MITEL NETWORKS

3300 Integrated Communications Platform

ACD 2000 AGENT GUIDE FOR THE MITEL NETWORKS™ 5010 IP PHONE

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General Information About this Guide

This guide describes operation of the Automatic Call Distribution (ACD) 2000 Feature Package on a Mitel Networks 5010 IP Phone. 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 Mitel Networks 5010 IP Phone (some of which will work in conjunction with ACD), refer to the set guide.

IMPORTANT NOTE FOR HEADSET USERS: Mitel Networks Headsets with Feature Control Switch (PN 9132-800-500-NA/9132-800-501-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 Feature Package is offered by the Mitel Networks 3300 Integrated Communications Platform (ICP). 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.

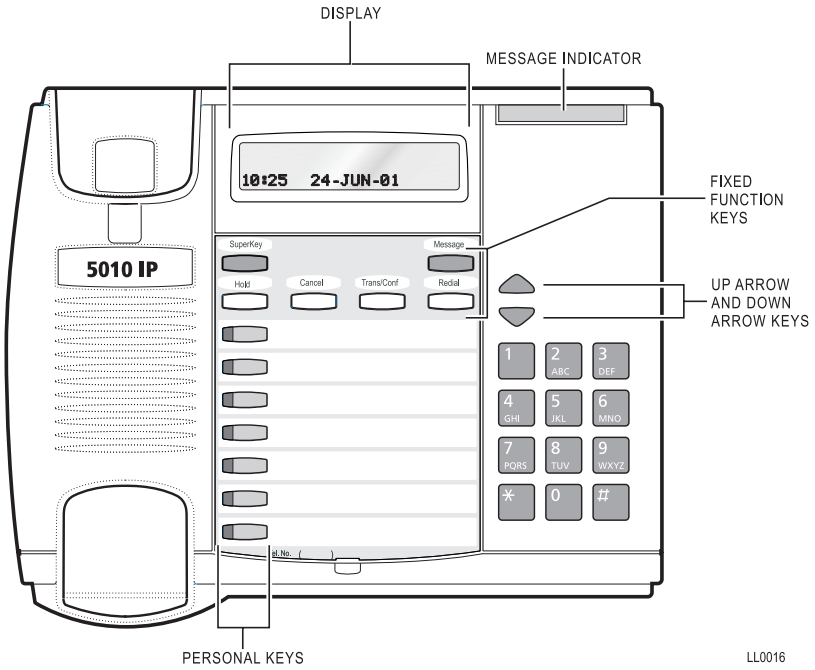
Typical examples of ACD applications include:

- 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 may be 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 3300 ICP 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 5010 IP Phone



Personal Keys

At the bottom of your 5010 IP Phone is a row of Personal Keys. The bottom Personal Key is your Prime Line, the telephone line that you will usually use. Your extension number is the number of your Prime Line.

Other Personal Keys can be programmed by you as Speed Call Keys, or by your System Administrator as Line Select or Feature keys.

Line Select Keys/Line Appearances

Your 5010 IP Phone can accommodate up to seven lines, including your Prime Line (your listed number). Your Prime Line always appears at bottom Personal Key. Other Personal Keys can be programmed as Line Select Keys. Line appearances on your set may be used as separate telephone lines or 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 for your set.

Line Status Indicators

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

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 slow on, fast off cycle on your set's Line appearance

Feature Keys

A Personal Key can also be programmed as a Feature Key by your System Administrator 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.

Main Display

The main display, located at the top of your 5010 IP Phone shows the ***SuperKey*** instructions. The Redial number, the name of the feature currently active, messaging information, and telephone system error messages can also be shown.

When your telephone is idle, the current date and time of day are displayed continuously. But 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

When you press the ***SuperKey*** Function Key, the main display changes. In particular, prompts on the screen change. Prompts appear only when they can be used and if they are available to you.

To exit a ***SuperKey*** session, press the ***SuperKey*** once more.

Function Keys

The Function Keys are located just below the main display. A number of the 5010 IP Phone features are accessed by using the Function Keys on your telephone.

1. **Message** Key: for sending and responding to messages.
2. **Hold** Key (red key): for placing calls on hold.
3. ***SuperKey*** (blue key): for programming Personal Keys as Speed Call Keys, accessing most set features, and displaying set information.
4. **Trans/Conf** Key: for transferring calls and setting up conference calls.
5. **Redial** Key: for redialling the last dialed number.
6. ↑ and ↓ Keys: for changing the volume of the handset receiver, the volume and pitch of the ringer, and adjusting the contrast of the main display.
7. **Cancel** Key: for canceling call features in progress.

Feature Access Codes

The following telephone features can be activated or disabled by Feature Access codes, when no Feature Keys are programmed for this purpose:

- Auto Answer
- Do Not Disturb
- Make Busy
- Headset Operation
- Login
- Logout

Contact your System Administrator for these and other Feature Access codes available on your telephone system, or to have these features programmed to be activated by a Feature Key. 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, and your display may not appear exactly as in the illustrations in this guide. You may also have additional functionality not described in this guide. 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 Agent Groups with two or more Agents in each Group allows calls to be handled on a Group basis rather than on an individual basis. An Agent can have multiple Agent ID's, but Agents can only have one Agent ID per group, and can only log in one Agent ID per telephone.

Agent Groups are assigned a unique 3-digit reporting 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 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 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.

Queue Threshold Alert is a method of alerting you as to the status of your ACD Group (Queue). This section describes the conditions under which an alert would occur and describes how you will be notified when there is a backlog of long-waiting calls.

Displaying Queue Status describes the procedure for displaying the current workload conditions of your ACD Group (Queue).

Logging In

Automatic Call Distribution (ACD) 2000 calls are directed to Logged In Agents only. ACD calls are not directed to a telephone 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 a 1- to 7-digit Identification (I.D.) number to log in with, you can be called by this I.D. number, as well as by the telephone extension number 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 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. You can also log in by using an alternative Feature Access code not explained in this guide.

NOTE: If the I.D. is in use by another Agent, or the I.D. is invalid, the Log-In procedure is terminated.

If an Agent Log-In code is dialed, but no I.D. is entered within 60 seconds, the Log-In procedure is not activated and your set is treated as a Logged Out set.

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

When You Are Ready to Log In

To log in, perform the following tasks:

1. Press the **Agent Log-in** Feature Key
   or
   enter the Agent Log-In feature access code.
2. Enter your Agent I.D. code on the keypad.
3. Press #. Your set briefly displays LOGIN.

Displaying Agent Log-In Information

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

1. Press the ***SuperKey*** Function Key,
2. Press # until PERSONAL KEYS appears on the display.
3. Press * and the Agent Identification (I.D.) number currently logged in will be displayed for 3 seconds.
4. The prompt SELECT A KEY appears. You may select another Line Select Key for similar information if the set has more than one line appearance.

   If you press your Prime Line Key, your display shows your Agent I.D. number and your name (if programmed).
5. To exit, press the ***SuperKey*** Function Key.

Logging Out

Logging out returns the set to Make Busy and it no longer receives Automatic Call Distribution (ACD) calls, since ACD calls are directed to Logged-In telephones 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. Press the **Agent Log-out** Feature Key
   or
   enter the Agent Log-out feature access code.
2. Press the **Cancel** Function Key.

Answering Calls

Answering ACD calls is not unlike answering regular calls on the 5010 IP Phone. 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.

To Activate Auto Answer

To activate the Auto Answer feature:

1. Press the **Auto Answer** Feature Key. The indicator beside the Auto Answer key turns on.

To Deactivate Auto Answer

To deactivate the Auto Answer feature:

1. Press the **Auto Answer** Feature Key. The indicator beside the Auto Answer key 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 Networks Headsets with Feature Control Switch (PN 9132-800-500-NA/ 9132-800-501-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 press the **Headset** Feature Key.
5. 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 **Cancel** Function Key.

To Install a Headset with Feature Control Switch

IMPORTANT NOTE: Mitel Networks Headsets with Feature Control Switch (PN 9132-800-500-NA/9132-800-501-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 **Cancel** Function Key
  -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 compete 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 do not activate a Work Timer. 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, as shown below:

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.

To cancel the Work Timer, press the **Cancel** Function Key. Your set displays the normal screen and is now available for the next ACD 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 Make Busy state until an Agent Log-In is performed.

Your 5010 IP Phone operates as a normal telephone except for ACD use during the Make Busy state. You can activate this feature between calls or 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:

- Press the **Make Busy** Feature Key. Your set displays MAKE BUSY until it is deactivated.

How to Remove Make Busy

To deactivate the Make Busy feature:

- Press the **Make Busy** Feature Key. Make Busy is removed from your set, and the display returns to idle.

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.

If your set is programmed with a Generic Group **Queue Status** Feature Key, it can provide a visual indication of the current workload conditions of the Automatic Call Distribution (ACD) Group into which you are logged. 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 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).

Displaying Queue Status

Agents may access the following queue-status information about their 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.

When You Need To Know Your Group's Queue Status

- If your set is programmed with a Generic Group **Queue Status** Feature Key, press the key.

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.

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

Notes