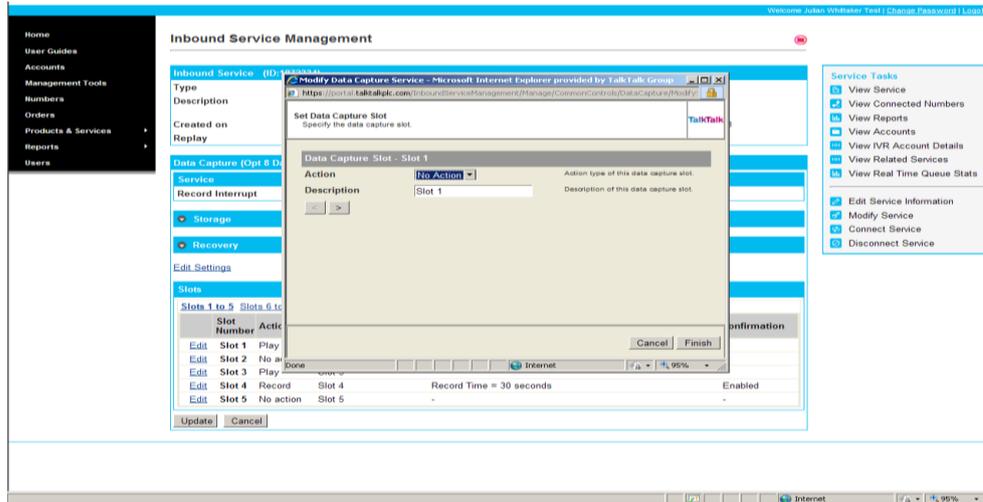
From these screens the values that can be edited are: -

- Action
 - No Action
 - Description
 - Get Digits
 - Description
 - Message Interrupt
 - Data Tone
 - Data Type
 - Minimum, Maximum & Confirmation
 - Play
 - Description
 - Message Interrupt
 - Record
 - Description
 - Message Interrupt
 - Record Tone
 - Record Time
 - Confirmation
- Description

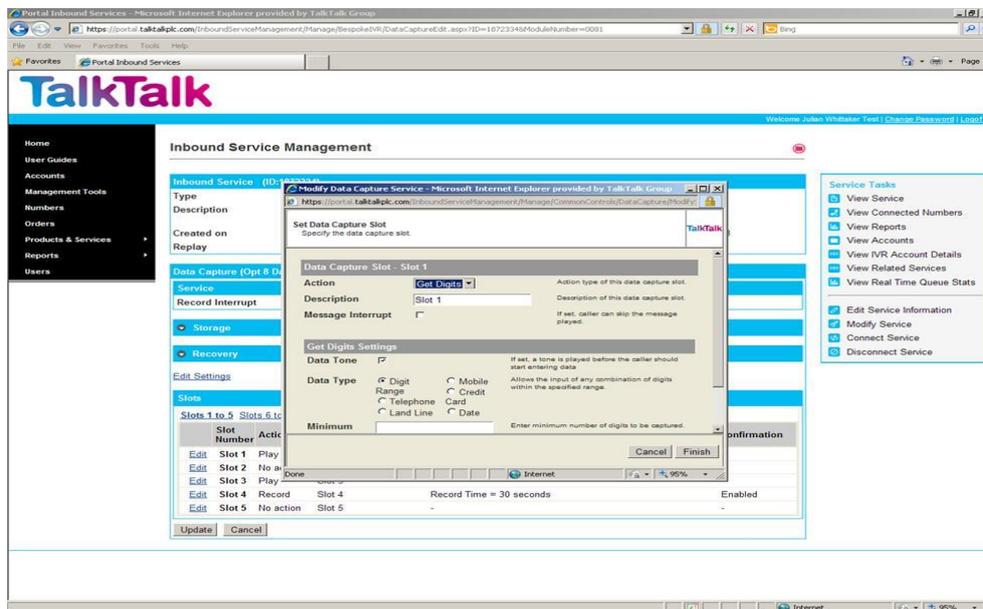
There are scroll buttons (< & >) to move forward or back a slot.

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If slot set to 'No Action': -

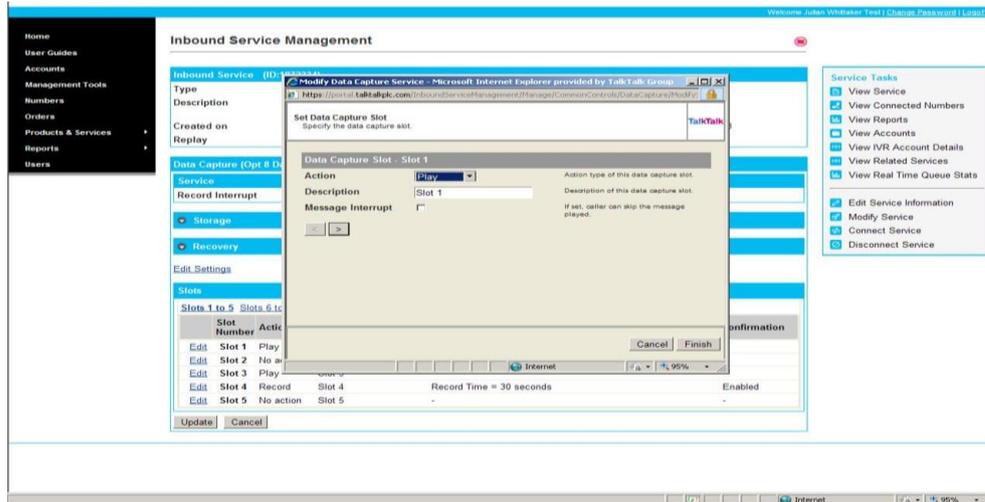


If slot set to 'Get Digits': -

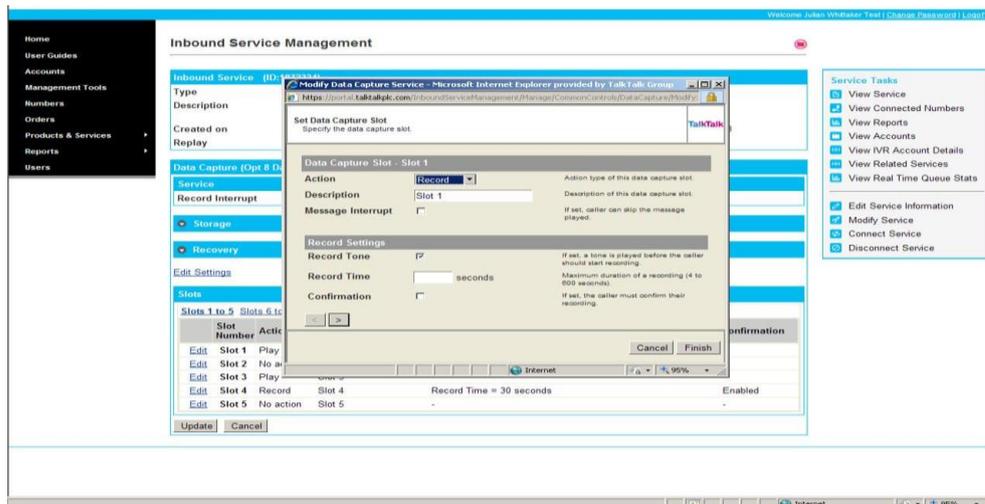


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If slot set to 'Play': -



If slot set to 'Record': -



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9. Call Ratio

On selecting the Edit Ratio Module, the following screen is presented: -



From this screen the values that can be edited are: -

- Rules
- Rule percentage
- Distribute evenly

Up to 9 rules can be applied. A rule can be added by clicking on the 'Plus' (+) sign on the last rule or removed by clicking on the 'Minus' (-) sign.

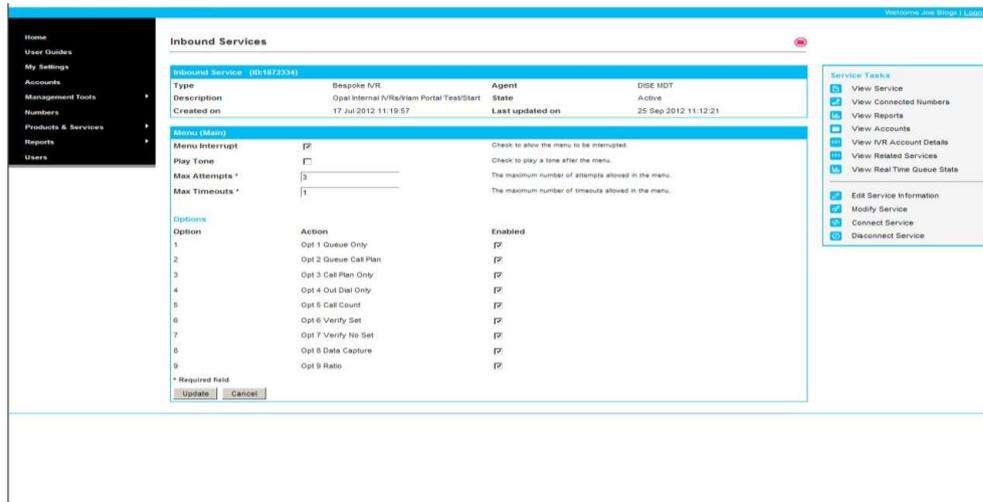
Percentage can be set for each rule; all rules must total 100% when added together.

If an even split is required against all rule, checking 'Distribute Evenly' will automatically work out the percentages.

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10. Menu Settings

On selecting the Edit Menu Module, the following screen is presented: -



From this screen the values that can be edited are: -

- Menu Interrupt (this allows callers to select an option whilst the menu message is being played)
- Play Tone (this plays a tone at the end of the menu message)
- Max Attempts (This is how many times a caller is allowed to enter an invalid option)
- Max Timeouts (This is how many times the menu message will be played when no input has entered by the caller)
- Options

For Options there are three fields are shown: -

- Option No
- Option Name
- Enable Check box

The Menu Interrupt & Play tone are click boxes to enable or disable the function.

Max Attempts and Max Timeouts are numerical values (1 to 5).

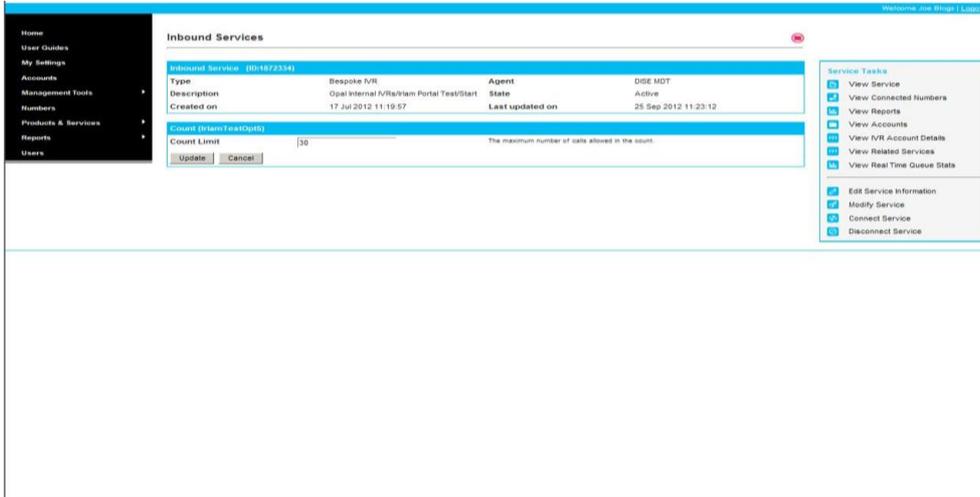
To enable an option, check the appropriate box, to disable an option uncheck the appropriate option.

Click on 'Update' to activate any of the above changes.

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11. Call Count Settings

On selecting the Edit Call Count Resource, the following screen is presented: -



The count limit is a numerical value (1 to 9999). Click on 'Update' to activate changes

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12. Queue Server Explanation

Queue Limit = Maximum number of calls held in the Queue

Queue Time = Max Amount of Time (in seconds) a caller will wait in the Queue

Call Limit = Maximum amount of calls the server will put through to the called party. (a call centre may have 75 staff but only want 50 staff answering calls at any one time)

If queue limit is set to 1, then one call will be accepted into the queue, every additional call while the first call is still queueing, will get the queue busy message. Calls stay in the queue (i.e. count against Queue Limit) until either they are answered or they timeout/abandon.

Example 1

Queue Limit = 1

Queue Time = 600

Call Limit = 15

The first call will come into the queue and the server will attempt an out dial. Until that caller is answered, or they timeout / abandon no other caller will be able to get into the queue. This will happen until 15 callers are connected. The 16th caller will go to the busy leg of the IVR.

Example 2

Queue Limit = 15

Queue Time = 600

Call Limit = 15

The first call will come into the queue and the server will attempt an out dial. The second, third....fifteenth callers will also be placed in the queue, but these will not be attempting out dials. Until the caller at position one of the queue, is answered or any of the callers in the queue timeout / abandon, any new caller will hear a queue full message.

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