Aspire Advanced Solutions

QuickStart Guide

Revision 1.3

Table of Contents

Scope	**3**
Concepts and Abbreviations	**4**
Step 1 – Optimus Activation	**6**
Step 2 – Main System Default Number	**10**
Step 3 – Optimus Main Devices	**11**
Step 4 – Incoming Calls DNISs	**12**
Step 5 – Agent Workstations	**13**
Step 6 – Users & Agents	**14**
Step 7 – Queues	**15**
Step 8 – Groups	**16**
Step 9 – Routing Rules	**17**
Summary	**18**

Scope

The purpose of this guide is to provide a quick reference for basic configuration for the Optimus Call Center system from Aspire. The guide includes nine basic yet imperative steps for basic system configuration.

Once all the steps are completed, users should have a basic, functional call center including one DNIS, one queue and one agent group. Also, following these steps should provide users with the basic knowledge for system configuration. A complete reference for all Optimus features is available in the Optimus System Manual.

This Optimus System Manual refers to Optimus version 0.20 and no other prior or later versions. For other versions please refer to the correct System Manual.

Clarification: All male-oriented references in this document are intended for both male and female readers and users.

Concepts and Abbreviations

- **Optimus Server**: The PC server where Optimus Call Center is installed, using Microsoft Windows 2000/2003 Server OS software.
- **TAPI**: Telephony API (Application Programming Interface): telephony protocol supplied by Microsoft as part of the Windows OS and used by PBX vendors for application access.
- **TSP / TAPI Server**: TAPI Service Provider: The software developed by the PBX vendor using the TAPI protocol, to enable application access to the PBX. For Optimus, the LGN TSP is installed on the Optimus Server.
- **Optimus Main Device (OMD)**: Optimus uses a smart LG-Nortel extension to handle waiting calls. This extension should be an LDP-30 telephone device, and DSS units are added as needed for call center with more than one PRI (or E1) interfaces.
- **Smart Extension**: An extension of the PBX supporting a smart, digital phone set. A smart extension has many features available through the PBX, which a regular extension does not.
- **Regular Extension**: An extension of the PBX supporting a regular, analog phone set. A regular extension usually supports only simple telephony functions, not unlike a traditional home telephone.
- **DSS**: An extension of a smart telephone set, providing more buttons and allowing the set to handle more calls simultaneously.
- **TN**: A unique, physical identification of an extension in the PBX.
- **CLAN**: Customer LAN. The main local network of the customer.
- **PLAN**: PBX LAN. A network segment where the LGN PBX and the Optimus Server are located. See Optimus Architecture diagram (Appendix A) for more details.
- **PBX**: Private Branch Exchange.
- **IP Address**: TCP/IP network protocol assigns a unique IP (Internet Protocol) address for each computer or device (such as the PBX).
- **IP Port Number**: TCP/IP network protocol uses different port numbers for different types of communications. For example, the HTTP protocol used for web browsing uses TCP/IP port 80, the SMTP protocol for email transfer uses port 25, and so forth.
- **DNIS**: Destination Number Identification Service, provided for each call and designates the number that was dialed in order to reach the call's destination.

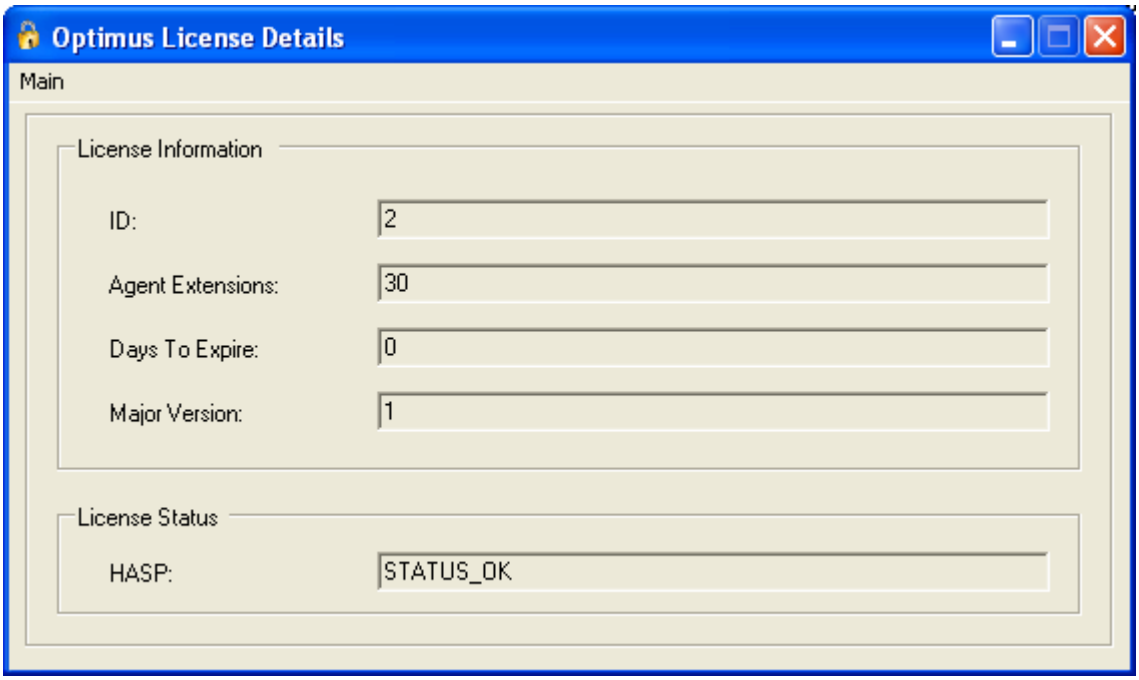
- **CLID / ANI**: Caller ID, provided for each call and identifies the caller's number (unless the number is blocked purposefully).
- **ATTACHDATA**: Any additional data (besides DNIS and CLID) attached to the call. For example: Customer ID as entered by the caller using the phone's buttons.
- **SPIN**: Screen Pop-up Integration. An Aspire product used for tight and closer integration, used mainly for Client/Server software.
- **ODBC**: Open Data Base Connectivity – a MS-Windows standard for database access and connections. Supported by most commercial database software.

Step 1 – Optimus Activation

Once installation is complete, you can activate Optimus using a dongle or an activation code provided by your local dealer.

Dongle Activation Method

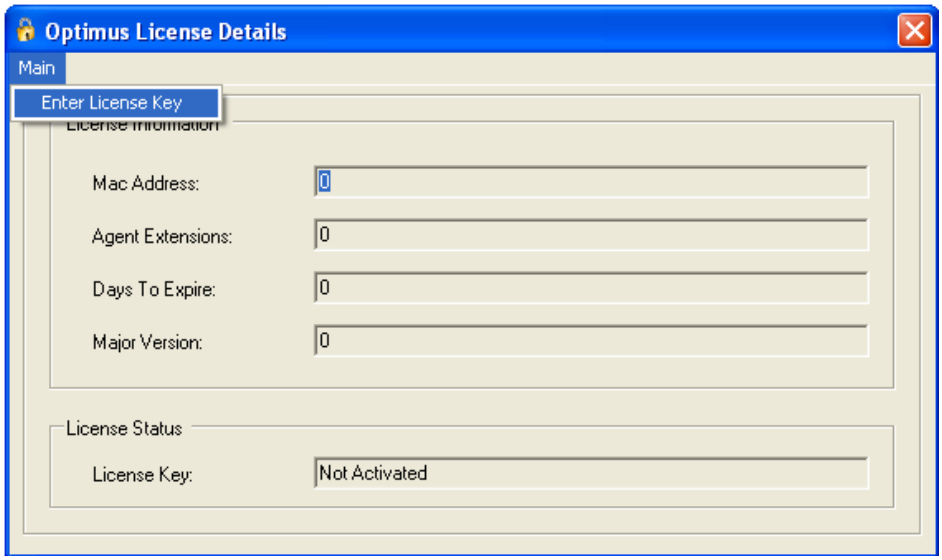
1. When using a Dongle activation method, simply plug the dongle to a USB Host Controller. Open the Optimus License Details application (Start /Programs /Aspire-as /Optimus /Optimus License Details) and check that the license information is correct.



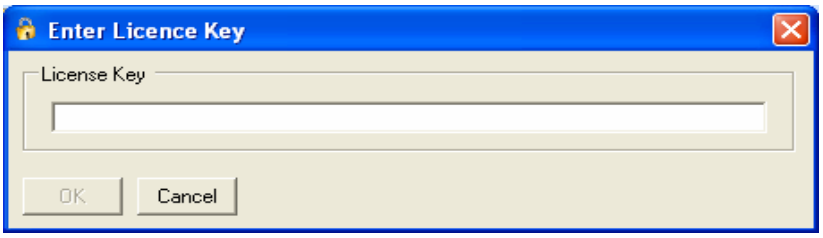
In this scenario, skip to "Optimus Maintenance", Page 6.

Activation Code (based on MAC Address) Activation Method

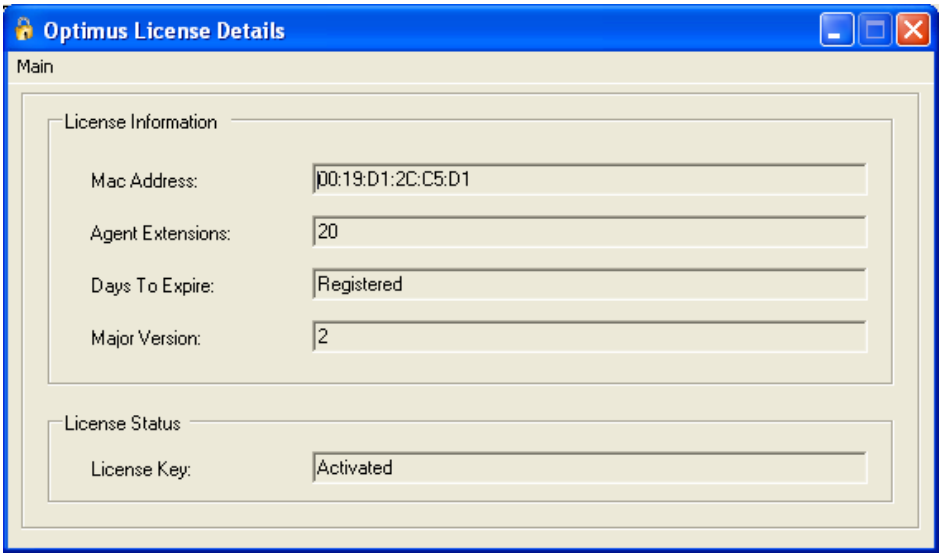
1. When using an activation code, open the Optimus License Details application (Start /Programs /Aspire-as /Optimus /Optimus License Details). From the *Main* menu, choose *Enter License Key*.



2. In the *Enter License Key* screen enter the activation code and press the *Ok* button.

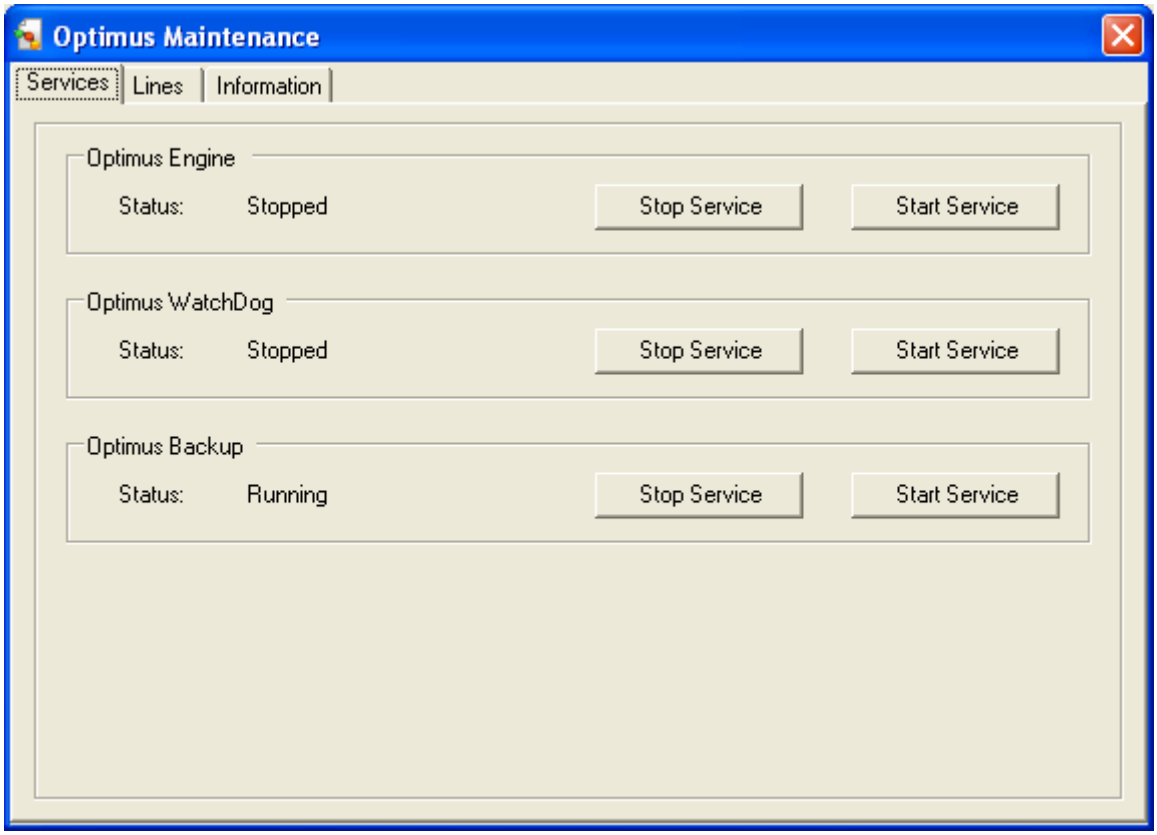


3. Check that the license information is correct.



Optimus Maintenance

When Optimus is activated, start Optimus service (or restart it if it was already started) from the Optimus Maintenance application (Start /Programs /Aspire-as /Optimus /Optimus Maintenance).



Starting Optimus service

Configuring Optimus

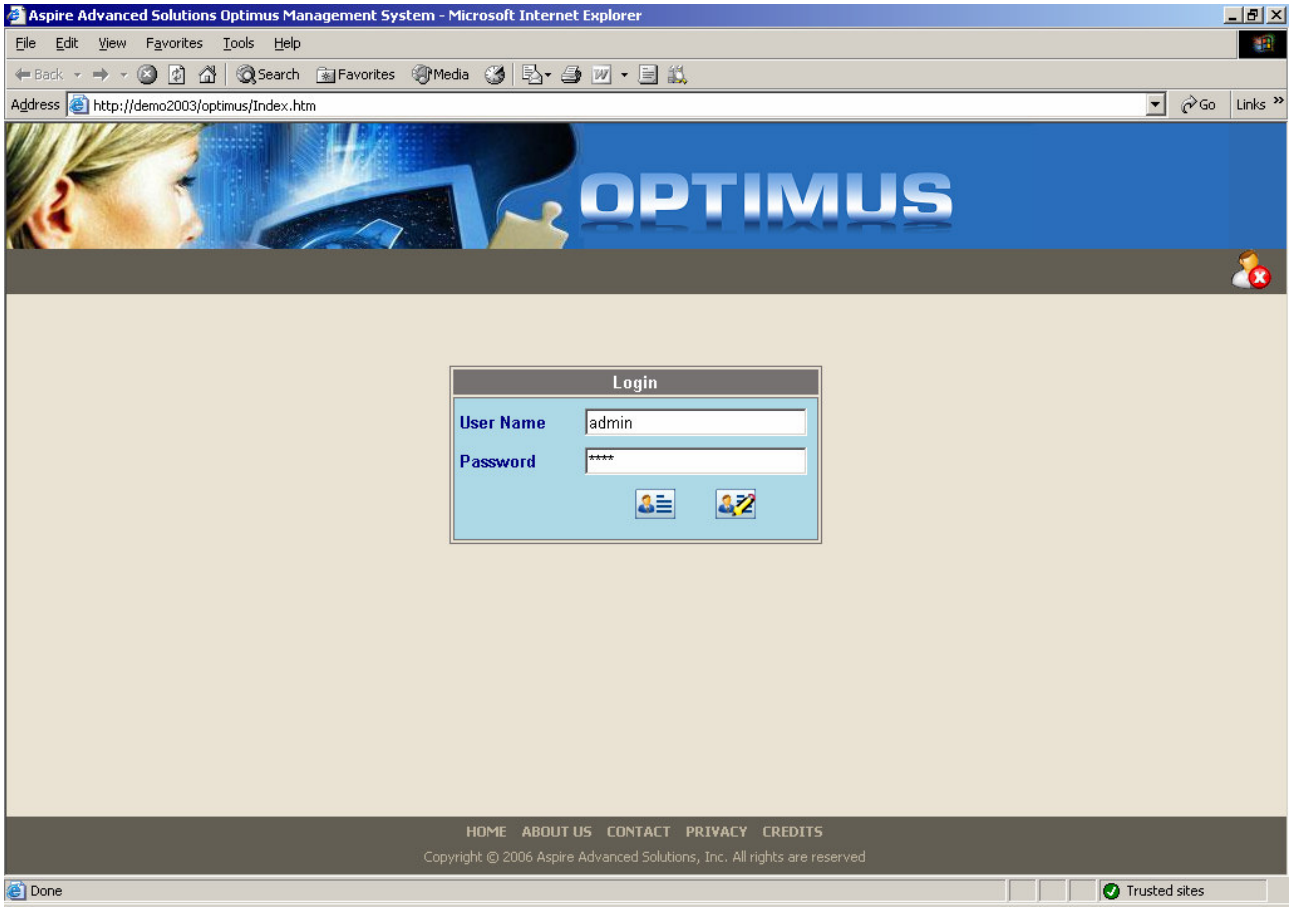
The following steps are done in the Optimus Management System which is accessible via Microsoft Internet Explorer from any computer connected to the Optimus server.

Open Microsoft Internet Explorer and type the following URL in the address bar:

http://[OPTIMUS_SERVER_MACHINE_NAME]/Optimus/index.htm

where [OPTIMUS_SERVER_MACHINE_NAME] is the machine name or IP address where the Optimus is installed.

In the login screen the username is *admin* and the password is *1234*. This is the default user installed with the Optimus – Do not Changed it.



Step 2 – Main System Default Number

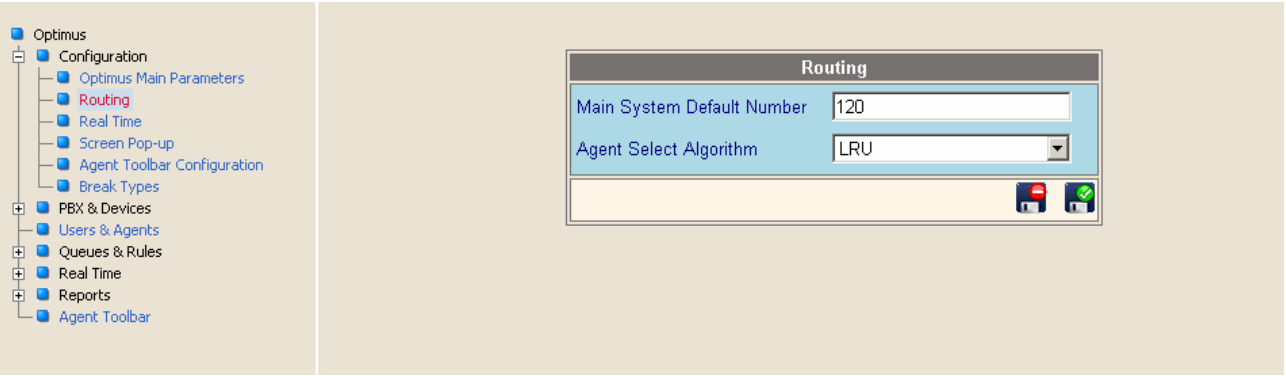
The Main System Default Number is where calls will be routed in several cases:

- No agents are logged into the system
- Faulty routing rules cause infinite loops
- Other cases where the system does not have information as to where the call should be routed.

Aspire recommends setting this number to the extension number of the Call Center's shift manager – who would be able to understand why the call was routed to them and act accordingly to remedy the situation. It is highly recommended that this extension is not used as an agent's extension.

To set the default transfer number, go to *Configuration/ Routing* and set the *Main System Default Number*.

Click on the *Save* icon when finished.



Step 2

Step 3 – Optimus Main Devices

Optimus relies on a single smart PBX station (per PRI connection) to handle waiting calls.

To add new device, go to *PBX & Devices/ Optimus Main Devices*.

The fields are:

Extension TN

Choose an extension from the available list (DKT Station).

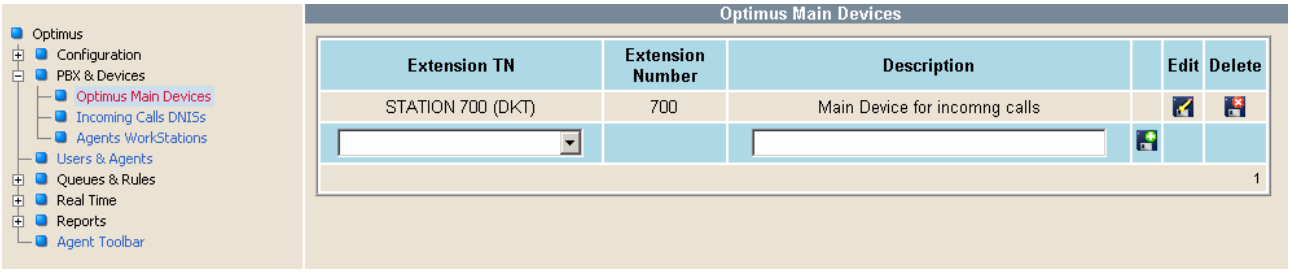
Extension Number

Type the extension number - this is the station's DNIS (Dialed Number Identification Service).

Description

Type a free text which describes the extension.

Click on the *Save* icon when finished.



Step 3

Step 4 – Incoming Calls DNISs

Optimus supports an unlimited number of incoming numbers from which calls can be handled (DNIS).

One station can receive calls from several DNISs. Suppose you have 2 DNISs: the first is XXXX101 and the second is XXXX102. Inside the PBX you can configure a station to receive both DNISs calls. Therefore you should add both 101 and 102 as a DNIS.

These numbers (101 & 102) allows you later to set a different Optimus queue for each DNIS.

You can configure incoming calls to 101 to go to Queue Sales and 102 to go to Queue Support.

To add an Incoming Calls DNIS, go to *PBX & Devices/ Incoming Calls DNISs*.

The fields are:

Dialed Number

Type the extension number - this is the DNIS (Dialed Number Identification Service) received for this extension

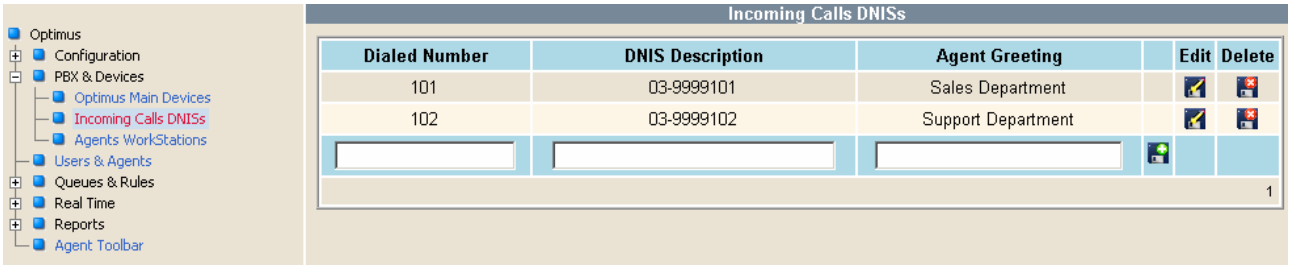
DNIS Description

Type a free text which describes the extension.

Agent Greeting

Type a free text which will be displayed in the pop up screen.

Click on the *Save* icon when finished.



Step 4

Step 5 – Agent Workstations

An extension is a combination of a phone set and a computer where an agent can log in to Optimus and receive ACD calls. Optimus supports agent roaming to all extensions connected to your LG PBX.

To add an extension, go to *PBX & Devices/ Agent WorkStations*.

The fields are:

Extension TN

Choose an extension from the available list.

Extension Number

Type the extension number - this is the station's DNIS (Dialed Number Identification Service).

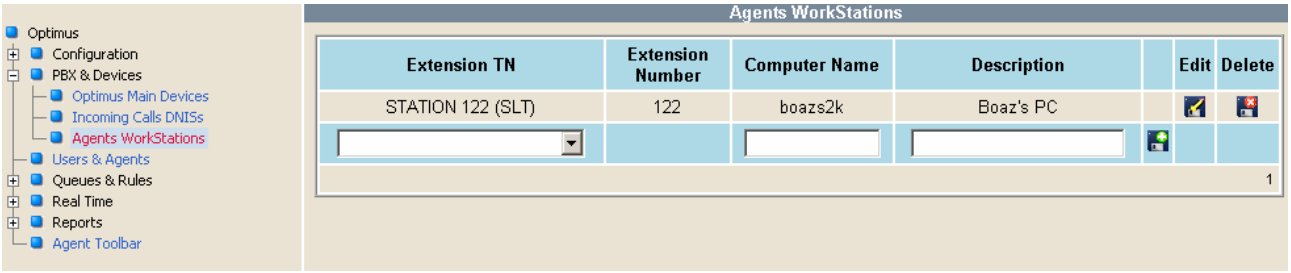
Computer Name

The host name (or IP address in case you use fixed addresses in your network) of the computer being used in this work station

Description

Type a free text which describes the work station.

Click on the *Save* icon when finished.



Step 5

Step 6 – Users & Agents

Optimus arrives with one pre-configured *Administrator* type user. In order for calls to be handled by agents, at least one user must be added of *Agent* type user.

To add a new user, go to *Users & Agents* and click the *Add* icon.

The fields are:

Username

A username is unique throughout the system and is up to 10 characters. Mandatory field.

Password

Up to 10 characters. Mandatory field.

User Type

Available user types are Administrator, Supervisor and Agent. Mandatory field.

Given Name

The first name of the user.

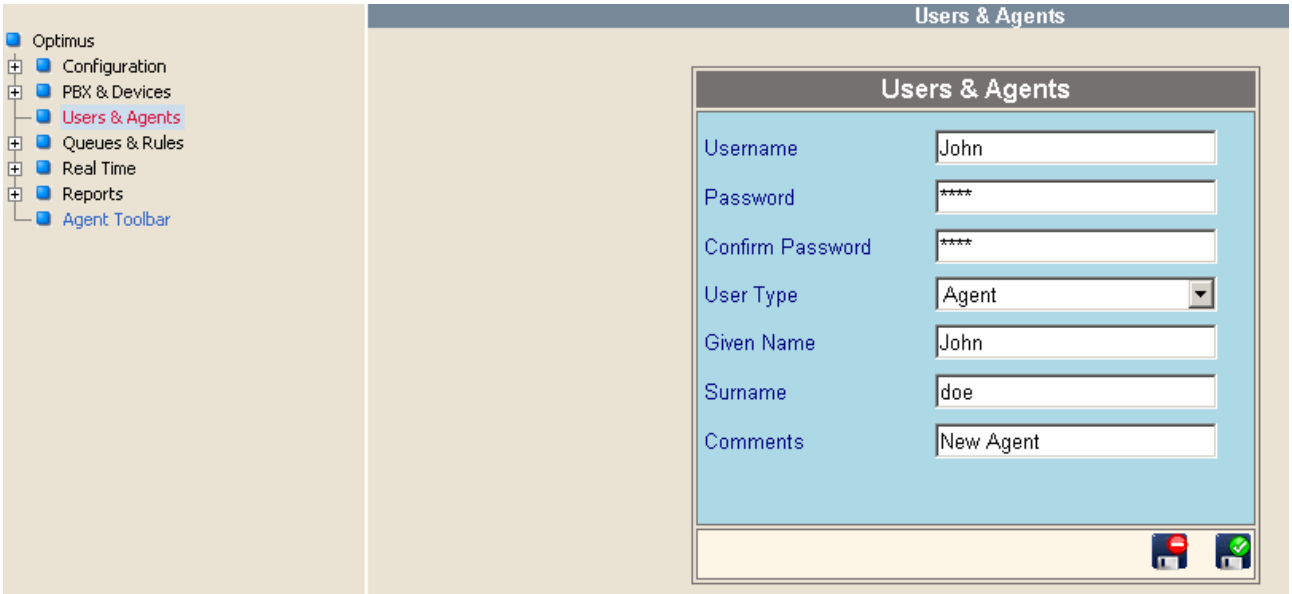
Surname

The surname of the user.

Comments

Free text to describe the user.

Click on the *Save* icon when finished.



Step 6

Step 7 – Queues

A queue is a logical object in the Optimus system where a call is while there is no available agent to answer it. For example: Sales queue or Help Desk queue.

To add a new queue, go to *Queues & Rules/ Queues* and click on the *Add* icon.

The fields are:

Queue Name

The name of the queue.

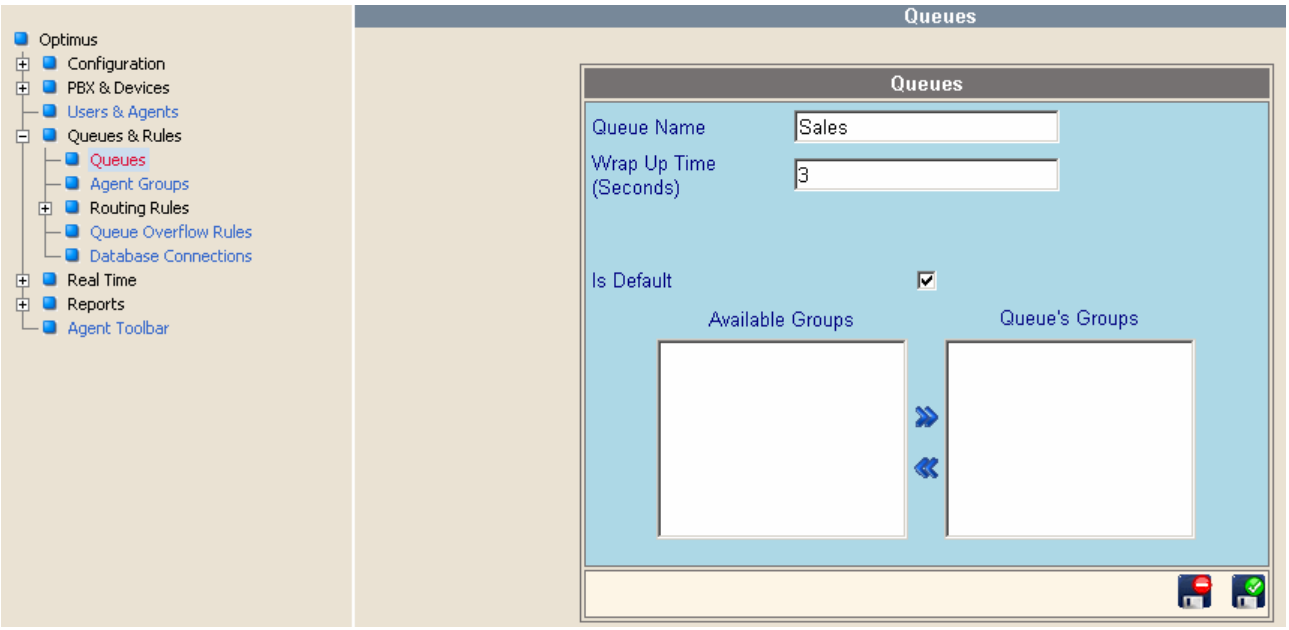
Wrap Up Time (Seconds)

When an agent finishes an ACD call, Wrap up Time is the number of seconds to wait before transferring another ACD call to this agent.

Is Default

If this queue is the default queue of the system or not (Check Box). By default, if only one queue is defined then it is the default queue.

Click on the *Save* icon when finished.



Step 7

Step 8 – Groups

A Group contains one or more queues. An agent is assigned to one or more groups, which means that he can answer a call which is waiting in any of the queues in the groups he is assigned to.

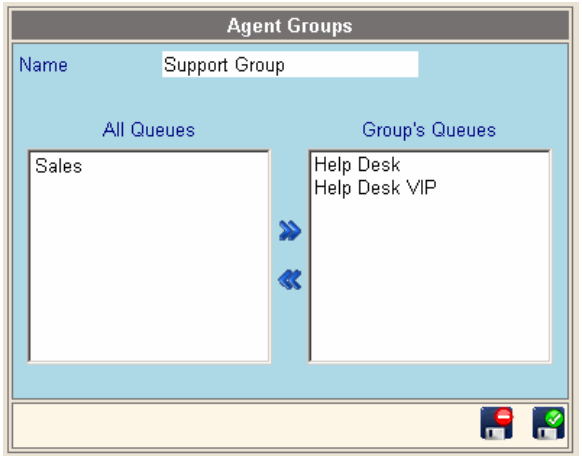
In this step do the following:

1. Add a group and Attribute the queue you added in step 7 to this group.
2. Go back to the main Group screen and click on the Users icon and Assign the users you created on step 6 to this group. Any user added to this group can answer calls routed to any of the queues assigned to this group.

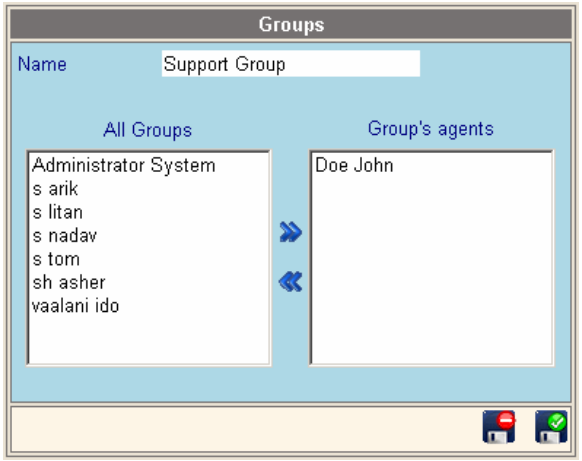
To add a new group, go to *Queues & Rules/ Agent Groups*, and click on the *Add* icon.

Group Name: The name of the group.

Click on the *Save* icon when finished.



Step 8.1



Step 8.2

Step 9 – Routing Rules

A routing rule determines to which queue the call will be routed to. A routing rule can be based on one of the following combinations:

1. Customer's Database rules
2. DNIS & CLID
3. CLID
4. DNIS

In this step we will configure a routing rule based on a DNIS.

To add a new routing rule, go to *Queues & Rules/ Routing Rules/ Route by DNIS Rules*.

The fields are:

Incoming Call DNIS

The DNIS of this rule. Select a DNIS configured in step 4.

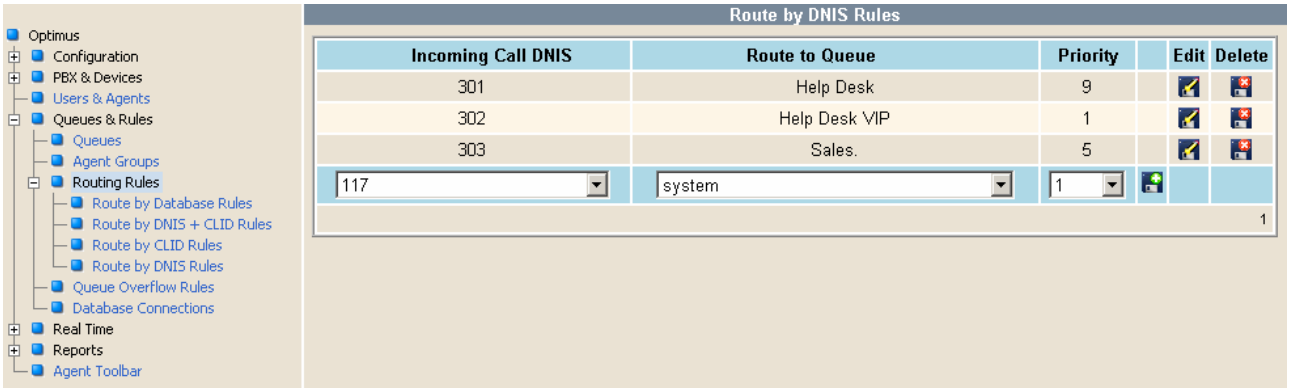
Route to Queue

The queue that a call to this DNIS will be routed to. Select a queue configured in step 7.

Route with Priority

The priority given to a call in this queue. The highest priority is 1.

Click on the *Save* icon when finished.



Step 9

Summary

If you followed all the steps than Optimus is now ready to receive ACD calls and route it to agents. Let's review all the steps:

1. Activate Optimus.
2. Define the default transfer number. It is used only on extreme situations.
3. Add an Optimus Main Device. This is the station that physically holds all the calls.
4. Add an Incoming Call DNIS (Dialed Number Identification Service).
5. Add Agents Workstations. Workstation is a combination of a phone set and a computer where an agent can log in to Optimus and receive ACD calls.
6. Add a user of type Agent.
7. Add a queue to receive the incoming ACD calls.
8. Add a group and assign the queue to this group.
9. Add a routing rule to route a call to the DNIS added in step 4 to a queue added in step 7.

In order to complete the test, log in with the user added in step 6 in the extension added in step 5. Open the agent toolbar (go to *Agent*, *Toolbar*), click the *Login* button and than click the *Ready* button. Dial a call to the DNIS added in step 4 (an outside call, not a direct inside call). Optimus will then answer the call and place it on the queue added in step 7. Since the agent is on *Ready* status, Optimus will route the call to this agent. If you dial another call to this DNIS while the agent is still on the call, the new call will be placed on hold in the queue, waiting for the agent to finish his current call before transferring the new call to the agent.