WARNING! Toll fraud is committed when individuals unlawfully gain access to customer telecommunication systems. This is a criminal offense. Currently, we do not know of any telecommunications system that is immune to this type of criminal activity. AltiGen Communications, Inc. will not accept liability for any damages, including long distance charges, which result from unauthorized and/or unlawful use. Although AltiGen Communications, Inc. has designed security features into its products, it is your sole responsibility to use the security features and to establish security practices within your company, including training, security awareness, and call auditing.

NOTICE: While every effort has been made to ensure accuracy, AltiGen Communications, Inc., will not be liable for technical or editorial errors or omissions contained within the documentation. The information contained in this documentation is subject to change without notice.

This documentation may be used only in accordance with the terms of the AltiGen Communications, Inc., License Agreement.

MaxACD, MaxACD Administrator, MaxAgent, MaxSupervisor, MaxReports, VRManager, and Enterprise Manager are trademarks or registered trademarks of AltiGen Communications, Inc. All other brand names mentioned are trademarks or registered trademarks of their respective manufacturers.

AltiGen's products are protected under one or more of the following U.S. patents, with other U.S. patents pending: 6532230; 6192344; 6493439; 6909780; 6738465; 6754202; 6766006; 6928078; 6909709; 6956848; 7058047; 7013007; 7027578; 7280649; 7308092.
Contents

Related Documentation .................................................. 1

Chapter 1: System Requirements ................................. 3
Components of MaxACD 7.0 ........................................... 3
Requirements ............................................................. 3
MaxACD Licenses ......................................................... 4

Chapter 2: Getting Around the Administrator Portal ........ 5
Logging In and Out ....................................................... 5
The Menu Bar ............................................................. 6
Managing License Assignments .................................... 8
Changing the Admin User Password .............................. 9
Stopping and Starting the MaxACD Service ................. 9

Chapter 3: System Configuration ................................. 11
Viewing Server Information ......................................... 12
  Defining the Main Phone Number ................................ 12
  Configuring Exchange Integration ............................... 13
  Configuring Message Notification ............................ 13
Configuring Reports ..................................................... 14
  Adding Log Services ............................................... 14
  Configuring Database Options ................................ 15
Defining Account Codes ............................................... 15
Defining Logout Reason Codes .................................... 16
Configuring Call Recording ......................................... 17
  Description of the Recorded File Name ....................... 17
  Configuring Recording ............................................ 17
Configuring SNMP Support .......................................... 18
  Configuring SNMP Support in MaxACD ..................... 19
About SNMP Management Consoles .......................... 19
List of SNMP Traps ..................................................... 20
SNMP Trap OID Numbers ........................................... 21
Configuring Lync/Skype Presence Mapping ................... 22

Chapter 4: Web Chat Configuration ............................ 25

Chapter 5: Configuring User Options ............................ 27
Configuring User Details ............................................. 27
  Assigning Client Licenses to Users ....................... 28
  Configuring User Voice and Chat Attributes ............ 29
  Configuring User Account Code Options .................. 30
Adding Active Directory Users into MaxACD ................ 31
Assigning Users to Workgroups .................................. 31
Configuring Personal Answer Announcements .............. 33
Granting Monitor Privileges to Users ......................... 34
  Set Up Agent Monitoring ...................................... 35
Chapter 6: Configuring Workgroups

Chapter 7: Multilingual Configuration
Directory Structure for Language Phrase Packages .................. 66
The Language Packages Configuration Tool .......................... 67
Initial Language Installation ........................................... 67
Uninstalling Language Files .......................................... 67
Which Language Will Be Used? ....................................... 67

Chapter 8: Configuring Routing ............................. 69
Configuring Inbound Routing ........................................ 69
   Creating URI Routing Rules ................................. 70
Configuring Caller ID Routing ...................................... 72
   How MaxACD Routes Incoming Calls ..................... 72
   The Caller ID Routing Tab .................................. 73
   Configuring Caller ID Routing .................. 73
Configuring Virtual Extensions ................................. 73

Chapter 9: Configuring IVR .............................. 75
Planning Is Essential .............................................. 75
   Example: IVR Planning ..................................... 76
IVR Terminology .................................................. 76
Adding New IVR Trees ........................................... 77
Configuring IVR Menu Items ........................................ 78
   Action Descriptions ........................................ 79
   Collecting Digits ........................................... 80
   Making IVR Assignments .................................. 81
Enabling Multilingual for IVR Systems .................... 81
Phrase Management - Voice ..................................... 82
   Using Professionally Recorded Phrases ..................... 83
   Recording Custom Phrases .................................. 83
   Music On Hold ............................................. 83
Uploading Voice and Chat Phrases .............................. 83
HTML Web Chat / Agent Announcement Stylesheets ........... 85

Chapter 10: Configuring Business Hours and Holidays ...... 87
Defining Business Hours ........................................... 87
   Modifying the Default Business Hours Profile .............. 88
Creating New Business Hours Profiles ....................... 88
Deleting Business Hours Profiles ............................. 89
Defining Business Holidays ...................................... 89
   Modifying the Default Holiday Profiles (System or System.chat) .... 90
Adding New Holiday Profiles .................................. 91
Copying Holidays from One Holiday Profile to Another .... 91
   Creating A Similar Profile for Voice or Chat ............... 92
   Renaming Holiday Profiles ............................... 92
   Updating the Dates of Annual Holidays .................. 92

Chapter 11: Configuring Redundancy .......................... 93
Enabling Redundancy ............................................. 93
Manually Switch to the Standby Server ....................... 94
Chapter 12: Configuring Admin Users

Adding Administrators and Workgroup Supervisors
Changing Administrator Privileges

Appendix A: Tools and Applications

Backup and Restore Utility
Backup Configuration
Configuring a Weekly Backup Schedule
Performing a One-Time Backup
Restoring Backed up Files
Start & Stop All MaxACD Services
Trace Collector
CWSDB Connection Tool

Appendix B: Network Ports

Appendix C: Technical Support
About This Manual

This manual shows administrators how to configure AltiGen’s MaxACD using the MaxACD Administrator portal.

Related Documentation

The full documentation set for MaxACD Release 7.0 can be found on AltiGen Communication’s MaxACD website, at http://www.altigen.com/support/maxacd-manuals/. That site will have the latest version of each document.

Deployment and upgrade guides:

- MaxACD 7 All-in-One Deployment Guide
- MaxACD 7 Web Chat Deployment Guide
- MaxACD 7 Upgrade Guide
- MaxACD 7 Conversion to Redundant System

Client manuals:

- New Features Guide
- MaxAgent Manual
- MaxSupervisor Manual
- Advanced Call Router Manual
- MaxInsight Manual
- MaxReports Manual
- CDR Manual
- VR Manager Manual

Information contained in this document is believed to be accurate and reliable at the time of printing. However, due to ongoing product improvements and revisions, AltiGen cannot guarantee accuracy of printed material after the date published, nor can it accept responsibility for errors or omissions.
System Requirements

This section describes the following:

- *Components of MaxACD 7.0* on page 3
- *MaxACD Licenses* on page 4

For installation and deployment instructions, refer to the *MaxACD 7.0 All-in-One Deployment Guide*.

**Components of MaxACD 7.0**

- **MaxACD AS** – The MaxACD Application server, which provides IVR and MaxACD feature services
- **MaxACD Proxy** – A UCMA-based application service residing in a Trusted Application Pool
- **CWS (Configuration Web Service)** – A web program, the *Administrator Portal*, is used by administrators to configure system, feature, and user options
- **CWS DB** – A configuration database hosted by a MS SQL server or SQL Server Express; make sure that your browser has JavaScript enabled, so that you can see information in all tabs clearly

**Important:** MaxACD is a component of Microsoft UCMA server roles for Lync and Skype for Business. It is important that you check with AltiGen before applying a Cumulative Update, to make sure that the CU is supported by AltiGen. Contact your AltiGen representative for a list of approved CU updates.

**Requirements**

For the All-in-One configuration, the server must meet the following minimum requirements:

- Quad-core CPU
- 4GB memory
- 100GB available hard drive disk space
- An SSD is required

For component and client requirements, please refer to the *MaxACD 7.0 All-in-One Deployment Guide*. 
## MaxACD Licenses

The following table lists the licenses available for MaxACD.

<table>
<thead>
<tr>
<th>Licences for MaxACD</th>
<th>Description</th>
</tr>
</thead>
</table>
| MaxACD Server Licenses (Bundle 9Lxxx...) | • MaxACD License  
• MaxReports License  
• VRManager License  
• Multi-Lingual License  
• Advanced Call Router License |
| MaxACD Chat Server Upgrade License (ACD-CHATSVRUPG) | Only for customers upgrading from MaxACD Release 6.5.x |
| MaxAgent Licenses (Bundle 9Axxxx) |  |
| MaxSupervisor Licenses (Bundle 9Bxxxx) |  |
| MaxAgent Voice Media Seat Upgrade License (ACD-AGENTSEAT-V) | Only for customers upgrading from MaxACD Release 6.5.x |
| MaxAgent Chat Media Seat Upgrade License (ACD-AGSEATUPG-C) | Only for customers upgrading from MaxACD Release 6.5.x |
| MaxAgent Voice and Chat Media Seat License (ACD-AGENTSEAT-VC) | For new MaxACD customers; provides both voice and chat media |
| MaxSupervisor Seat License (ACD-SUPERVISOR) |  |
| Redundancy License (ACD-REDUNDANCY) |  |
| Recording Seat License (ACD-RECSEAT) |  |
| CRM Integration Seat License (Salesforce) (ACD-CRM-SF) |  |
| Client SDK Seat License (ACD-CLTSDK) |  |

If you are upgrading from MaxACD Release 6.5.8, refer to the *MaxACD 7.0 Upgrade Guide* for a list of upgrade licenses.
Getting Around the Administrator Portal

This section assumes that you have followed the instructions in the various MaxACD deployment guides to install the product. It describes the following:

• Logging In and Out on page 5
• The Menu Bar on page 6
• Managing License Assignments on page 8
• Changing the Admin User Password on page 9
• Stopping and Starting the MaxACD Service on page 9

Logging In and Out

To configure your system, you must first log into the configuration portal. To log into the portal,

1. Open a browser window and navigate to the IP address or FQDN where you installed the Administrator Portal. For example:

   http://192.168.1.110/CWS/

2. Enter your Windows account UPN name and password.

   The first time you log in, use the default user name “admin” and the default password, 22222.

   If the login attempt fails, you will also need to enter the domain and user ID in the User Name field.

   Important: To ensure system security, change the system password as soon as possible.

To log out, click the Logout button on the Menu bar.
After you log into the Administrator Portal, you’ll see a window similar to the following figure.

**Figure 1. A sample workgroup tab**

The configuration portal includes a menu bar at the top. On most tabs, you will click an object (a user, a workgroup, a routing rule, and so on) from a list on the left, and adjust its parameters on the right.

**The Menu Bar**

The Menu bar is at the top of the window. It contains menus for the main aspects of the system.

**Figure 2. The Administrator Portal Menu bar**

- **Admin tabs** – Where you configure system URI information, set up Caller ID routing, manage Administrator accounts, configure the Web chat parameters, and create virtual extensions.

**Figure 3. The tabs on the Admin menu**
• **System tabs** – Where you configure the general aspects of MaxACD, including account codes, multilingual settings, and SNMP. These tasks are discussed in System Configuration on page 11.

![Figure 4. The tabs on the System menu](image1)

• **User tabs** – Where you configure user accounts. Here, you can assign users to workgroups and grant monitoring privileges. These tasks are discussed in Configuring User Options on page 27.

![Figure 5. The tabs on the User menu](image2)

• **IVR tabs** – Where you configure IVR settings, manage phrases, and set language options. These tasks are discussed in Configuring IVR on page 75.

![Figure 6. The tabs on the IVR menu](image3)

• **Workgroup tab** – Where you configure Workgroups, including workgroup type (voice or chat), group membership, business hours, skill-based routing, session handling, and queuing options. These tasks are discussed in Configuring Workgroups on page 37.

![Figure 7. The tabs on the Workgroup menu](image4)

• **Work Hours tab** – These tabs are where you configure your business’s daily work hours and set up holiday profiles with routing rules. These tasks are discussed in Configuring Business Hours and Holidays on page 87.

![Figure 8. The tabs on the Work Hours menu](image5)

• **License tab** – Where you can view the MaxACD licenses in use and the total license count for each application; see Managing License Assignments on page 8.

• **Settings tab** – Where you can change the password for the Administrator account. Here, you can also retrieve the password for the CWS database.

• **Logout button** – Logs you out of MaxACD.

In the upper right corner, the **About** button provides the version and the build number of MaxACD, and the **Help** button provides information about the current tab.
Managing License Assignments

To accommodate the new Web Chat feature, the licenses in MaxACD 7.0 have been modified. The Agent license in previous releases of MaxACD is now the Agent Basic license. It includes a Voice Media license. The License tab shows you the license key, in addition to the licenses in use and the total license count for each application.

**Note:** You can manage user seat licenses either on the License tab or in the User > General tab. To quickly view the users who have been assigned a specific seat license, open the License tab and select the license in the list. The users who have been assigned to that license will appear on the right.

1. Select the seat license and click Edit.}

Figure 9. The License tab

You can assign seat licenses to users from this tab.

Figure 10. Select the users for this license
2. On the next page, select the users for this license (and clear any who will not be using it).
   • You can use **Ctrl-Click** to select multiple users.
   • You can check the checkbox in the heading to select all users; clear that checkbox to clear all selections.
   • If you have assigned more seat licenses than you currently have available, you will see a red asterisk beside those users whose licenses were temporarily disabled due to this disparity.

Considerations:
• When you select the Assign Agent Basic License option, you must also select one of the media options. If you do not assign a media option, MaxACD will remind you to do so.
• If you click **Edit** and change license assignments, the system will validate your selections when you click **Ok**.
• If you remove a media license (either Chat or Voice) from an agent, the system will automatically remove that agent from the corresponding workgroups. For example, if you remove a Chat media license from an agent, the system will automatically remove that agent from all chat workgroups.
• If you switch your license scheme to or from subscription mode, you will need to reboot MaxACD system before you will see the updates in the License tab.

To register licenses, refer to the steps in the *MaxACD 7.0 All-in-One Deployment Guide*.

### Changing the Admin User Password

To change the password for the Admin user, log into the *Administrator Portal*. On the Menu bar, click **Settings**. Enter your current password, a new password, and then confirm the new password.

On this tab, you can also retrieve the password for the database (CWSDB). Click **Show Password** to see the password.

### Stopping and Starting the MaxACD Service

If you need to shut down or restart the service, go to the MaxACD server, open Windows, and then click **Start > All Programs > MaxACD 7.0 > Service Utility**.

This utility lets you stop the MaxACD system services, including the *Administrator Portal* application. When you log back into the *Administrator Portal*, the switching services are reactivated. You can stop MaxACD services only while you are logged into the MaxACD computer.
System Configuration

The System menu offers nine tabs.

Each tab offers a set of options:

- The Server tab is where you can review server details, set the main system phone number, configure integration with Exchange, and set global message notification rules. Refer to the following topics:
  - Viewing Server Information on page 12
  - Configuring Exchange Integration on page 13
  - Configuring Message Notification on page 13

- The Reports tab is where you can add log services (including the external logger service) and specify database retention and archival options; see Configuring Reports on page 14.

- The Account Code tab is where you establish accounting codes, to assign calls to codes for billing purposes. See Defining Account Codes on page 15.

- The Logout Reason Code tab is where you set up reason codes, which agents select to indicate why they are logging out of a workgroup; see Defining Logout Reason Codes on page 16.

- The Call Recording tab is where you enable or disable centralized recording and specify the FTP location of the recording repository. See Configuring Call Recording on page 17.

- The Multi-Lingual tab is where you can edit the name of the languages in your system. See About Multi-Lingual Support on page 65.

- The SNMP Configuration tab is where you configure MaxACD to work with a third-party management console to set up SNMP traps; see Configuring SNMP Support on page 18.

- The Presence Mapping tab is where you map various agent states to Lync/Skype for Business states; see Configuring Lync/Skype Presence Mapping on page 22.

- The Redundancy tab is where you can perform manual switchovers from one server to another, and where you can check the details of the most recent switchover. See the chapter Configuring Redundancy on page 93 for details on redundancy.
Viewing Server Information

The **Server** tab of the System menu shows you the servers that were configured during installation. For each, you will see the current state (Active, Inactive, and so on). It also shows the Web Server Host name, which identifies the web server to which the server is currently connected.

No changes can be made to this information.

![Figure 12. The System > Server tab](image)

Defining the Main Phone Number

To set the main phone number for your system,

1. On the **System** menu, choose **Server**.

![Figure 13. Entering the system’s main phone number](image)

2. In the Phone Number section, enter the following information.

<table>
<thead>
<tr>
<th>Phone Number Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>System Main Number</td>
<td>Enter the main phone number for your company.</td>
</tr>
<tr>
<td>Incoming Call DNIS Length</td>
<td>Indicate the length of incoming calls; the default is 7 digits.</td>
</tr>
</tbody>
</table>
Configuring Exchange Integration

To set up Exchange integration,

![Figure 14. Enabling Exchange Integration](image)

2. In the Exchange Integration section, enter the following information.

<table>
<thead>
<tr>
<th>Exchange Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Exchange Integration</td>
<td>Select this option to enable two-way synchronization between a user’s MaxACD voicemail and the user’s Outlook mailbox.</td>
</tr>
<tr>
<td>Client Access Server Address</td>
<td>The DNS name of the Exchange server (do not enter the IP address).</td>
</tr>
<tr>
<td>Exchange UM Subscriber Access</td>
<td>Click Select to choose the Exchange UM Subscriber access; the list is populated from the Active Directory.</td>
</tr>
</tbody>
</table>

Configuring Message Notification

To set up message notification,
2. Under Message Notification, enter the following information:

<table>
<thead>
<tr>
<th>Message Notification Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Retry Count</td>
<td>The number of times the system will try to deliver a voice message notification after the original attempt (0-16).</td>
</tr>
<tr>
<td>Retry Interval (in minutes)</td>
<td>The number of minutes between retry attempts (5-60). Your choices are in 1-minute increments. The default is 5 minutes.</td>
</tr>
</tbody>
</table>
Configuring Reports

Use the Reports tab of the System menu to indicate where to log the call detail records (CDRs).

![Image of System > Call Reports tab](image)

**Figure 15.** The System > Call Reports tab

Adding Log Services

To add a new log,

1. On the System tab, choose Reports.
2. In the Log Service section, click Add Log Service. A new row appears below the others.
3. Select the checkbox to enable the new service; clear the checkbox to disable the service.
4. Complete the following information, and then click Update.

<table>
<thead>
<tr>
<th>Call Report Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>A descriptive name for this log service.</td>
</tr>
<tr>
<td>Server</td>
<td>The IP address where you want to store this log data.</td>
</tr>
<tr>
<td>Port</td>
<td>The port for the Server IP address.</td>
</tr>
<tr>
<td>Password</td>
<td>A password for this Call report. If you do not enter a password, the password is set to “Default.”</td>
</tr>
</tbody>
</table>

To update a log, click Edit beside the report that you want to update, make your changes, and then click Update.

To remove a log, click Delete beside the service that you want to remove.
Defining Account Codes

Configuring Database Options

To specify a data retention period and an archive interval,
1. On the System tab, choose Reports.
2. In the Internal Database Configuration section, choose your options.

<table>
<thead>
<tr>
<th>Database Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Active database retaining period ___ months</td>
<td>Enter the number of months that you want to retain the information; enter a number between 1 and 12. For example, if you want to retain 2 months worth of data, enter 2 here.</td>
</tr>
<tr>
<td>Archive purged records</td>
<td>How many month’s worth of records to archive in each archive file. Enter a number between 1 and 12. For example, if you enter 3, then each archive file will store three month’s worth of records.</td>
</tr>
</tbody>
</table>

Defining Account Codes

Use the Account Code tab to establish various accounting or other internal codes, to assign incoming and outgoing calls to codes for billing, tracking, or forecasting purposes system-wide.

![Figure 16. The System > Account Code tab](image)

To add a new account code,
2. Click Add Account Code. A new row appears, below any existing rows.
3. On the new row, type a name and a numeric account code, and then click Update. The account code may contain 1-10 digits.

**Note:** You can modify, or even delete, existing account codes. If you do so, be aware that any historical reports that include changed or deleted account code information will be impacted.

To edit an existing account code,
2. Click Edit beside the code that you want to update.
3. Make your changes to either the name or the code, and then click Update.

To remove an account code, click Delete beside it.
Once these codes are set up, you can set options for each user to indicate whether account codes must be entered for each call. See the discussion in Configuring User Details on page 27 for instructions.

**Defining Logout Reason Codes**

In a workgroup environment, logout reason codes allow agents to specify why they are signing off from the workgroup, and the manager can view that information. If logout reasons are required, the system requests a reason when an agent logs out. Logout history can be tracked and stored for future analysis.

Use the **Logout Reason Code** tab to establish standard codes for agents logging out of workgroups.

You can define up to 20 logout reason codes.

![Logout Reason Code](image)

*Figure 17. The System > Logout Reason Code tab*

To configure logout reason codes,

1. On the **System** menu, choose **Logout Reason Code**. Any codes that have already been defined will appear.
2. Add new entries by typing a description on any empty line.
3. To require that agents must select a logout reason code when they log out of workgroups, check the option **Logout Reason Code Required**.

**Note:** You can modify, or even remove, existing logout reasons. If you do so, be aware that any historical reports that include changed or removed logout reason information will be impacted.

To rename a logout reason code,

1. On the **System** menu, choose **Agent Logout Reason**.
2. Type over the existing name to rename a code.

To remove a logout code,

1. On the **System** menu, choose **Agent Logout Reason**.
2. Clear the entry for the code that you want to remove.
Configuring Call Recording

MaxACD uploads recording files to VRManager via FTP. Recording applies to voice calls; it does not apply to chat sessions.

To use the centralized call recording function, make sure the following requirements are met:

- You need a recording seat license for each extension that will be recording (except for recording to a user’s voicemail).
- It is recommended that you have a separate storage server to store recorded files.
- Recorded files (16kbps Mono WMA format) can be managed by the VRManager (licensed) application.
- You must set up an FTP server to facilitate the call recording transfer.
- Because recording files require a large amount of disk storage space, a SAN (Storage Area Network) is recommended, unless VRManager is used.

Description of the Recorded File Name

The recorded file name contains the following information:

- `Rmmddyyyy_hhmmss!callerID!calleelID!workgroupID!DNIS!sessionID!R`  
  - `mmddyyyy_hhmmss` is the time stamp when the recording starts
  - `callerID` is the caller ID or the internal extension ID. It could also be:
    - `bgn` for barge-in call
    - `sm` for a silent monitor call
    - `trk(bbcc)` for an inbound trunk call without caller ID. `bb` is the board logical ID and `cc` is the channel ID
  - `calleelID` is the target number or `trk(bbcc)`
  - `workgroupID` is the workgroup number for a workgroup call, or `ext` for extension call
  - `DNIS` is the DNIS number or `NA` for no DNIS number
  - `sessionID` is the CDR session ID

Configuring Recording

To configure system-wide call recording,

1. On the **System** tab, choose **Call Recording**.

![Call Recording](image)

*Figure 18. The System > Call Recording tab*
2. Set the recording options for your environment:

<table>
<thead>
<tr>
<th>Recording Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Centralized Recording</td>
<td>Check this option to turn on centralized call recording.</td>
</tr>
<tr>
<td>FTP Server</td>
<td>The IP address of the FTP server.</td>
</tr>
<tr>
<td>FTP Path</td>
<td>The directory that the files will be transmitted to on the FTP server.</td>
</tr>
<tr>
<td>FTP Access Account</td>
<td>The FTP server account name that MaxACD can log into.</td>
</tr>
<tr>
<td>Password</td>
<td>The FTP account password.</td>
</tr>
</tbody>
</table>

3. Click the **Test FTP** button to verify that MaxACD can log into the FTP server successfully.

**Note:** You can configure call recording options for specific workgroups. See *Configuring Workgroup Recording* on page 61.

⚠️ **Warning!**

If you are using FTP protocol, the FTP server must be installed and configured properly on the same machine as the **Central Location** directory.

An FTP folder must be created for the **Central Location**, so that it can be fully accessible through FTP.

**Note:** It is strongly recommended that you use VRManager to manage centralized recording and that you save recordings to a local drive or network attached storage on the gateway that is running MaxACD.

**Configuring SNMP Support**

SNMP (Simple Network Management Protocol) is used in network management systems to monitor network-attached devices for conditions that warrant administrative attention.

The MaxACD SNMP configuration, used with a third-party management console, helps you monitor the MaxACD alerts so that you can use MaxACD more securely.

Using an SNMP v3 agent, MaxACD sends SNMP traps to the management console when alarm conditions are detected.
Configuring SNMP Support

To configure SNMP support,
1. On the System tab, choose SNMP Configuration.
2. Check Enable SNMP Traps.
3. Provide the following information:

<table>
<thead>
<tr>
<th>SNMP Configuration Fields</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>SNMP Management Station Address</td>
<td>The IP address of the SNMP Management console that you are using.</td>
</tr>
<tr>
<td>SNMP Management Station Port</td>
<td>The port for the SNMP Management Station IP address</td>
</tr>
<tr>
<td>Security Level</td>
<td>• No Authentication and No Privacy</td>
</tr>
<tr>
<td></td>
<td>• Authentication Without Privacy</td>
</tr>
<tr>
<td></td>
<td>• Authentication and Privacy</td>
</tr>
<tr>
<td>Security User Name</td>
<td>The user name.</td>
</tr>
<tr>
<td>Authentication Method</td>
<td>If you chose a security level, specify the method:</td>
</tr>
<tr>
<td></td>
<td>• None (no authentication)</td>
</tr>
<tr>
<td></td>
<td>• MD5 – Use a Message-Digest algorithm for encryption</td>
</tr>
<tr>
<td></td>
<td>• SHA – Use a hash function algorithm for encryption</td>
</tr>
<tr>
<td>Authentication Password</td>
<td>The password that will be used to authenticate SNMP messages</td>
</tr>
</tbody>
</table>

**Note:** The SNMP traps are sent by the MaxACD AS (Server up, Server down traps), AltiKeep (warm start trap), and AltiServ (all other traps), so those services must be started, or the traps will not be sent.
Chapter 3: System Configuration

To use SNMP, you need an SNMP management console that is SNMP v3-supported for receiving and collection. If you’re not already using a management console, consider MG-Soft Trap Ringer Professional Edition, available from MGSoft Corporation.

You can get help about how to configure an SNMP User Account and Management Console Port in that product’s Help system.

**Note:** AltiGen’s IANA Private Enterprise Number is 13679.

### List of SNMP Traps

A trap is sent when the following conditions are detected.

- MaxACD server status changes to up. (Specific trap) This trap is sent when the MaxACD server is up.
- MaxACD server status changes to down. (Specific trap) This trap is sent when the MaxACD server is down.
- MaxACD Proxy server status changes to up. This trap is sent when MaxACD Proxy server is up.
- MaxACD Proxy server status changes to down. This trap is sent when MaxACD Proxy is down.
- Redirector server status changes to up. (Specific trap) This trap is sent when Redirector is up.
- Redirector server status changes to down. This trap is sent when Redirector is down.
- Excessive memory usage on MaxACD. (Specific trap) This trap is sent when MaxACD detects the lowest virtual memory usage exceeds a specified percentage of physical memory configuration within 10-minute period.
The next trap will be sent after the condition is cleared then occurs again. The minimum duration between any two consecutive traps is 30 minutes.

- Excessive CPU utilization on MaxACD. (Specific trap) This trap is sent when MaxACD detects that its average CPU utilization exceeds a specified percentage in any 10-minute duration. The next trap will be sent after the condition is cleared then occurs again. The minimum duration between any two consecutive traps is 30 minutes.
- Excessive hard disk usage on MaxACD. (Specific trap) This trap is sent when hard disk usage of MaxACD transitions from below threshold to on or above threshold is detected. The minimum duration between any two consecutive traps is 30 minutes.
- Redundancy switch-over. (Specific trap) This trap is sent when a redundancy switch-over between the active and the standby server is detected. This trap is reported by the newly activated MaxACD AS.
- A MaxACD server component is up or down.
- MaxACD Application server status is changed to up.
- MaxACD Application server status is changed to down.
- MaxACD Proxy server status is changed to up.
- MaxACD Proxy server status is changed to down.
- Redirector server status is changed to up.
- Redirector server status is changed to down.

### SNMP Trap OID Numbers

The following table identifies SNMP trap numbers.

<table>
<thead>
<tr>
<th>OID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.3.6.1.6.3.1.1.5.1</td>
<td>MaxACD cold started // AltiWare started</td>
</tr>
<tr>
<td>1.3.6.1.6.3.1.1.5.2</td>
<td>MaxACD warm started // AltiWare started by AltiKeep</td>
</tr>
<tr>
<td>1.3.6.1.6.3.1.1.5.3</td>
<td>[T1/E1/PRI Span</td>
</tr>
<tr>
<td>1.3.6.1.6.3.1.1.5.4</td>
<td>[T1/E1/PRI Span</td>
</tr>
<tr>
<td>1.3.6.1.6.3.1.1.5.5</td>
<td>Authentication failure</td>
</tr>
<tr>
<td>1.3.6.1.6.3.1.1.5.6</td>
<td>egpNeighborLoss</td>
</tr>
<tr>
<td>1.3.6.1.6.3.1.1.5.7</td>
<td>Enterprise specific</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>OID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.3.6.1.4.1.13679</td>
<td>AltiGen enterprise OID</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.1</td>
<td>Softswitch up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.2</td>
<td>Softswitch down</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.3</td>
<td>Gateway up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.4</td>
<td>Gateway down</td>
</tr>
</tbody>
</table>
Configuring Lync/Skype Presence Mapping

You can map various Lync/Skype for Business Presence states to agent Ready or Not Ready states. When an agent’s Presence state changes, the agent state will be changed accordingly.

For example, if the agent changes his or her Lync/Skype for Business Presence to Busy, the agent state has to option to be changed to Not Ready and no workgroup calls will be sent to this agent. When the agent’s Presence is changed back to Available, the agent state changes to Ready and the agent will receive workgroup inbound calls.

To configure Presence mapping,
2. For each Presence state, select a corresponding agent state. The choices will vary from one presence to another.

<table>
<thead>
<tr>
<th>Enterprise-specific SNMP Trap Number</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1.3.6.1.4.1.13679.5</td>
<td>VoIP domain server up /enterprise server master up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.6</td>
<td>VoIP domain server down</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.7</td>
<td>VoIP domain slave up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.8</td>
<td>VoIP domain slave down</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.9</td>
<td>IP phone service up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.10</td>
<td>IP phone service down</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.11</td>
<td>Voicemail server up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.12</td>
<td>Voicemail server down</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.13</td>
<td>CT proxy service up</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.14</td>
<td>CT proxy service down</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.15</td>
<td>High memory usage</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.16</td>
<td>High CPU usage</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.17</td>
<td>Low hard disk space</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.18</td>
<td>Redundancy switchover</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.19</td>
<td>AltiGen IP phones redirect to an alternative server</td>
</tr>
<tr>
<td>1.3.6.1.4.1.13679.20</td>
<td>AltiGen IP phones redirect back</td>
</tr>
</tbody>
</table>
Figure 20. The System > Presence mapping tab

<table>
<thead>
<tr>
<th>Lync Presence Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ready</td>
<td>The agent is ready to accept calls.</td>
</tr>
<tr>
<td>Not Ready</td>
<td>The agent is not ready to accept calls.</td>
</tr>
<tr>
<td>Do Not Disturb</td>
<td>The agent is not ready to accept calls.</td>
</tr>
<tr>
<td>Workgroup Logout Dialog Box</td>
<td>The agent is presented with logout options.</td>
</tr>
<tr>
<td>Connect</td>
<td>The agent is currently in a call, no new calls can be accepted until the agent returns to a Ready state.</td>
</tr>
<tr>
<td>Unstaffed</td>
<td>The Lync client is signed out.</td>
</tr>
</tbody>
</table>

Note: In prior MaxACD releases, if the agent was in Not Ready state, logging into a workgroup would change the agent state to Ready. In Release 7.0, logging into a workgroup no longer changes the agent Ready/Not Ready state.
Chapter 3: System Configuration
Web Chat Configuration

For details on deploying the Web chat feature, follow the steps in the *MaxACD 7.0 Web Chat Deployment Guide*. The parameters on the Admin > Chat Configuration tab are described there, in the context of the chat deployment process.

*Figure 21. The Web Chat Configuration tab*
Configuring User Options

MaxACD 7.0 is designed so that you can manage user membership via Active Directory. When a change is made in Active Directory, MaxACD will get the update automatically.

Take the following considerations into account when changing or removing users:

• If a user is deleted from Lync/Skype for Business, the user will also be deleted from MaxACD.
• If the SIP URI of a user changes, you must delete the user from MaxACD and then add the user back as a new user.

The User tab is where you configure user options.

The General tab is where you can to the following:

• Assign client seat licenses to users; see Assigning Client Licenses to Users on page 28.
• Set various voice and chat options for users; see Configuring User Voice and Chat Attributes on page 29.
• Configure account code options; see Configuring User Account Code Options on page 30.
• Add Lync users into the system; see Adding Active Directory Users into MaxACD on page 31.

The Group Membership tab is where you assign users to workgroups; see Assigning Users to Workgroups on page 31.

The Monitor List tab is where you grant specific monitor permissions to users; see Granting Monitor Privileges to Users on page 34.

The Notification tab is where you configure various alerts for users; see Configuring Redundancy Notifications on page 35.

Note: To add or update Administrative users, see Configuring Admin Users on page 95.

Configuring User Details

Once your users are imported from the Active Directory, you can enable licenses and customize details for each user as needed.

When you enter details for a user, you can apply the current settings to just the current user or to several users. To apply settings to multiple users, click Apply To and choose the users from the list.
Assigning Client Licenses to Users

To assign client licenses to users and to configure other options,

1. On the User menu, choose General.

2. In the Name panel, select the user's name. You will see details for that user on the right.
   The fields in the Personal Information section, such as Line URI, SIP URI, UPN, and Email, are pulled from the records in Active Directory; they cannot be changed here.

3. Select the licenses to assign to this user in the License Assignment section.
Figure 24. Assigning media licenses to an agent

Notes:

- If no more licenses are available for a specific client, you will see a warning message when you click OK.
- If you assign an Agent Basic license to an agent but do not assign either a voice or chat license, you will see a warning message when you click OK. You must assign at least one media license if you assign an Agent Basic license.

Configuring User Voice and Chat Attributes

To configure voice and chat attributes for a user,

1. On the User menu, choose General.
2. In the Name panel, select the user’s name.

Figure 25. User voice and chat attributes

3. Configure the options as appropriate.

<table>
<thead>
<tr>
<th>User Attribute</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Voice Settings</td>
<td></td>
</tr>
<tr>
<td>Enable Dial-by-Name Service</td>
<td>Check this option to allow callers to find this user by dialing the user’s name. Note: The Dial-by-name feature only supports English.</td>
</tr>
<tr>
<td>Number of seconds before handling</td>
<td>Specify how many seconds the system should wait before handling incoming calls for this user.</td>
</tr>
</tbody>
</table>
Chapter 5: Configuring User Options

Configuring User Account Code Options

To configure account code options for a user,

1. On the User menu, choose General.
2. In the Name panel, select the user’s name.

3. In the Account Code section, choose the appropriate options for this user.

<table>
<thead>
<tr>
<th>Account Code Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Forced Account Code</td>
<td>Prompts the user to enter an account code when placing calls in MaxAgent. If you enable this feature, you can choose additional options:</td>
</tr>
<tr>
<td></td>
<td>• Override Allowed – Allows this user to press # to bypass entering an account code.</td>
</tr>
<tr>
<td></td>
<td>• Account Code Validation – Forces this user to enter a valid account code, by having MaxACD validate the user’s entry before placing the call.</td>
</tr>
<tr>
<td>Block Account Code Display</td>
<td>If you select this option, then the account code list will not appear when the user tries to enter an account within MaxAgent. This prevents users from seeing account codes that they do not need to see.</td>
</tr>
</tbody>
</table>

Caller ID

Each user will have an assigned a caller ID number. When an outgoing call is made by this extension, the caller ID number entered in this field will be transmitted to the receiving caller.

This is a numeric field; enter numerals only.

For outbound MaxAgent workgroup calls, MaxACD will use the agent’s Caller ID entry as the transmitted Caller ID.

If this field is empty, MaxACD will use the Line URI number; if the Line URI has not been defined in Lync, MaxACD will use the System Main number as transmitted Caller ID. (System Main Number is found on the System Server tab.)

Note: Make sure your service provider and SIP gateway/SIP trunk support Transmitted Caller ID. If they don’t support TID, then the number you enter into this field will not be presented for outbound calls.

Chat Settings

Display Agent Name

Enter the name to display to the customer/associate in Chat sessions.

Figure 26. User Account Code options
Adding Active Directory Users into MaxACD

You can add users that are in the Active Directory.

To add an Active Directory User into the system,

1. On the User menu, choose General.
2. Below the Name panel on the left, click Add.
3. Click Search.
4. Enter the name (or part of the name) and click Search.

Figure 27. Click Search to find the user

- You can search by first name, last name, or UPN.
- You can use a space in your search criteria to separate the first name from the last. For example, entering B space H will list all users whose first name begins with the letter B and whose last name begins with the letter H.

5. In the search results, click the name of the user and then click Done. (If you want to add several users at a time, you can continue to add other users by clicking their names, and then click Done after you have added them all.) The user will be added into MaxACD, and the name will appear in the Name pane (which is sorted in alphabetical order).

Note: The search results will only list those users who are not already in MaxACD. In other words, Lync users who are already in MaxACD will not be listed in the search results. If your search does not return the user that you expect, scroll the list in the left pane to see if they are already in the system.

6. Configure details for the user (see Assigning Client Licenses to Users on page 28 for descriptions).

Removing Users from MaxACD

To remove a user, select the user name in the left panel and click Delete. The user remains in the Active Directory; the user no longer appears in the MaxACD.

Assigning Users to Workgroups

You can add Lync users to workgroups on the User > Group Membership tab. (You can also do this on the Workgroups > Group Member tab.)

Users can belong to multiple groups.

To add a user to an existing workgroup,

1. On the User menu, choose Group Membership.
2. In the Name panel, select the user’s name. You will see the workgroups the user belongs to in the Member list.
Figure 28. The User > Group Membership tab

3. To add this user to a workgroup, select that workgroup in the Non-Member List and click <Add. That group should now appear in the Member List. (To remove the user from a workgroup, select the group in the Member List and click Remove.)

4. Configure the workgroup options for this user (the settings you choose here will only apply to this workgroup; you can have custom settings for this user for each workgroup).

<table>
<thead>
<tr>
<th>User Workgroup Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personalized Answer Announcement</td>
<td>Use this option to configure a personal answer announcement for this agent. You can configure a text announcement for chat sessions and a voice announcement for calls. See Configuring Personal Answer Announcements on page 33 for details.</td>
</tr>
<tr>
<td>Allow Workgroup Wrap-up Time</td>
<td>Allows this user to have wrap-up time. Wrap-up time is a system delay between the time an agent finishes a workgroup call and the time the next workgroup call is routed to the extension. It gives the agent time to finish up with notes, prepare for the next call, log out of the group, or click the “Not Ready” button in MaxAgent. You can set a wrap-up time of up to 29 minutes, 59 seconds. Note that agents will still get direct calls during wrap-up time.</td>
</tr>
<tr>
<td>Chat Inter-session Delay</td>
<td>Select this option if you want to allow a delay between chat sessions; specify the minutes and seconds to delay the next incoming chat session.</td>
</tr>
</tbody>
</table>
Configuring Personal Answer Announcements

You can configure custom answer announcements each agent, for both chat sessions and voice calls. Agents can have one custom announcement phrase per workgroup.

1. On the User menu, choose Group Membership.
2. In the Name panel, select the user’s name.
3. Click the button beside Personalized Answer Announcement.

<table>
<thead>
<tr>
<th>User Workgroup Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Maximum Number of Concurrent Chat Sessions</td>
<td>Enter the maximum number of concurrent chat sessions that you want this agent to handle.</td>
</tr>
<tr>
<td>Enable Chat Auto-Answer</td>
<td>Select this option if you want to enable the Auto-answer for this agent.</td>
</tr>
<tr>
<td>Allow Pickup Call from Workgroup Queue</td>
<td>Allows this user to pick up calls or chat sessions from the user’s workgroups. The agent must be logged in to a workgroup in order to pick up calls or chats.</td>
</tr>
<tr>
<td>Log Outbound Call to Workgroup</td>
<td>The workgroup to which you want to log this user’s outbound calls in MaxAgent. Logging outbound calls is useful for call detail reporting and group statistics. All calls made by the agent while logged into the group will be tracked as calls from the Workgroup. If the agent is not logged into the workgroup that you assign here (or to whichever workgroup the agent set for logging calls), then the agent cannot make outbound workgroup calls. If the Allow Agent to Change Outbound Workgroup check box is selected, this user can change the outbound group from within MaxAgent. Note: If you do not specify a workgroup here, then the agent will not be able to make outbound workgroup calls from MaxAgent.</td>
</tr>
<tr>
<td>Allow Agent to Change Outbound Workgroup</td>
<td>Allows the user to change the workgroup for logging outbound calls.</td>
</tr>
</tbody>
</table>
4. In the window that opens, select **Voice** or **Chat**.

5. If the agent is assigned to multiple workgroups, highlight the workgroup that you want to configure. (You can copy an announcement to other workgroups as needed.)

6. Click **Choose File** and upload the phrase. If you are configuring the announcement for a chat workgroup, you must upload an .HTM file. If you are configuring the announcement for a voice workgroup, you must upload a .WMA file.

7. Once the file has uploaded, click **OK**.

8. Check the **Enable Personalized Answer Announcement** option to enable the feature.

9. To copy an announcement from one workgroup to another, check the checkbox for the target workgroups and click the **Copy To** button. Note that you can only copy announcements to workgroups of the same media type; in other words, you can copy a voice announcement only to other voice workgroups, and you can copy a text announcement only to other chat workgroups.

10. When you have finished configuring the announcements for this agent, click **Done** to close the panel.

If you want to download a phrase, select that workgroup (if the agent is part of multiple workgroups) and then click **Download**. The phrase file that is assigned to the workgroup will be downloaded to the location that you specify.

**Note:** You will not be able to click another agent in the Names list while you are in this panel. When you have finished configuring announcement files for the current agent, you must click **Done**. You will return to the **User > Group Membership** tab, where you can select another agent to configure as needed.

**Tip:** To embed the agent's name into the phrase, use %f (first name) and %l (last name) in the HTML phrase. For more about chat phrases, see *HTML Web Chat / Agent Announcement Stylesheets* on page 85.

## Granting Monitor Privileges to Users

You can configure monitor privileges for each user. Once you have set up such privileges, the user can receive call events for those monitored extensions.
Configuring Redundancy Notifications

If you have configured a redundant MaxACD system, then you can indicate, for each Lync user, whether they should be notified when there is an issue regarding MaxACD system redundancy. If you have not configured redundancy, these fields will not be available.

These fields are not currently enabled for Hosted MaxACD deployments.

Note: In order to notify an Admin user when there is a redundancy issue, the Admin user must have a SIP URI or phone number.
Either of the following two conditions can trigger notifications to be sent:

- If the system switches from the active server to the standby server
- If the standby server’s status changes to “Down,” which indicates that the standby server has a problem

To have a user receive notification when there is an issue regarding MaxACD system redundancy,

1. On the **User** menu, choose **Notification**.

   ![Figure 31. The User > Notification tab](image)

2. In the Name panel, select the user’s name.
3. Check the **Notify user of Redundancy issues** option.
4. For the destination, choose either **Phone** or **SIP URI**.
   - If you choose **SIP URI**, either type the address or click the button to search for the appropriate SIP address for the user.
5. Choose when to begin playing the message: enter a specific number of seconds of delay after the call is answered.
Configuring Workgroups

In MaxACD, users and agents are typically organized into workgroups. Workgroups are an automatic call/chat distribution feature designed to use with queuing, distribution, agent management, real-time status, and logging abilities.

As of Release 7.0, workgroups can be either voice workgroups, to handle calls, or chat workgroups, to handle chat sessions. Workgroups cannot handle both types of media; they can handle one or the other.

There are nine tabs in the Workgroup window. The In Queue IVR, Call Recording, and Notification tabs do not apply to chat workgroups.

Figure 32. The tabs on the Workgroup menu

- The General tab is where you create workgroups and configure voicemail and service level options for them. See Creating New Workgroups on page 41.
- The Group Members tab is where you add or remove members from workgroups. See Establishing Workgroup Membership on page 44.
- The Session Handling tab is where you set call forwarding, call waiting, and call handling preferences and options. See the following topics:
  - Configuring Busy Handling Options on page 50
  - Configuring Forwarding on page 50
  - Configuring No-Answer Handling on page 52
- The Skill-Based Routing tab is where you define skill levels and skill-based routing rules. See Configuring Skill-Based Routing on page 47.
- The Business Hours tab is where you set business hours for workgroups. See Defining Workgroup Business Hours on page 45.
- The Queue tab is where you set options for queue phrases, queue announcements, and queue overflow routing. See Configuring Queue Options on page 57.
- The In Queue IVR tab is where you design voice menus for callers in queues. This tab is not available for chat workgroups. See Configuring Queue IVR Responses on page 60.
- The Call Recording tab is where you set call recording rules for the workgroup. (This tab is not available for chat workgroups.)
• The Notification tab is where you set options for workgroup voice mail notifications. (This tab is not available for chat workgroups.) See Configuring Voicemail Notifications on page 63.

**Figure 33. The WorkGroup > General tab**

**About Chat Workgroups**

Chat workgroups are a new feature that has been introduced in Release 7.0.

With Web Chat workgroups, customers and/or associates can chat with agents in those workgroups either by clicking a "Chat" link on your web page or via their Lync or Skype for Business client.

In order to chat with an agent, the MaxAgent desktop must have Microsoft Silverlight installed.

You must deploy the Web Chat feature on your server before you can configure Chat workgroups; refer to the MaxACD Web Chat Deployment Guide for instructions.

The general process of deploying chat groups is as follows:

1. Deploy the Web Chat feature (follow the steps in the MaxACD Web Chat Deployment Guide)
2. Configure chat phrases, introductions, and announcements as needed (refer to HTML Web Chat / Agent Announcement Stylesheets on page 85).
3. Create chat workgroups and configure their members, their routing options, session handling options, and other parameters, just as you have done with voice workgroups in the past.

**Note:** If you have a voice workgroup and want to create a chat workgroup of the same name, click the Add Media button and configure the new workgroup. The names stay coordinated; in other words, if you rename one of the workgroup pairs, the other group is automatically renamed for you.
4. Assign Chat Media licenses to agents who will be members of chat workgroups.

The Agent’s Perspective

Some notes about agents in multiple workgroups:

• Agents can be members of multiple workgroups; this means that a user may be a member of both multiple voice workgroups and multiple chat workgroups.

• An agent can handle only one voice call OR chat sessions simultaneously. In other words, an agent cannot handle a voice call at the same time as handling a chat session.

• An agent can handle multiple chat sessions simultaneously.

There is a user setting within the Administrator Portal where you can set the maximum number of concurrent chat sessions that the system will allow the agent to handle. (On the User > Group Membership tab.)

Once an agent reaches the maximum chat session count specified in the Administrator Portal, the system will not distribute any more chat sessions.

Agents can also temporarily set their Lync/Skype status to Not Ready, to prevent the system from sending any more chat sessions to them.

Agents (and administrators) can configure chat Auto-answer settings, just as with voice calls (on the User > Group Membership tab). With incoming chat sessions, there will be no ringing dialog box - the chat is answered automatically.

You can display an agent’s name to chat customers by entering it into the Display Agent Name field (on the User > General tab).

Behind the Scenes

Chat sessions are considered the same as voice calls, in that they can be routed to an available agent according to workgroup call distribution logic. Chat sessions can be sent to the workgroup queue if no agents are available, just as with voice calls. Chat sessions can also have priority queueing and skill based routing.

A chat session reaches the workgroup queue in one of two ways: via a link on a web browser or via a Lync or Skype for Business client. Following is an overview of the process:

1. A web user clicks a link on a web page hosted on the company web server.
2. The web user is redirected to the Web Chat server. The user fills out a web form then clicks the Chat button.
3. The web client initiates an HTTPS chat session to target a specific SIP URI using Web SDK.
4. The Lync/Skype for Business server routes the chat session to the MaxACD Proxy.
5. The MaxACD Application server and Lync Proxy server collaborate to queue this chat session and find an available agent.
6. MaxAgent opens a dialog box to “ring” the available agent, and the agent accepts the chat request.
7. The Proxy server creates a conference bridge and connects the agent and the customer.
8. MaxACD logs the chat session details and the Web Chat server logs web form data into the CDR database.

Altigen has provided an example for a web front-end button, which customers or associates can click to request a chat session.

Parameters Modified for Chat Sessions

The following parameters have been modified to support chat sessions:

• URI Routing
• URI Routing support for chat media has been added, where both voice and chat media may share the same SIP URI
• For call forwarding, you can forward to chat workgroups, chat IVR, or a SIP URI
• IVR
• IVR for chat media is added, where both voice and chat may share the same SIP URI
• Only Advanced Call Router actions are supported
• Holiday
• Chat-based holiday entries are supported, so that voice and chat sessions can take different routes
• For call forwarding, chat workgroups support chat IVR and SIP URI forwarding targets
• Phrase Management
• HTML-based text phrases are supported
• Inline style sheet support for phrases to allow easy system message text style changes
• Workgroup
• Chat workgroup call forwarding targets are chat workgroups, SIP URI, and Announcement Message
• Pick up a chat from the queue is supported
• Chat supervision for silent monitoring and barge-in
• Incoming chat-related statistics have been added to the agent’s workgroup RTM data; this can be displayed in both MaxSupervisor and MaxReports
• A greeting message can be displayed to the customer when the chat is put into the queue; an answer announcement can be presented to the customer when the agent answers the chat request (For more about chat phrases, see HTML Web Chat / Agent Announcement Stylesheets on page 85).
• A chat session disconnection announcement can be presented, to let the customer know that the chat session has ended.
• The wrap-up state is invoked only after the last chat session has disconnected
• Handling:
  • Group RNA/Logout Handling - You can route the session to a workgroup, a workgroup queue, or a SIP URI, or you can play an announcement.
  • Ring All Available Members option in Intra Group Distribution is not available
  • Busy handling - You can forward to the workgroup queue, to another workgroup, to a SIP URI, or play an announcement
  • No Answer handling - You can forward to the next group member, to another workgroup, to a SIP URI, or play an announcement
  • Set RNA Agent Log Out - You can log the agent out of this workgroup if a chat goes unanswered
  • RNA Not Ready - You can set the agent’s state to Not Ready if a chat request is not answered
  • Forwarding - You can forward the chat to another workgroup, to a SIP URI, or play an announcement

**Parameters Not Available for Chat Workgroups**

When configuring chat session handling, make sure that the handling/forwarding targets support the same media type as the workgroup that you are configuring. For example, make sure that chat sessions are forwarded to chat workgroups and not to voice workgroups.

All of the MaxACD voice call features apply to Chat workgroups, with the following exceptions:

• The parameters on the following tabs are not supported:
Creating New Workgroups

Note: The ability to add and delete workgroups is enabled for Administrator users. Workgroup Supervisors do not have the privileges to perform these tasks.

To create a new workgroup,
1. On the Workgroup menu, choose General. You will see the workgroups that have already been set up.
2. Below the Name panel, click Add.
3. Configure the information about the workgroup, and then click OK.

<table>
<thead>
<tr>
<th>Group Information Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group Name</td>
<td>A unique name for this workgroup.</td>
</tr>
</tbody>
</table>
### Deleting Workgroups

Before you delete a workgroup, we recommend that you check whether any URI routing rules or Caller ID Routing rules send calls or chats to that workgroup, and adjust those rules accordingly.

When you delete a workgroup, that workgroup will be removed from any routing rules that were configured to send calls or chats to that workgroup. Until you update those routing rules, calls will automatically be routed to the System IVR.

To delete an active workgroup, select the name of the workgroup in the Name panel and click Delete.

### Renaming Workgroups

To rename a workgroup,

1. Select the name of the workgroup in the Name panel.
2. Edit the name in the Group Name field and click OK.

**Note:** If you rename a workgroup that is one of a named “pair,” the other workgroup will automatically be renamed for you. For example, if you have a voice workgroup named Sales-West, and from that workgroup you clicked Add Media to create a chat workgroup named Sales-West.Chat, then renaming one will rename the other as well.

### Configuring Workgroup Voicemail

Workgroup voicemail applies to voice workgroups only; it does not apply to chat workgroups.

Workgroup voicemail uses Microsoft Exchange as the voicemail server. Voice messages are stored on the Exchange server and are synchronized to the MaxACD server. MaxACD supports .WMA, .MP3, and other Wave media formats for voicemail.

Users can access voicemail messages through MaxAgent or through MaxSupervisor. In order to listen to voicemail messages, MaxAgent and MaxSupervisor users must have Windows Media Player installed on their systems.

In order to allow members to listen to workgroup voicemail messages, you must configure a user voicemail account for the workgroup, with an associated email address, and associate it with a Lync/Skype Enterprise Voice user account.

To set up voicemail options for a workgroup,

1. On the **Workgroup** menu, choose **General**.
2. In the **Name** panel, select the workgroup that you want to configure.
3. In the Voicemail section, choose your options.

<table>
<thead>
<tr>
<th><strong>Group Voicemail Field</strong></th>
<th><strong>Description</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Workgroup Voicemail</td>
<td>Controls whether voicemail is enabled for this workgroup.</td>
</tr>
<tr>
<td>Enable Agent to Access Workgroup Voicemail</td>
<td>Whether members of this workgroup can listen to workgroup voicemail messages.</td>
</tr>
<tr>
<td>SIP URI</td>
<td>The SIP URI for the Lync user you configured for workgroup voicemail.</td>
</tr>
<tr>
<td></td>
<td>Either type the address or click the small button to search for the appropriate</td>
</tr>
<tr>
<td></td>
<td>account.</td>
</tr>
<tr>
<td>Email</td>
<td>The email address for or the Lync user you configured for this workgroup.</td>
</tr>
<tr>
<td></td>
<td><strong>Note:</strong> Use a unique email address for each workgroup. Do not use the same</td>
</tr>
<tr>
<td></td>
<td>email address as another workgroup on a different MaxACD server.</td>
</tr>
</tbody>
</table>

**Configuring Workgroup Service Levels**

Service level is a service quality index which calculates the percentage of calls or chat sessions serviced within a defined threshold for the defined period of time. The term “serviced” may not necessarily mean answered. You can define the calculation method based on your operation requirements.
The service level percentage is calculated from midnight 00:00 a.m. and is reset daily. The calculated number will be sent to the MaxAgent and MaxSupervisor applications.

To configure service levels for a workgroup,
1. On the **Workgroup** menu, choose **General**.
2. In the **Name** panel, select the workgroup that you want to configure.
3. In the **Service Level** section, choose your options.

### Establishing Workgroup Membership

You can add users to workgroups on the **Group Members** tab. (You can also add members to workgroups on the **User > Group Membership** tab.)

To add agents to a workgroup,
1. On the **Workgroup** menu, choose **Group Members**.
2. In the left pane, select the workgroup you want to configure.
3. Select names in the Non-Member list (you can use Ctrl-Click to choose multiple names).
4. Click **Add** to move those users to the Member List.
5. By default, a newly added member has the **Skill Level** set to 1. To change the Skill Level designation for a member, for this specific workgroup, select the appropriate number from the menu beside that member.

**Note:** Agents who are members of more than one workgroup can have a different skill level assigned in each workgroup.

<table>
<thead>
<tr>
<th>Group Service Level Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Threshold (seconds)</td>
<td>The length of time, in seconds, that a call or chat can be in Queue time plus Ring time before it is logged in workgroup performance statistics as having exceeded the allowable service level limits. Set this to any number between 1 - 1200.</td>
</tr>
</tbody>
</table>
| Service Level Calculation | • TSL (Total Service Level) is calculated as: TSL% = Total WG inbound within SLT / Total WG inbound. This is the default option.  
• ASL (Answered Service Level) is calculated as: ASL% = Total WG inbound answered within SLT / Total WG inbound. |
| Customize – Choose one option above the line, to be divided by the option you choose below the line | Use the check boxes to enable at least one of the following three options:  
• Answered within Service Level  
• Abandoned within Service Level  
• Overflowed/Redirected within Service level  
Divided by at least one of the following options:  
• Total Answered  
• Total Abandoned  
• Total Overflowed/Redirected |
Defining Workgroup Business Hours

Figure 36. The Workgroup > Group Members tab

To remove members from workgroups,
1. On the Group Members tab, in the left pane, select the workgroup.
2. Click the names in the Member List (you can use Ctrl-Click to choose multiple names).
3. Click Remove to move them to the Non-Member list.

On this tab, you can also log agents in and out of this workgroup.
1. Select the agent in the Member List.
2. If the member is currently logged in, click Logout to log the member out of this workgroup. If the agent is in a call, chat, or a conference, the call or chat will not be dropped by this action.
   Likewise, you can select a member and click Login to log the agent into this workgroup (this applies for all states except the Offline state).

Setting Login Rules For System Restarts

To configure login rules for workgroup agents when the system restarts,
1. On the Group Members tab, in the Name panel, select the workgroup.
2. Select the appropriate rule from the “When system is restarted, group members” options:
   • Keep Login Status – All members retain their original login status for that workgroup prior to restart (default setting).
   • All Logout – All members are logged out of the workgroup when the system is restarted.

Defining Workgroup Business Hours

You can assign a Business Hours profile to a workgroup, and also configure after-hours handling for each day of the week.

Here is how the system’s general Work Hours settings compare with the Workgroup Business Hours settings:
• URI routing rules and Caller ID routing rules use the System Business Hours profile settings (found on the Work Hours menu) to determine whether a call has arrived during business hours, outside of business hours, or on a non-workday.
Workgroup Business rules are used only for routing calls to each specific workgroup.

To configure standard business hours for a workgroup,
1. On the Workgroup tab, choose Business Hours.
2. In the Name panel, select the workgroup you want to configure.
3. In the top pull-down menu, specify which System Business Hours profile this workgroup follows.

4. Set the non-workhours options as appropriate, for each day of the week. The options vary depending upon the media type of the workgroup (voice or chat).

<table>
<thead>
<tr>
<th>Business Hours field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Workhours Handling</td>
<td>For each day of the week, select a Forward To option for call handling after hours or for non-workdays. See Session Handling Options on page 49 for descriptions of each option.</td>
</tr>
</tbody>
</table>
Configuring Skill-Based Routing

You can set up skill-based routing to more closely match an incoming call or chat session to an agent who has the skills needed to handle that customer's issue. Skill-based routing can increase customer issue resolution on the first call, lower the abandoned call rate, and in turn increase customer satisfaction. You can define up to nine different levels of skill per workgroup.

In Release 7.0, workgroups can now have up to 20 skill levels.

Skill number 1 could be defined as the most basic skill, and level 20 the most advanced, or vice versa. Or the skill numbers can be used in any other way that works for the way your company does business.

Skill levels are used in various rules within MaxACD, including:

- In IVR routing
- In URI routing
- In Caller ID routing
- In workgroup call routing
- In Advanced Call Router – You can define skill levels in rules

Skills are workgroup-specific; in other words, each group can have its own custom set of skills.

<table>
<thead>
<tr>
<th>Business Hours field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Logout All Agents at</td>
<td>For each day of the week, you can configure up to three scheduled times to automatically log all agents out of this workgroup.</td>
</tr>
<tr>
<td></td>
<td>Times are based on the time at the MaxACD server. Keep this in mind if workgroup members are located in different time zones.</td>
</tr>
<tr>
<td></td>
<td>Times are in 24-hour format; in other words, to indicate one o’clock in the afternoon, use 13:00.</td>
</tr>
<tr>
<td></td>
<td>To indicate a time of day, use whichever method you find the easiest:</td>
</tr>
<tr>
<td></td>
<td>• Type the time (for example, type 12:00 to indicate that the system should log out all members at twelve o’clock noon)</td>
</tr>
<tr>
<td></td>
<td>• Click an up or down arrow button to adjust the time incrementally</td>
</tr>
<tr>
<td></td>
<td>• Click and HOLD an arrow button to speed quickly to a different time.</td>
</tr>
</tbody>
</table>

Figure 39. The Workgroup > Skill-Based Routing tab
After skill numbers have been defined on this tab, each agent in the workgroup should be assigned a skill number, according to that agent’s knowledge and ability, on the Group Members tab.

You can set rules on the Skill Based Routing tab to allow calls or chat sessions coming into a workgroup to be handled by agents with a lower skill number or a higher skill number than is set for a call or chat. And you can set time-based rules that alter the call or chat’s SKLR to allow either less able agents or over-qualified agents to handle it, so that the call or chat does not have to wait for an excessive period of time.

**Note:** For the settings configured on the Skill Based Routing tab to take effect, you must select the **Skill-Based Routing** option on the Session Handling tab.

To define skills for a workgroup,

1. On the Workgroup menu, choose **Skill-based Routing**.
2. In the left panel, choose the workgroup that you want to configure.
3. Enter names for each skill in the **Skill Level Definition** pane, up to twenty skills.
4. Customize the routing parameters as desired.

<table>
<thead>
<tr>
<th>Skill-based Routing field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal or Lower than Inbound SKLR</td>
<td>Any agent whose skill number is equal to or lower than the SKLR of the incoming call or chat may handle this call. Agents with the lowest skill number are rung first. With this option, that would be agents whose skill number is 1. Set the SKLR as if you were setting a ceiling on the resources you are willing to use for this type of call or chat. For example, you can set a regular call or chat’s SKLR to 1 and a preferred customer's SKLR to 3. Calls or chats from preferred customers can be answered by agents with skill level 3, 2, and 1 while regular calls can only be handled by agents with lower skill levels.</td>
</tr>
<tr>
<td>Equal or Higher than Inbound SKLR</td>
<td>Any agent whose skill number is equal to or higher than the SKLR of the incoming call or chat may handle this call. Agents with the lowest skill number are rung first. With this option, that would be agents whose skill number matches the SKLR. Set the SKLR as if you were setting a minimum skill level requirement for the call or chat. For example, say a technical support group has agents with skill level 1 (beginner), 2 (intermediate), and 3 (expert). If you select the “Equal or Higher” option, calls or chats with SKLR 2 will be queued for an agent with skill level 2 or 3.</td>
</tr>
<tr>
<td>Exact Match Inbound SKLR</td>
<td>Only agents whose skill number matches the incoming SKLR can answer the call. For example, suppose that you have three calls or chats with SKLR 2 in the queue. All agents with skill level 2 are busy, and there are agents with skill level 1 and 3 who are idle. With this option, the system will keep those customers in queue waiting for an agent with skill level 2 to be available, instead of assigning an agent with skill level 1 or 3.</td>
</tr>
<tr>
<td>Enable Escalation Direction</td>
<td>Enables escalation, either higher or lower, based upon which escalation direction you chose. This checkbox is not available if you choose the “Exact Match…” option. This option allows you to set an escalation waiting time.</td>
</tr>
<tr>
<td>Waiting Time (seconds)</td>
<td>These settings, one for each skill level, help ensure that the workgroup is handling customers in a timely manner. For each level, specify the number of seconds a call or chat can be in the queue before the system will include the next level (up or down) of agents in the pool of agents who may handle the call. Enter a value from 1-999.</td>
</tr>
</tbody>
</table>
Configuring Session Handling Options

In various places within the Administrator Portal you can choose forwarding options. For example, there are forwarding options for when the target agent is busy, for when the agent does not answer, and so on.

The Workgroup > Session Handling Options tab is where you configure busy handling options, no-answer options, and related voice call and chat session handling behavior.

The following table describes each handling option that is available; not all options will appear on all menus. Several options are not available for chat workgroups, including the IVR and voicemail options.

<table>
<thead>
<tr>
<th>Session Handling Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Next Group Member</td>
<td>Routes calls or chats to the next available member in the workgroup, until all available agents have been tried. If all agents are busy, the call or chat will stay in the workgroup queue.</td>
</tr>
<tr>
<td>Group Queue</td>
<td>Routes calls or chats to the queue for this workgroup.</td>
</tr>
<tr>
<td>Group</td>
<td>Routes calls or chats to the workgroup that you choose.</td>
</tr>
<tr>
<td>IVR</td>
<td>Routes calls or chats to the IVR tree that you choose.</td>
</tr>
<tr>
<td>Group Voicemail</td>
<td>Routes calls to the voicemail mailbox of this workgroup.</td>
</tr>
<tr>
<td>User Voicemail</td>
<td>Routes calls to the voicemail mailbox of the Lync user you choose.</td>
</tr>
<tr>
<td>You can either type the SIP address or click the small adjacent button to search for the appropriate user.</td>
<td></td>
</tr>
<tr>
<td>SIP URI</td>
<td>Sends calls to the SIP URI of the user you choose. You can either type the SIP address or click the small adjacent button to search for the appropriate user.</td>
</tr>
<tr>
<td>Outside Number</td>
<td>Sends calls to an outside number.</td>
</tr>
</tbody>
</table>

*Figure 40. Busy Handling and No Answer Handling options*

**Forwarding to Outside Numbers**

This feature applies to only voice workgroups. It does not apply to chat workgroups.

When an outcall is made by the system (for Message Notification, Call Forwarding, and so on) to a cellular or PCS phone, it may ring the phone once but not necessarily present the call and make a connection. This will happen if the ringback tone played by the cellular service provider does not conform to standard ringback tones. To work around this problem, append a few commas (,) to the outcall (cellular) number when entering it. Each comma provides a one-second pause.
Configuring Busy Handling Options

You can configure how calls and chat sessions are handled when agents are busy. If you do not enable busy handling options, for voice workgroups, the caller simply hears a busy signal.

To configure how chats and calls are handled when agents are busy,
1. On the **Workgroup** menu, choose **Session Handling**.
2. In the **Name** panel, choose the workgroup that you want to configure.
3. In the Busy Handling section, select the **Enable Busy Handling** option.
4. Configure the options for that workgroup as appropriate. Refer to the section *Configuring Session Handling Options* on page 49 for descriptions of the options.

**Note:** When forwarding calls to a DID number, if you enter a DID that belongs to a workgroup in another MaxACD server, then calls will be forwarded to IVR.

Configuring Forwarding

To forward all calls or chat sessions for a workgroup,
1. On the **Workgroup** menu, choose **Session Handling**.
2. In the **Name** panel, choose the workgroup that you want to configure.

![Forwarding Options](image)

**Figure 41.** Workgroup Forwarding Options

3. In the Forward All section, choose how you want calls or chats forwarded. See the table in *Session Handling Options* on page 49 for a description of each option.

**Note:** When forwarding calls to a DID number, if you enter a DID that belongs to a workgroup in another MaxACD server, then calls will be forwarded to IVR.

Configuring Intra-Group Distribution

The IntraGroup Call Distribution options let you control how to route normal inbound calls and chats to a workgroup agent.

To customize how calls are distributed within each workgroup,
1. On the **Workgroup** menu, choose **Session Handling**.
2. In the **Name** panel, choose the workgroup that you want to configure.
3. In the Intra-Group Distribution section, choose the appropriate behavior.

<table>
<thead>
<tr>
<th>Intra-Group Distribution Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>First Available Member</td>
<td>Routes to the first available extension in a workgroup. For example, if there are three member extensions in a workgroup, the call or chat will always sent to the first member configured in the workgroup. If this member is busy, the call goes to the second member configured, and so forth.</td>
</tr>
<tr>
<td>Next Available Member</td>
<td>The system uses a round-robin method that attempts to evenly distribute calls or chats among the group members. This method sends the call or chat to the next member configured in a workgroup (regardless of whether the previous member is busy or not). In other words, if the previous call or chat was sent to #3 in the group, the present one will be sent to #4, if #4 is not busy.</td>
</tr>
<tr>
<td>All Available Members</td>
<td>This option is not supported for chat workgroups. Routes calls to all extensions in a workgroup. <strong>Note:</strong> When this option is enabled, a single workgroup can have no more than 20 members. In addition, calls to the workgroup with this option enabled have higher priority than other workgroup calls. Therefore, if an agent belongs to multiple workgroups, one of which has this option enabled, a call to that workgroup will be processed first, regardless of Wait Time of calls in other workgroups which are not set to Ring All. If members are using IP extensions, the system will not use the IP codec channel during ringing all IP phones. Only one codec will be used when a member of a workgroup answers the call. With this option, you can configure the number of seconds before processing (in the No Answer Handling section).</td>
</tr>
</tbody>
</table>
| Longest Idle Member              | Routes to the agent who has the longest idle time, defined as follows:  
  • The agent needs to be logged in.  
  • Idle time is calculated from the end of the last wrap-up event.  
  • If the agent does not have wrap-up time configured, idle time is calculated from the end of last busy state. |
Chapter 6: Configuring Workgroups

Configuring No-Answer Handling

You can customize how the system handles calls and chats for a workgroup when the agent does not answer.

**Note:** The “Enable No Answer Handling” options will not be available if Intra Group Distribution is set to “All Available Members.”

To customize how an inbound call or chat to will be handled if it is not answered,

1. On the **Workgroup** menu, choose **Session Handling**.
2. In the **Name** panel, choose the workgroup that you want to configure.

### Intra-Group Distribution Option

<table>
<thead>
<tr>
<th>Intra-Group Distribution Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Average Longest Idle Member     | Routes to the agent who averages being off the phone the longest:  
  • Average Idle Time = (Total Login Time - Total Talk Time) / Total Handled  
  • Total Login Time = Cumulative WG login time since midnight  
  • Total Talk Time = Cumulative WG Inbound + Outbound duration since midnight  
  • Total Handled = Total number of WG calls / chats (Inbound + Outbound) handled by the agent since midnight  
  If a new agent logs into a workgroup that has been operating for several hours, this agent will have the highest priority to take the next call or chat.  
  If multiple agents log into a workgroup that has been operating for several hours, the one with the longest idle time since logging will have the highest priority to take the next call or chat. |
| Fewest Answered                 | Routes to the agent who has answered the fewest number of calls or chats. |
| Shortest Average Talk Time      | Routes to the agent who averages the shortest talk time.  
  Average talk time is calculated as follows:  
  Average Talk Time (ATT) = Total Inbound Talk Time / Total Inbound Answered |
| Skill-Based Routing             | Routes the call or chat session according to the SKLR setting and skill-based routing rules. The agent with longest idle time will be selected when multiple agents with the same skill level are idle. |

### Configuring No-Answer Handling

You can customize how the system handles calls and chats for a workgroup when the agent does not answer.

**Note:** The “Enable No Answer Handling” options will not be available if Intra Group Distribution is set to “All Available Members.”

To customize how an inbound call or chat to will be handled if it is not answered,

1. On the **Workgroup** menu, choose **Session Handling**.
2. In the **Name** panel, choose the workgroup that you want to configure.
3. Check the “Enable No Answer Handling” checkbox and choose the desired behavior.

<table>
<thead>
<tr>
<th>No Answer Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable No-answer handling</td>
<td>Enables the selected handling rule. See Session Handling Options on page 49 for descriptions of the options.</td>
</tr>
<tr>
<td>Set RNA Agent log out</td>
<td>If the agent does not answer, log the agent out of this workgroup.</td>
</tr>
<tr>
<td>Set RNA Agent to Not Ready</td>
<td>If the agent does not answer, set the agent’s status to Not Ready.</td>
</tr>
<tr>
<td>Number of Seconds before handling</td>
<td>The number of seconds to wait before handling the unanswered call.</td>
</tr>
<tr>
<td></td>
<td>This setting only applies when the Intra Group Call Distribution option for this workgroup is set to All Available Members.</td>
</tr>
<tr>
<td></td>
<td>This setting does not apply to chat workgroups.</td>
</tr>
</tbody>
</table>

**Configuring Group Ring No Answer/Logout Handling**

To configure how to handle calls and chat sessions when all agents are unavailable,

1. On the Workgroup menu, choose Session Handling.
2. In the Name panel, choose the workgroup that you want to configure.
3. In the Group RNA/Logout Handling section, select the Forward to option.
4. Configure the desired forwarding behavior (see Configuring Session Handling Options on page 49 for descriptions of the options).

![Workgroup RNA / Logout Handling options](image)

**Configuring Announcements to Play/Display Before Connecting**

You must have phrases that have already been recorded (or written) prior to assigning them to workgroups. For instructions on recording and managing phrases, see Phrase Management - Voice on page 82.

You have several options for playing/displaying workgroup announcements or agent introductions before a customer connects with an agent.

For voice calls, both the agent and the caller can hear the announcement. For chat sessions, both agent and customer/associate can see the phrase in the chat window.

You enable or disable announcement for each workgroup by choosing Workgroup > Session Handling tab, and checking the Enable Answer Announcement option.

To configure announcements,

1. On the Workgroup menu, choose Session Handling.
2. In the Name panel, choose the workgroup that you want to configure.
3. In the Workgroup Announcement section, check the **Enable Answer Announcement** option and select the appropriate phrase from the list. See *Uploading Voice and Chat Phrases* on page 83 for additional information.

4. If you prefer to play/display the agent's custom answer announcement, also check the **Use Personalized Agent Announcement instead if available** option. If the answering agent has no custom announcement configured and enabled, then the workgroup announcement will play. See *Configuring Personal Answer Announcements* on page 33 for instructions on configuring agent announcements.

![Workgroup Announcement](image)

*Figure 45. Workgroup announcement options*

5. For chat workgroups, you can also specify a disconnect phrase; check the **Disconnect Announcement** option and choose the appropriate phrase.

### Configuring Inter-Workgroup Distribution

If an agent belongs to multiple workgroups and there are queued calls or chats in two or more of these groups, as soon as the agent becomes available, the queued call or chat that will be distributed to this agent is determined by the “Inter Workgroup Distribution” setting.

This setting is used to calculate the score of each call or chat in the queue. Depending on the call or chat’s assigned priority and the skill of the agent that is available, the score will determine which call or chat gets answered first. The one with the highest score is answered first. You can increase or decrease the weight values for **Priority** and **Skill** values.

The first option is the weight for agent skill in a workgroup. The second option is the weight for priority of a queued call or chat. The score is calculated as 

\[(21 - \text{skill level}) \times \text{weight for agent skill} + (21 - \text{queued call/chat priority}) \times \text{weight for call/chat priority}\]

When determining which call/chat should be dispatched to an idle agent who is assigned to multiple workgroups, the system will consider the following factors:

- Call/chat's priority
- Agent's skill level
- Call/chat's SKLR
- Call/chat's wait time in queue

![Inter Workgroup Distribution](image)

*Figure 46. Workgroup Inter-Workgroup Distribution options*

Following are some guidelines for configuring this setting:

- Assuming an agent is assigned with different skill levels for different workgroups, and priority is the same for all calls/chats, you can increase the skill weight to 9 and reduce the priority weight to 1 to better match an agent's skill.
• Assuming each call/chat is assigned with a priority based on certain customer attributes, and an agent's skill is the same for all workgroups, you can increase the priority weight to 9 and lower the skill weight to 1 to have a call/chat with higher priority answered first.

• Assuming all call/chats' priority is the same and an agent's skill level is the same for all workgroups, you can use this scoring system to prioritize workgroups. For example, assign priority weight 9 to the most important group, 5 to the second most important group, and 1 to the least important group. Calls/chats in the group with higher priority weight will be dispatched first.

• When there are calls/chats with the same score in different workgroups, the queue time will be used as a tie breaker.

• If you have variable priority settings for calls/chat, and agents belong to multiple workgroups with different skill levels, it is recommend that you set all call/chats SKLR to 1 and set the coverage rule to “Equal or Lower than Incoming SKLR”. This will eliminate the complexity of matching the incoming SKLR to an agent's skill level.

**Outbound Workgroup Options**

In MaxACD 7.0, workgroup agents can choose from a list of campaign-based Caller IDs to display when making outbound workgroup calls.

The administrator or the Workgroup supervisor can configure a list of Caller IDs for a workgroup. The agent then selects from the Campaign Caller ID list when logging into an outbound workgroup. Afterwards, all the out-bound workgroup PSTN calls made by this agent will display the selected Caller ID.

**Configure Campaign Caller ID**

Administrators and Workgroup supervisors can configure this list on the Workgroup > Session Handling tab.

To configure the list,

1. On the Session Handling tab, choose the user in the left panel.
2. Click the button in the Outbound Workgroup section beside Campaign Caller ID.

*Figure 47. The Outbound Workgroup options*

You will see a list of any campaigns that have already been configured.
Chapter 6: Configuring Workgroups

Figure 48. The workgroup Campaign Caller ID table

3. To add a new campaign, click Add Campaign Caller ID, then enter a descriptive name, the caller ID that will be associated with that name, a caller name that will be associated with the campaign, and the SIP URI.

   Note: Only digits are supported in the Caller ID field; do not enter dashes or any other characters.

To update a campaign, click the Edit button beside it.

If you need to delete a campaign, click the Delete button beside it.

How Agents Use Campaign Caller ID

When agents log into MaxAgent, they are presented with a Workgroup login screen. There, agents select an outbound workgroup.

Once they select the outbound workgroup, the Campaign Caller IDs that have been configured for that workgroup are available from the list. Agents choose a Campaign name from the list.

Figure 49. Agents choose a Campaign Caller ID when they log into the workgroup

When the agent makes an outbound workgroup PSTN call, MaxACD sends the selected Campaign Caller ID to the Lync/Skype for Business Server. Note that the caller ID may not be delivered to the remote end device if the gateway and/or the carrier involved blocks it.
Administrators and Workgroup supervisors must enable the Allow **Agent to Change Outbound Workgroup** option (on the **Workgroup > Group Membership** tab) in order to enable the Campaign caller ID feature.

![Outbound Workgroup Screen](image1)

**Figure 50. Outbound workgroup option**

If an administrator or Workgroup supervisor changes or deletes the Campaign Caller ID being used by an agent, the Campaign Caller ID setting for the agent is reset to N/A. In addition, if MaxAgent is running at the time of the deletion or change, MaxAgent will show the agent a warning panel that allows the agent to choose a new Campaign caller ID.

**Caller ID Precedence**

Following is the precedence for the Caller ID that is sent for the outbound call:

1. The Campaign Caller ID is set, if it has been configured.
2. If no Campaign Caller ID has been chosen, the User Caller ID will be sent.
3. If no agent Caller ID was chosen, the agent's Line URI will be sent.
4. If none of the previous options were chosen, the System Main Number will be sent.

**Configuring Queue Options**

The Queue tab allows you to set options for queue phrases, announcements, and overflow handling.

![Queue Options Screen](image2)

**Figure 51. The Workgroup > Queue tab**
Assigning Queue Phrases

For each workgroup, you can either use the system default phrases or you can use custom phrases. You can use the default phrases provided, or create custom phrases; for instructions on recording and managing phrases, see Phrase Management - Voice on page 82.

To assign phrases for the workgroup’s call queue,
1. On the Workgroup menu, choose Queue.
2. In the Name panel, choose the workgroup that you want to configure.
3. For chat workgroups, you can selecting a phrase for a greeting from the Greeting list.
4. To use custom phrases, select the “Use Custom Phrase” checkbox. To use system phrases, clear the checkbox.

![Figure 52. Workgroup Queue Phrase options](image)

5. For phrases 1 through 5, choose which phrase to use, in order, to play to callers in the queue.
6. Select an Update Interval (0 to 180 seconds); this is a delay before the system plays the next phrase. If you set the interval to 0, the system will play phrases one after the other, without music in between.

Configuring Queue Announcements

You can set up the system to announce the queue status – the queue position and the calculated queue time – when a call or chat enters the workgroup queue.

To enable and configure queue announcements,
1. On the Workgroup menu, choose Queue.
2. In the Name panel, choose the workgroup that you want to configure.

![Figure 53. Workgroup Queue Announcement options](image)
3. Check the **Enable Announcement** option, then choose the appropriate settings.

<table>
<thead>
<tr>
<th>Queue Announcement Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Queue Position            | The system will inform customers of their position in the queue.  
  • Do not check this option if you assign different priorities to different calls/chats based upon DNIS, CID, or IVR selection  
  • Do not check this option if you configure matching an incoming SKLR to an agent’s skill level. Queue position is not meaningful when a higher priority call/chat can push a lower priority one, or if no agent is available to answer a particular SKLR. |
| Expected Queue Time       | The system will inform the customer how long the wait is expected to be. When calculating this number, the system will consider the average agent handling time and the position of the customer in the queue. Because queue position is a factor when calculating this number, do not check this option when call/chat priority and caller SKLR matching are configured. |
| Initial Expected Wait Time| The number of minutes the system calculates the customer will wait when they first enter the queue. See **Expected Wait Time Sampling** on page 59. |
| Initial Sample Count      | The number of calls/chats that you want the system to use in the initial samples for the expected wait time. |

**Expected Wait Time Sampling**

Expected Queue Time is an estimated number. Agents logging in or out of the workgroup during operation hours will affect the actual handling time and cause deviation to the expected queue time.

Expected Queue Time is calculated as follows:

\[ \text{Expected Queue Time (round up to minutes)} = \frac{[\text{Average Handling Time } \times \text{ Queue Position} \times 59 \text{ sec}]}{60 \text{ sec}} \]

To calculate Expected Queue Time, the system needs to take samples when a workgroup starts operation. You can set the following parameters to set a sampling period and a fixed Expected Queue Time announcement during this sampling period. The expected queue time counter is reset for all workgroups daily at midnight.

- Initial Expected Wait (Queue) Time [1 to 10 minutes] – This field defines the expected queue time to be announced during the sampling period.
- Initial Sample Call Count [1 to 100] – How many calls/chats you would like to use as initial samples.

**Configuring Queue Overflow Forwarding**

The Overflow options are for handling long queues or long wait times.

When a queue exceeds a set number of calls/chats, or when customers are waiting beyond a set length of time, calls/chats can be automatically forwarded.

To set options for handling queue overflow,

1. On the Workgroup menu, choose Queue.
2. In the Name panel, choose the workgroup that you want to configure.
3. Select the **Enable Queue Overflow Forwarding** option.
4. Set the appropriate forwarding options; see Configuring Busy Handling Options on page 50 for descriptions of the overflow options.

<table>
<thead>
<tr>
<th>Queue Overflow Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Overflow existing session in the queue to</td>
<td>Forwards existing overflow calls/chats to the destination you specify; first in, first out.</td>
</tr>
<tr>
<td>Overflow new incoming session to</td>
<td>Forwards new inbound calls/chats to the destination you specify; last in, first out.</td>
</tr>
<tr>
<td>Queue Length Exceeds</td>
<td>When the number of calls/chats in the queue is greater than the defined number, new incoming calls/chats will overflow to the defined target. Enter a value between 0 and 150.</td>
</tr>
<tr>
<td>Longest Wait time longer than ___ minute(s)</td>
<td>When the longest queue time is greater than the specified number of minutes, new incoming calls/chat will overflow to the defined target. Enter a value between 0 and 200 minutes.</td>
</tr>
<tr>
<td>Service level lower than ___ %</td>
<td>When the service level is below the specified percentage, calls/chats will be overflowed to the defined target. Enter a value between 0 and 100%. The service level is a real-time queue service level (RTSL), which is calculated as: ( \text{RTSL} % = 1 - \frac{\text{# of queued calls/chats exceed SL threshold}}{\text{Total in queue}} )</td>
</tr>
</tbody>
</table>

Allowing Supervisors to Manage the Queue

For a discussion of workgroup supervisors and their privileges, refer to Configuring Admin Users on page 95.

To allow a supervisor to adjust the queue, select the Allow Redirect Call/Change Priority option. This allows a workgroup supervisor to redirect queued calls/chats or change their priority, using the MaxSupervisor client application.

Figure 54. Workgroup Queue Supervisor options

To prevent calls with lower priority from staying in queue forever, causing high abandon rate, or lowering service level, you can set priority promotion to enhance a caller’s position in queue. Select the “Promote priority by 1 for every...seconds” checkbox and enter the desired time interval, in seconds.

Configuring Queue IVR Responses

This feature applies only to voice workgroups; it does not apply to chat workgroups.

The In Queue IVR tab is where you can configure phrases that can be played to callers in workgroup queues. Callers will hear the menu choices, and can then press keys on their phones to respond. You can configure what actions the system will take, or what further phrases should play, for the various digits the user presses in response.

MaxACD comes with a set of default phrases. If you choose to use custom phrases, you will need to record them. See the discussions in Phrase Management - Voice on page 82.
Configuring Workgroup Recording

To set up the menus and responses,

1. On the Workgroup menu, choose In Queue IVR.
2. In the Name panel, choose the workgroup that you want to configure.
3. In the Digits field, select 0 - 9, # or *. For that digit, you will see the phrases currently in the Play List and those in the Available Phrases list.
4. To configure one or more phrases that the system should play when the caller presses this digit, choose a phrase in the Available Phrases list and click Add. To remove a phrase from the Play List, choose it and click Remove. If you want to change the order of the phrases in the Play List, select a phrase and click the Up or Down button.
5. Use the Action list to indicate which action should be performed after the phrases have been played.

Configuring Workgroup Recording

Recording only applies to voice workgroups; recording cannot be enabled for chat workgroups.

Before you can enable workgroup recording to a centralized location, system recording must be enabled. This is done on the System > Call Recording tab, by an administrator.
Figure 56. The Workgroup > Call Recording tab

For each workgroup in the table, you can enable/disable centralized recording, and specify what percentage of calls to record (n out of ten; choosing zero will record no calls).

To establish call recording options for a workgroup,

1. On the Workgroup menu, choose Call Recording.
2. In the Name panel, select the workgroup that you want to configure.
3. In the pulldown menu, choose the appropriate recording option.
4. Configure the options as desired.

<table>
<thead>
<tr>
<th>Workgroup Recording Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disable</td>
<td>Disables call recording for this workgroup.</td>
</tr>
<tr>
<td>Auto record to central location</td>
<td>Records all workgroup inbound and outbound calls, which are saved to a central location (which is defined on the Recording tab of the System menu). This option requires that a Recording Seat license is assigned to each workgroup member. You can control which workgroup members can record calls; select the member’s name, choose <strong>Enable</strong> or <strong>Disable</strong> for that member, and then specify how many calls (out of 10) to record.</td>
</tr>
<tr>
<td>Record on demand to central location</td>
<td>Records calls on demand; recordings are saved to a central location (which is defined on the Recording tab of the System menu). This option requires that a Recording Seat license is assigned to each workgroup member.</td>
</tr>
</tbody>
</table>
Call Recording after Transfers

In earlier releases of MaxACD, workgroup call recording stopped after the call was transferred. In MaxACD 7.0, recording after an ad-hoc transfer can continue if some specific requirements are met.

An “ad-hoc transfer” occurs when an agent invites another agent to the conference bridge and then hangs up the call. The customer and the newly-added agent then continue to talk on the conference bridge.

If the invited agent is a Lync/Skype for Business user who has been configured in MaxACD, then call recording will continue after the original agent disconnects from the call. Otherwise, call recording stops.

Configuring Voicemail Notifications

The notification feature applies to voice workgroups only; it does not apply to chat workgroups.

You can have MaxACD send notifications when a workgroup voicemail message arrives. Notifications can be sent to a PSTN phone number or to a SIP URI; they cannot be sent to an IVR or workgroup. The call is routed the workgroup mailbox on the Exchange Server. The user can then enter the mailbox password to access the voice message.

In Release 7.0, either a phone number or a SIP URI can be configured as the message notification target.

To configure voicemail notifications,

1. On the Workgroup menu, choose Notification.
2. In the Names panel, choose the workgroup you want to configure.
3. Configure the options as desired.
Figure 58. The Workgroup > Notification tab

<table>
<thead>
<tr>
<th>Notification Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Message Notification</td>
<td>• None – Agents are not notified of new workgroup messages.</td>
</tr>
<tr>
<td></td>
<td>• High Importance – Agents are notified only of workgroup voicemail messages that were marked as Urgent.</td>
</tr>
<tr>
<td></td>
<td>• All Voice Messages – Agents receive notifications for all workgroup messages.</td>
</tr>
<tr>
<td>Notification Destination</td>
<td>• Phone – The phone number to ring with the notification.</td>
</tr>
<tr>
<td></td>
<td>• SIP URI – The SIP URI address to ring with the notification. You can type the address or click the button to search.</td>
</tr>
<tr>
<td>Play Message</td>
<td>• Seconds after answered – This field is set to 0 seconds and it is not configurable for notification to a phone number. The system will play the announcement immediately after answer supervision is received.</td>
</tr>
<tr>
<td>Schedule</td>
<td>• Non-business hours – Notifications are sent during non-business hours.</td>
</tr>
<tr>
<td></td>
<td>• From / To – Notifications are sent between the hours you specify.</td>
</tr>
<tr>
<td></td>
<td>• Any Time – Notifications are sent at all times.</td>
</tr>
</tbody>
</table>

Configuring Notification Timing

When notification is configured to an outside phone number, the system will announce, “This is the outcall notification message for…” after call connection. However, there are situations when the system may not be able to receive an answer supervision signal from the carrier. If the system plays the announcement phrase before the notification call is answered, the phrase will be cut off.

You may need to adjust the delay setting to make sure the user return number is transmitted properly.
Multilingual Configuration

MaxACD 7.0 supports multiple language prompts. Within the MaxACD Administrator Portal, you will see language fields on various pages.

- On the Admin > URI Routing tab, you can configure MaxACD to direct a caller to prompts in a selected language based on the phone number the caller has dialed. See Configuring Inbound Routing on page 69.
- On the Admin > Caller ID Routing tab, you can configure MaxACD to direct a caller to prompts in a selected language, based upon the Caller ID of the incoming call. See Configuring Caller ID Routing on page 72.
- On the System > Multi-Lingual tab, you see the languages that you have currently available in MaxACD. On this tab, you can edit the language names, as they appear within MaxACD Admin.
- On the IVR > Multi-Lingual tab, you can enable multi-lingual support in your IVR system. See Enabling Multilingual for IVR Systems on page 81.

This section covers the following topics:

- About Multi-Lingual Support on page 65
- Configuration Overview on page 66
- About Language Phrase Packages on page 66
- The Language Packages Configuration Tool on page 67
- Initial Language Installation on page 67
- Uninstalling Language Files on page 67
- Which Language Will Be Used? on page 67

About Multi-Lingual Support

- Multi-lingual IVR is not supported for Chat workgroups.
- By default, the MaxACD installation package includes English phrases. Other language require special packages that contain phrases, number rules, and time rules.
- MaxACD supports multiple language prompts (8 languages maximum), letting you configure your system to handle the following types of scenarios in a multilingual environment:
  - An IVR set may serve callers who speak different languages. MaxACD can be configured to let the caller select a preferred language in which to hear prompts. Once a language is selected, the whole call session will use the selected language.
Inbound routing rules may also be created to pre-set a language for the caller. If your company has multiple phone numbers, you can configure MaxACD to direct a caller to a language based on the phone number the caller has dialed. For example, if you give out different phone numbers to different countries, and a call comes in from the phone number you give out to customers in Mexico, you can configure MaxACD to direct that phone number to the “Mexico Spanish” language prompts or to an extension that uses the corresponding language in its prompts.

**Note:** The Dial-by-name and Directory services only support English.

### Configuration Overview

Configuring multilingual features involves the following actions:

1. Have the appropriate system and custom phrases recorded in each language that your company wants to use (in addition to the installed languages).
2. Use AltiGen’s configuration tool to add the new languages to MaxACD. See the section *The Language Packages Configuration Tool* on page 67.
3. Enable IVR language support in the IVR > Multilingual tab. See the section *Enabling Multilingual for IVR Systems* on page 81.
4. Configure the Language settings in URI routing and Caller ID routing, if desired.

### About Language Phrase Packages

For each set of phrases you want in a different language, you need to have phrases recorded in that language. Each language’s phrase package must contain phrase files and two text files: one that lists syntax rules for numbers, and one text file that lists syntax rules for sentence structure (these vary from language to language).

The phrase files will have the exact same name/number as in the default language directory and will be part of the same IVR set, but they will be stored in a different directory.

### Directory Structure for Language Phrase Packages

If language phrases are added after system startup, MaxACD needs to be shut down and restarted, so that the directories are recognized. The next figure illustrates the folder structure for language phrases.

![Diagram of directory structure](image)

*Figure 59. Directory structure for multilingual phrase packages*

- The **Music** directory is for all languages.
- The **Lang1** and **LangCustom** directories contain the phrases for the system default language.
The Language Packages Configuration Tool

AltiGen provides a tool, the Languages Packages Configuration Tool, to install additional languages. This tool uploads language phrase files into MaxACD. You must upload both system phrases and custom phrases (custom phrases are optional). This tool can also reinstall and uninstall the phrase files.

For an initial language installation, the tool will insert phrase files into a table named VoiceFile into the CWSDB database. In addition, it will insert a new language record into the Language table.

![Image of Language Packages Configuration Tool](image)

**Figure 60. The Languages Packages Configuration tool**

**Initial Language Installation**

To upload a new set of language phrases,

1. Load the MaxACD 7.0 installation media.
2. In the AltiServe \ Exe folder, run CWSDBLangInstall.exe.
3. Run the setup.exe file in that folder.
4. For the System Phrases Folder field, type the path to the appropriate language folder, or click the small button to browse to the folder.
5. For the Custom Phrases Folder field, type the path to the appropriate language folder, or click the small button to browse to the folder.
6. Click Install.

**Uninstalling Language Files**

If you no longer support a language, then you can uninstall those language files. You cannot uninstall the default language.

**Note:** If you uninstall a language that is currently assigned in any IVR or routing rules, those rules will automatically reset the Language setting to the default language.

To uninstall a language,

1. Load the MaxACD 7.0 installation media.
2. In the AltiServe \ Exe folder, run CWSDBLangUninstall.exe.

**Which Language Will Be Used?**

MaxACD follows these rules to determine which language to use:

1. If there is URI routing or Caller ID routing to a multi-lingual IVR, the IVR will overwrite the initial language setting.
2. If the caller info matches both the caller ID and the URI routing, the language setting in the caller ID routing rules takes precedence.
Configuring Routing

Routing is configured on several tabs on the Admin menu.

![Admin menu tabs](image)

**Figure 61. The tabs on the Admin menu**

- The **URI Routing** tab is where you can configure inbound routing; see Configuring Inbound Routing on page 69.
- The **Caller ID Routing** tab is where you can configure rules to calls based on the incoming call’s Caller ID; see Configuring Caller ID Routing on page 72. (Caller ID routing is not supported for incoming chat sessions.)
- The **Virtual Extension** tab is where you set up virtual extensions. A virtual extension is an entity used to associate with an application. See Configuring Virtual Extensions on page 73.

**Configuring Inbound Routing**

When a PSTN call or chat session comes in to a specific DID number, or when an incoming SIP call arrives for a specific SIP URI, the system can route it to the proper user, IVR, workgroup, or voicemail mailbox. In order to locate an entry in the DNIS table for an incoming call or chat, a full match is required.

On the Admin > URI Routing tab, the left URI panel shows any routing entries that have already been configured. The pane on the right shows the configuration of the selected routing entry.

You can add both DID and SIP numbers to your routing list.
With this release, you can add URI routing rules and specify a DID number of a SIP URI for incoming calls and forwarding targets. A PSTN incoming call made to a DID number or a SIP incoming call destined to a specific SIP URI can be routed from the Lync/Skype for Business server to the MaxACD server using Application Endpoint (AEP). Administrators may add URI Routing entries in the MaxACD server, and specify the DID number or SIP URI for incoming calls and its forwarding target, an IVR, a Workgroup, a SIP URI, or a voicemail.

Administrators can also choose to display a SIP URI AEP as a contact which can be searched and added by Lync/Skype for Business clients. When a Lync/Skype for Business client calls this AEP contact, the call is routed to MaxACD's URI Routing engine, and is forwarded to the configured target.

Within the Administrator portal, there are many places where you can route a call or chat to a SIP URI. For convenience, you can either type the entry or click the small button beside the field to search for the appropriate user.

**Creating URI Routing Rules**

To add entries to the URI routing table,
1. On the **Admin** menu, choose **URI Routing**.
2. Click **Add**.
3. Configure the URI details for this routing entry.

<table>
<thead>
<tr>
<th>URI Routing Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>A unique name for this routing entry.</td>
</tr>
<tr>
<td>Media Type</td>
<td>Choose either Voice or Chat.</td>
</tr>
</tbody>
</table>
4. Configure time-based rules for this entry. You can customize the routing for three distinct time periods of time, as defined in the Business Hours tab:

- Workdays During Business Hours
- Workdays Outside of Business Hours
- Non-Workdays

<table>
<thead>
<tr>
<th>Time-based Routing Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route to Workgroup</td>
<td>Routes calls/chats to the workgroup that you select. The list will include workgroups of the same media as this workgroup (voice or chat).</td>
</tr>
<tr>
<td>Route to IVR</td>
<td>Routes calls to the IVR prompt that you select.</td>
</tr>
<tr>
<td>Route to SIP URI</td>
<td>Routes calls to a SIP URI address. Either type the name or click the small button to search for the desired user.</td>
</tr>
<tr>
<td>Route to Voicemail</td>
<td>Routes calls to voicemail for the user that you select. Either type the name or click the small button to search for the desired user. This option is available only for voice workgroups. It is not enabled for chat workgroups.</td>
</tr>
</tbody>
</table>

5. You can further customize each routing rule.
Chapter 8: Configuring Routing

To edit a routing entry, select the entry in the URI panel, make your changes, and then click **Ok**.
To delete an entry, select it in the URI panel and click **Delete**.

### Configuring Caller ID Routing

Caller ID routing is not supported for chat workgroups.

When an incoming call comes through with a Caller ID, MaxACD can route the call to the proper user, to the appropriate IVR, or to a workgroup, based upon the Caller ID number collected.

**Note:** You will want to set up Lync users, workgroups, Business Hours and Holidays before you configure Caller ID routing.

### How MaxACD Routes Incoming Calls

MaxACD follows these steps to route incoming calls:

1. MaxACD tries to match the number to an entry in the Caller ID Routing table.
2. If it does not find a match, MaxACD tries to match the DID number configured in a URI routing rule.
3. If it does not find a match, then it checks whether that day is configured as a holiday. If it is a holiday, MaxACD routes the call according to the rules in the Holiday profile assigned to the routing rule.
4. If it finds a match and today is not configured as a holiday, MaxACD routes the call according to the rules in the business hours profile assigned to the routing rule.
The Caller ID Routing Tab

The Caller ID Routing tab is where you will configure routing rules for incoming caller ID numbers; open it by choosing **Caller ID Routing** from the Admin tab.

![Admin > Caller ID Routing tab](image)

**Figure 64. The top portion of the Admin > Caller ID Routing tab**

This tab is where you will set up routing for specific incoming caller ID numbers. The left pane lists the caller ID rules you have already set up; the right pane shows the configuration for the selected Caller ID rule.

Configuring Caller ID Routing

To add a new Caller ID rule to the routing list,
1. On the **Admin** menu, choose **Caller ID Routing**.
2. Click **Add** (below the Caller ID list in the left panel).
3. Enter the Caller ID number, and then enter a descriptive name for this number.
4. Set the routing options for workdays during business hours, workdays during non-business hours, and non-workdays. Refer to the **Time-based Routing Option** table for descriptions of each option.
5. Set additional routing options. Refer to the **URI Attribute Option** table for descriptions of each option.

To edit a Caller ID routing rule, select the entry in the Caller ID Number list, make your changes in the right pane, and then click **OK**.

To delete an entry, select it in the Caller ID Number list and click **Delete**.

Configuring Virtual Extensions

A virtual extension is an entity used to associate with an application. Virtual numbers are not associated with a specific user.
Virtual extensions are used to run CDR Search with the ext # and password. They are also used in AltiReports and in Advanced Call Router (ACR). Beyond those applications, they serve no other purpose.

Use the **Virtual Extension** tab on the **Admin** menu to set up virtual extensions.

**Figure 65. The System > Virtual Extension tab**

To add a new virtual extension,

1. On the **Admin** menu, choose **Virtual Extension**. The left panel shows the virtual extensions that have already been configured in MaxACD, in alphabetical order. The right pane shows the extension number that the system assigned to the selected extension.
2. Click **Add** below the **Name** panel.
3. Enter the required information and click **Ok**.

<table>
<thead>
<tr>
<th>Virtual Extension Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Enter a unique name for this extension.</td>
</tr>
<tr>
<td>Password</td>
<td>Enter a password for this extension.</td>
</tr>
</tbody>
</table>

MaxACD automatically assigns a 6-digit extension number to this new virtual extension.

To remove a virtual extension, select the entry and click **Delete**.
Configuring IVR

The IVR (Interactive Voice Response) feature provides quick and courteous processing of incoming calls/chats. IVR can be configured to serve as a primary attendant or as a backup to a receptionist. In a call-heavy environment, IVR trees can greatly reduce the number of calls that need to be handled by the operator.

When IVR processing is used for Chat, only Advanced Call Router connectivity is supported.

MaxACD’s IVR voice features include:

- Multiple levels of menus.
- Transfer calls to a user or workgroup.
- Dial by Name – Allows callers to reach a user or workgroup by entering a name.
- Name Directory Service – Allows callers to hear a list of Lync users and workgroups.
- Records a voice mail message to a specific user’s mailbox.
- Allows employees to call in and access voice messages from an external location.
- Data-Directed Routing – Allows the routing of calls directed by the caller’s input (digit or text).
- Sets call priority and skill level requirement for workgroup call processing.

The IVR menu offers tabs for configuring IVR trees and managing phrases.

![IVR Configuration tab](image)

**Figure 66. The tabs on the IVR menu**

- The **IVR Configuration** tab is where you set up actions for IVR trees. To begin, see *Planning Is Essential* on page 75.
- The **Phrase Management** tab is where you manage the phrase files in your system. See *Phrase Management - Voice* on page 82 and *HTML Web Chat / Agent Announcement Stylesheets* on page 85.
- For information on the **Multi-Lingual** tab, see *Enabling Multilingual for IVR Systems* on page 81 and *Multilingual Configuration* on page 65.

**Planning Is Essential**

Follow the steps below before you configure your IVR trees.

1. Before you configure tasks for an IVR tree, plan the entire configuration. Decide how many items to provide within each menu, and how many menu levels to use. Based on the action choices in each menu, write down the appropriate prompts or phrases to play at each level.
2. Record phrases for each menu level or use the pre-recorded phrases that are available to you.

**Example: IVR Planning**

<table>
<thead>
<tr>
<th>IVR ID: 100, Phrase 10</th>
<th>IVR ID: 110, Phrase 20</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Main Menu for XYZ Office</strong></td>
<td><strong>Express Support</strong></td>
</tr>
<tr>
<td>Digit</td>
<td>Meaning</td>
</tr>
<tr>
<td>-------</td>
<td>---------</td>
</tr>
<tr>
<td>1</td>
<td>Directions</td>
</tr>
<tr>
<td>2</td>
<td>Appoint</td>
</tr>
<tr>
<td>3</td>
<td>Advisor</td>
</tr>
<tr>
<td>4</td>
<td>Express Support</td>
</tr>
<tr>
<td>5</td>
<td>Sales</td>
</tr>
<tr>
<td>6</td>
<td>Technical Support</td>
</tr>
<tr>
<td>7</td>
<td>Phone FAQs</td>
</tr>
<tr>
<td>8</td>
<td>Other</td>
</tr>
<tr>
<td>9</td>
<td></td>
</tr>
<tr>
<td>0</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Planning is essential in organizing an IVR tree; it helps you to identify the needs for custom prompts. This simple example, using sample work forms for each menu, shows a beginning structure: a main menu and two of the four expansions. When callers are routed to workgroup extensions, the workgroups have their own call handling settings for greetings, update phrases, rules for sending to voice mail, and so on.

Timeout (not shown on forms): when set to "Level - Repeat Current Level," after three 7-second timeouts, an announcement is played and the call is dropped.

**IVR Terminology**

The following terms are used throughout the discussion of IVR systems:

- **IVR Tree** – A unique IVR system with its own name and menus. You can configure multiple IVR trees.
- **Level** – A single branch of an IVR tree. Each level is a menu. IVR trees can have multiple levels.
• **Menu item** – One of the choices on a menu. Each menu can have up to 16 menu items. Menu items typically have phrases that play/display and actions that take place when customers select that digit.

The next figure shows an example of a simple IVR tree with just two levels. The first level menu, the “Top” level, offers seven menu items. If a caller selects menu item #1, a new menu offers five menu items.

![Diagram of an IVR tree with two levels](image)

**Figure 67. A simple IVR tree containing two levels**

### Adding New IVR Trees

MaxACD comes with two IVR trees: a tree named **System** (for Voice calls) and a tree named **System.chat** (for chat sessions). You cannot delete these IVR trees; however, you can customize the behavior for each menu item on those trees.

You can add more IVR trees as needed. Each new IVR tree provides 10 empty menu items with no actions assigned to them. You can edit each item, as described in *Configuring IVR Menu Items* on page 78.

To add a new IVR tree,

1. On the **IVR** menu, choose **IVR Configuration**.
Chapter 9: Configuring IVR

2. In the IVR pane, click **Add**.
3. In the right pane, enter a name for this new IVR tree.
4. Select a media type for this tree (Voice or Chat). Click **OK**.
5. Configure the menu items on this level of the tree by choosing each digit and defining the actions that should take place when callers press that digit.

### Configuring IVR Menu Items

The actions that are available may vary, depending upon the media type (voice or chat).

Each IVR tree has unlimited branches, or **levels**. The following rules guide the basic configuration:

- Each menu item (digits 1 - 0 and T, *, and #) is an action point with a unique ID number and name.
- The top of the tree is a “O” (for Origin).
- A timeout is indicated by a “T.”
- Each menu item can have a prompt. See **Phrase Management - Voice** on page 82 for details on uploading phrases, the acceptable file formats, and where phrase files are stored.
- If you want a menu item to have multiple choices, select “Expand Tree” to create a new level.
- You can jump to any menu item within the same IVR tree.

Every menu item will execute steps according to the following rules:

- First step – Play the prompt, if the **Prompt** checkbox is checked. If **Prompt** is not checked, the system will go directly to the second step.
- Second step – Perform the action specific for this item.
Configuring IVR Menu Items

- Third step – Set the Priority for MaxACD priority queuing. You can assign a priority number from 1-9 to the customer who selects this menu item. The highest priority is 1, the lowest priority is 9. If this box is not checked, go to the next step without delay.

- Fourth step – Set SKLR (Skill Level Requirement) for skill-based routing. You can assign an SKLR from 1-20 to the customer who selects this menu item. If this box is not checked, go to the next step without delay.

- Fifth step – Execute the action assigned to this menu item.

![Figure 69. The IVR Action list](image)

**Note:** At the point when you change a key assignment, any phrases that are currently be playing for that key may not play completely.

### Action Descriptions

The next table describes each option in the Actions list.

Note that for chat IVR trees, the actions that are available are Advanced Call Router, Route to Workgroup, Route to SIP URI, and Disconnect.

<table>
<thead>
<tr>
<th>IVR Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Action</td>
<td>An “invalid” message plays and the menu is repeated.</td>
</tr>
<tr>
<td>Level - Expand Tree</td>
<td>Expand menu item to create a new level.</td>
</tr>
<tr>
<td>Level - Repeat Current Level</td>
<td>Repeat the level that contains the “Repeat Current Level” menu item.</td>
</tr>
<tr>
<td>Level - Go to Top Level</td>
<td>Go to the top level and repeat the action items on the top level.</td>
</tr>
<tr>
<td>Level - Go to Specified Item</td>
<td>Go to selected menu item at any level. A list opens, from which you select the item.</td>
</tr>
<tr>
<td>Route To - Workgroup</td>
<td>Route the customer to a workgroup that you choose. Note that you can only route to workgroups of the same media type.</td>
</tr>
<tr>
<td>Route To - IVR</td>
<td>Route the customer to the IVR system that you choose.</td>
</tr>
<tr>
<td>Route To - SIP URI</td>
<td>Route the customer to a specific user. Enter the user address in the format sip:username@host, or click the small button to search for the appropriate user. Note that you can only route to workgroups of the same media type.</td>
</tr>
<tr>
<td>Route To - Dial By Name</td>
<td>Prompt the caller to enter the name (first, or last, or both in any order) of the person they want to speak with and select the option that matches the name.</td>
</tr>
</tbody>
</table>
Chapter 9: Configuring IVR

Collecting Digits

This feature does not apply to chat IVR.

When a caller selects a menu item that has a "Collect Digits" action item, a custom phrase is required to advise the caller how many digits are required. The system will look at “Min Length” and “Max Length” settings to determine if the Collect Digits action was successful.

- If the correct number of digits was entered, then the system executes the sub-level “&” action item
- If the caller did not enter an acceptable number of digits, then the system executes whichever menu item you define as a fail-over action

To use the Collect Digits action, select the Adv. - Collect Digits action and set additional parameters.

<table>
<thead>
<tr>
<th>IVR Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route To - Directory Service</td>
<td>Play a list of the system users to the caller. For this to work properly, users need to record their directory names.</td>
</tr>
<tr>
<td>Route To - Disconnect</td>
<td>Disconnect the call/chat session. A short phrase is automatically played or displayed before the disconnection.</td>
</tr>
<tr>
<td>VM - Record Message</td>
<td>Leave a voicemail message in the specified voice mail box. Enter the user address in the format sip:username@host, or click the small button to search for the appropriate user.</td>
</tr>
<tr>
<td>VM - Exchange UM Subscriber Access</td>
<td>Allow the caller to log into the Exchange server to access voicemail from the outside. This option is assigned to the “#” key at the top level of each IVR menu, by default.</td>
</tr>
<tr>
<td>Adv. - Collect Digits</td>
<td>See the discussion in Collecting Digits.</td>
</tr>
<tr>
<td>Adv. - Advanced Call Router</td>
<td>Hand over the call to the Advanced Call Router application through the SDK API interface. The ACR application needs to log in to a virtual extension with the correct password. If the ACR application fails to connect, the system will execute the sub-level “&amp;” as a fail action.</td>
</tr>
</tbody>
</table>

**Collecting Digits**

This feature does not apply to chat IVR.

When a caller selects a menu item that has a “Collect Digits” action item, a custom phrase is required to advise the caller how many digits are required. The system will look at “Min Length” and “Max Length” settings to determine if the Collect Digits action was successful.

- If the correct number of digits was entered, then the system executes the sub-level “&” action item
- If the caller did not enter an acceptable number of digits, then the system executes whichever menu item you define as a fail-over action

To use the Collect Digits action, select the Adv. - Collect Digits action and set additional parameters.

![Figure 70. Options for The Collect Digits Action](image-url)
Once the IVR menus are set up, you can use them in various routing situations, including Caller ID routing and
as an answering option for handling busy or no-answer workgroup calls/chats

For details, see the following sections:
- To use IVR trees in URI routing rules, see Configuring Inbound Routing on page 69.
- To use IVR trees in Caller ID routing, see Configuring Caller ID Routing on page 72.
- To use IVR menus in Workgroup call/chat handling, see Configuring Session Handling Options on page 49.

<table>
<thead>
<tr>
<th>Collect Digits Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| Text Tag              | A tag name, which is critical for the following operations:
  - For CDR logging, the IVRData field will log the collected digits as
    "Tag=xxxxx". For example, if tag is configured as “Account” and
    collected digits is “67663”, the CDR database will log
    “Account=67663” in the IVRData field.
  - For MaxAgent client display, the above example is displayed as
    “Account=67663” on the View > IVRData section. |
| Minimum Length        | The minimum length of digits to be collected. |
| Maximum Length        | The maximum length of digits to be collected. |
| PSTN Call Inter-Digit Timeout | The length of time the system will wait between collecting of digits
before timing out. |
| Inter-Digit Timeout after Max Length | The length of time the system will wait after the maximum length of
digits is collected. |
| If failed, go to menu | Specifies which menu item to jump to if the digits cannot be collected
correctly. |

Making IVR Assignments

Once the IVR menus are set up, you can use them in various routing situations, including Caller ID routing and
as an answering option for handling busy or no-answer workgroup calls/chats

For details, see the following sections:
- To use IVR trees in URI routing rules, see Configuring Inbound Routing on page 69.
- To use IVR trees in Caller ID routing, see Configuring Caller ID Routing on page 72.
- To use IVR menus in Workgroup call/chat handling, see Configuring Session Handling Options on page 49.

Enabling Multilingual for IVR Systems

Note: IVR Multi-lingual is not supported for chat workgroups.

After you have recorded language phrases and uploaded them into MaxACD, as described in Multilingual
Configuration on page 65, you are ready to enable multilingual support in the IVR system.

To configure language options for an IVR set,
1. On the IVR menu, choose Multi-Lingual.
2. In the left IVR panel, select the IVR system that you want to configure.
3. Select the Enable Multilingual Support option.
4. Configure the settings appropriate for your system.

<table>
<thead>
<tr>
<th>Multi-Lingual IVR Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Enable Multilingual Support</td>
<td>Enables or disables the multi-lingual options for this IVR set. Check this</td>
</tr>
<tr>
<td></td>
<td>box to enable language support.</td>
</tr>
<tr>
<td>Language Selection Prompt</td>
<td>Enables or disables a prompt to the caller to choose a language. If you</td>
</tr>
<tr>
<td></td>
<td>select this checkbox, choose the prompt that lets the caller select a</td>
</tr>
<tr>
<td></td>
<td>language.</td>
</tr>
<tr>
<td>Digits 1 - 8</td>
<td>Beside each appropriate number, select a language from the list that</td>
</tr>
<tr>
<td></td>
<td>corresponds to the phone key the user would press to hear that language.</td>
</tr>
<tr>
<td></td>
<td>(For example, “For English, press 1; for Spanish, press 2...”)</td>
</tr>
</tbody>
</table>

**Note:** This language configuration is on top of the regular IVR configuration. The system will execute the regular IVR action items after a language preference is selected by the caller.

**Phrase Management - Voice**

This section covers information on how to use pre-recorded phrases, record custom phrases, and use professionally recorded phrases. See the section *HTML Web Chat / Agent Announcement Stylesheets* on page 85 for instructions on uploading HTML phrases for chat sessions.

Phrases are used in many places in the MaxACD system. In addition to the phrases in the IVR system, there are workgroup phrases and personalized agent phrases, for example.

You might want to record unique phrases to customize an IVR for a work group. When the system is configured to have the IVR system answer incoming calls, callers hear a customized greeting. For example, this set of phrases would be appropriate for a voice workgroup:

“Thank you for calling ABC Company. Press 1 for sales. Press 2 for technical support. Press 3 for accounts payable. Press 0 to reach the operator. To repeat this menu, press star (*)."

An example of a group greeting phrase:

“Please hold; someone will be with you shortly.”

You might also want to give callers the option of hearing prompts in another language.
Using Professionally Recorded Phrases

Recording studios such as Worldly Voices provide professionally recorded prompts as electronic files that can be installed and used on the MaxACD system.

To install professionally recorded phrases or prompts,

1. Assign a prompt number to each prompt you would like recorded. Or give the prompt a unique identifying name. MaxACD-supplied phrases are numbered, but phrases don't have to be numbered.
2. Submit your prompt script and prompt name to the recording studio.
3. Instruct the recording studio to record prompts in WMA 16KHz mono CBR format.
4. Once you receive the prompts, upload them into the system as described in Uploading Voice and Chat Phrases on page 83.

Recording Custom Phrases

In Release 7.0, the Custom Phrase Manager tool is no longer included with the product. One tool to consider using is WavePad Audio Editing Software from NCH Software.

We recommend one of the following formats:

- Windows Media Audio 9.2, 16kbps, 16kHz, mono CBR
- Windows Media Audio 9.2, 48kbps, 44kHz, mono CBR

If you are recording your own phrases, use a headset with noise-cancellation ability for the best quality.

Note: In Windows 10, you can no longer record in WMA format.

Music On Hold

You can upload a music file into MaxACD, to play as the music that callers hear while they are on hold.

- The music file must be a .WMA 16k mono format file.
- MaxACD comes with three different music files; you can choose whichever music you prefer. These music files are loaded during installation.

Note: With Lync 2013, if you use a music file that is longer than 7 minutes, callers may hear a few minutes of silence when the music stops. For this reason, we recommend that you limit the files for on-hold music to music that is shorter than 7 minutes in duration.

Selecting On-hold Music

To select which music you want to play for callers who are on hold,

1. On the IVR menu, choose Phrase Management.
2. Open the menu beside “On-Hold Music” and choose a file. If you want to disable hold music, choose Disabled.
3. Click OK.

Uploading Voice and Chat Phrases

You can upload individual phrases as needed. Once you upload a phrase, you can use it in IVR rules and other areas of the product.
To upload phrases into the system,
1. On the IVR menu, choose **Phrase Management**. This tab shows you the phrases and music that are already in the system.

![Phrase Management tab](image1)

*Figure 72. The Phrase Management tab*

2. Click **Add New Phrase**.

![Add new phrase](image2)

*Figure 73. Add a new phrase*

3. Enter a name for the phrase.
4. Complete the remaining fields and click **OK**.

<table>
<thead>
<tr>
<th>Phrase Parameter</th>
<th>Description</th>
</tr>
</thead>
</table>
| **Type**         | • Voice Prompt – These phrases are voice .WMA files, for announcements  
|                   | • Chat Prompt – These phrases are HTML text (*.HTM), for chat sessions  
|                   | • Music – These files are for music on hold. These files must be WMA 16k mono format files  |
| **Phrase File**  | Click **Choose File** and navigate to the appropriate file. Make sure that you select the appropriate file format: .WMA for voice prompts and music on hold files; .HTM for chat phrases  |
| **Language**     | Choose a language. Note that the language field is not supported for chat phrases.  |
| **Description**  | Enter a brief description to describe the file.  |

**HTML Web Chat / Agent Announcement Stylesheets**

To configure the appearance of html phrases for chat sessions, and for agent announcements for chat sessions, you can add or edit style sheets.

1. On the **IVR** menu, choose **Phrase Management**.

2. Click the button beside **Inline Style Sheet**. You see a list of style sheets that have already been configured, including one that is provided with MaxACD as a default, which is appropriately named **Default**.

3. To edit one of the existing style sheets, click **Edit** beside it. Edit the HTML code as needed, and then click **OK**. Or, if you want to reset this style sheet to the default, click **Reset to default value**.

4. To add a new style sheet, click **Add Style Sheet**.

---

**Figure 74. The style sheets**
5. Give the style sheet a unique name, and modify the default HTML code as needed. Click **OK** and click **Done**.
Configuring Business Hours and Holidays

The Work Hours menu offers two tabs.

Figure 76. The tabs on the Business Hours menu

- The Business Hours tab is where you customize the default business hour profile and create additional profiles as needed. See Defining Business Hours on page 87.
- The Holidays tab is where you customize the default holiday profile and create additional profiles as needed. See Defining Business Holidays on page 89.

Defining Business Hours

MaxAdmin comes with a default business hour profile, named System. You can set up additional business hour profiles, as needed.

Business Hours profiles affect other system settings, such as Workgroup Business hours.

Note: Because the business hours are used throughout the system, make sure the system time has been set correctly.

Figure 77. Business Hours configuration
You cannot delete the default business hour profile, named System. However, you may add additional profiles as needed. Each profile can have unique working days and business hours.

To change a profile, choose Business Hours from the Work hours menu.

**Modifying the Default Business Hours Profile**

To change the hours of the default Business Hours profile, System,

1. On the Work Hours menu, select Business Hours.
2. In the Business Hours panel, select System.
3. In the right pane, modify the start and end times for each day, as needed.

<table>
<thead>
<tr>
<th>Business Hours Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Day</td>
<td>Select the days of the week during which the company does business. For example, if the company does business on only Monday – Friday, check the boxes for those days.</td>
</tr>
<tr>
<td>AM and PM Schedules</td>
<td>For each day, select the time periods during which the company is available for business. The time between the AM and PM times can be used to indicate a lunch break or time between shifts. Times are in 24-hour format; in other words, to indicate one o'clock in the afternoon, use 13:00. If you don't want to set a break between AM and PM schedules, set the PM starting time to be the same as the AM ending time.</td>
</tr>
</tbody>
</table>

**Creating New Business Hours Profiles**

To add new Business Hours profiles,

1. On the Work Hours menu, choose Business Hours.
2. On the Business hours tab, click the Add button directly below the Profiles list.

![Figure 78. The Business Hours Profile list](image)
3. In the Name field, enter a unique name for this profile. Modify the start and end times for each day, or clear workdays, as needed, and then click **OK**. Remember, times are in 24-hour format; to indicate one o’clock in the afternoon, use 13:00.

![Figure 79. Specifying work hours for the new profile](image)

### Deleting Business Hours Profiles

**Note:** You cannot delete the default profile, **System**.

To delete one of your custom Business Hours profiles, select it in the left pane and click **Delete**.

### Defining Business Holidays

You can define sets of Holiday profiles as needed, and have separate holiday profiles for voice calls and chat sessions. Holiday profiles are essentially lists of holidays with routing rules for those days.

**Considerations:**
- Two default Holiday profiles are included: **System** (for voice calls) and **System.chat** (for chat sessions). You cannot delete either of these profiles.
- You can add other profiles as needed, for both voice calls and chat sessions.
- Each profile can have unique holidays.
- Multiple profiles can be assigned to Caller ID and URI Routing entries.
- You can copy holidays from one profile to another profile of the same media type.

For holidays that your organization treats as half-days, you can create separate profiles for business and non-business hours.
As with the Business Hours profiles, you must select a profile in the left pane in order to update its holidays in the right pane.

**Note:** Incoming DID calls will not follow the Holiday routing rules, but will instead go to the dialed extensions directly.

### Modifying the Default Holiday Profiles (System or System.chat)

To change a holiday in the default profile, System,

1. On the **Work Hours** menu, choose **Holidays**.
2. In the Holiday Profiles list on the left, select **System** or **System.chat**.
3. To add a new holiday to this profile, click **Add Holiday**.
4. Configure the details for this holiday, and then click **OK**.

<table>
<thead>
<tr>
<th>Holiday Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>The date of this new holiday.</td>
</tr>
<tr>
<td>Description</td>
<td>A unique description of this new holiday.</td>
</tr>
<tr>
<td>Route to Workgroup</td>
<td>Routes incoming calls/chats to the group that you select. You must select a workgroup of the same media type as this profile.</td>
</tr>
<tr>
<td>Route to IVR</td>
<td>Routes incoming calls to the IVR menu that you select. This option does not apply to Chat holiday profiles.</td>
</tr>
<tr>
<td>Route to SIP URI</td>
<td>Routes incoming calls/chats to a SIP URI. Either type the user’s address or click the small button to the right to search for the user.</td>
</tr>
</tbody>
</table>
If staff will be working during this holiday, configure the **Work Hours During Holiday** options.

<table>
<thead>
<tr>
<th>Holiday Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Route to Voicemail</td>
<td>Routes incoming calls to the Voicemail mailbox of the Lync user that you</td>
</tr>
<tr>
<td></td>
<td>select. Either type the user’s SIP URI or click the small button to the right</td>
</tr>
<tr>
<td></td>
<td>to search for the user.</td>
</tr>
<tr>
<td></td>
<td>This option does not apply to Chat holiday profiles.</td>
</tr>
</tbody>
</table>

To delete a holiday from this profile, select it in the Holiday list and then click **Delete Holiday**.

### Adding New Holiday Profiles

To add a new profile,

1. On the **Work Hours** tab, choose **Holidays**.
2. Click **Add Profile**.
3. In the **Name** field, enter a unique name for this new Holiday profile.
4. Select a media type for this profile (voice or chat), and then click **OK**. You now see that profile in the left pane, along with the default profile.
5. To add holidays to this new Holiday profile, you can choose from two options:
   - Follow the steps in *Modifying the Default Holiday Profiles (System or System.chat)* on page 90, except in step 2, select the new profile.
   - If appropriate, copy the holidays from another profile (refer to the discussion in *Copying Holidays from One Holiday Profile to Another*). You must click **OK** to save the new profile before you can copy holidays into it.

To delete a Holiday profile, select it in the Holiday Profile panel and then click **Delete Profile**.

### Copying Holidays from One Holiday Profile to Another

In this release, you can copy a set of holidays from one Holiday profile to another.

**Note:** When you copy holidays from another profile, not only the holiday names and dates will be copied, but the other configuration details for each holiday will be copied as well. In other words, the settings in the **General** and the **Work Hours During Holiday** section for each holiday will also be copied. Because the original routing rules may not be appropriate for the current profile, check the configuration carefully and modify the rules as needed after you copy holidays from another profile.

To copy a set of holidays to a profile:

1. On the **Work Hours** tab, choose **Holidays**.
2. In the **Holiday Profiles** list, select the profile that you want to update.
3. In the **Copy holiday from** section near the bottom of the tab, open the menu and select the profile that includes the holidays that you want to copy into this profile. Click **Copy**. You will see a warning message, informing you that copying these holidays will overwrite any current holidays for this profile.
4. After the holidays are copied into this profile, make sure that you check and adjust the routing rules and other parameters as appropriate.

Creating A Similar Profile for Voice or Chat

If you have defined a profile for voice, and wish to create a similar profile for chat (and vice versa),

1. On the Work Hours tab, choose Holiday.
2. In the Holiday Profile panel, select the profile that you want to copy to the other media type.
3. In the bottom right corner of the tab, click Add Media.

Notes:

• The Add Media button will not be offered if there is already a companion media profile for this profile. In other words, if you selected a voice profile named Boston, but there is already a chat profile named Boston.chat, you will not see this button.
• When you use Add Media to add a new profile, the holidays will not be copied over. The button simply creates an empty profile for you. Save the new profile, and then you can use the Copy holidays from feature to copy holidays from another profile.
• Once you create the profile the profile for the other media, the names of those two profiles stay coordinated; in other words, if you rename one of the profile pairs, the other profile is automatically renamed for you.

Renaming Holiday Profiles

To rename a profile, select it and enter a new name for it. If there are two profiles (one for voice and one for chat), the system will rename the other media profile automatically for you.

Updating the Dates of Annual Holidays

To adjust an annual holiday,

1. On the Work Hours tab, choose Holidays.
2. Select the appropriate profile in the Holiday Profile panel.
3. Select the appropriate holiday from the Holiday list.
4. Click the calendar icon beside the date to choose assign a new date. Click OK.
Configuring Redundancy

For full details on deploying a redundant MaxACD system, refer to the MaxACD 7.0 Deployment Guide. A Redundancy license is required to enable the redundancy feature.

MaxACD 7.0 supports redundancy; you can have a primary MaxACD server plus a secondary MaxACD server. Once you have configured the redundancy feature, if the active server fails, the standby server takes over. The change is transparent to direct connected calls.

After you configure redundancy, the second server will get the license information from the first server.

There are two primary processes involved in configuring redundancy:

- During the deployment of MaxACD, within the installation wizard, choose Redundancy instead of Single Server, and enter the IP address of both servers. You must assign the same System ID number to both systems during installation. For details, refer to the MaxACD 7.0 Deployment Guide.

- After deployment, within Administrator Portal, you must enable redundancy. You do this on the Redundancy tab of the System menu.

We recommend that you encourage users to use the FQDN to access MaxAgent, MaxSupervisor, MaxInsight, and MaxReports, and that administrators use FQDN to access the MaxACD Administrator portal.

Enabling Redundancy

1. On the System menu, choose Redundancy.
2. Select the checkbox Enable Redundancy.

This tab shows the current state of both servers. It also shows the date and time of the most recent switchover, and the reason for that switchover:

- Automatic – The switchover was automatically performed by the system, in response to a hardware issue
Manually Switch to the Standby Server

Be aware that all active WG calls and chat sessions will drop after a switchover. Voicemail messages will stop recording, CDRs will be dropped, and daily RTM statistics will be reset.

If you need to switch to the standby server,

1. On the System menu, choose **Redundancy**.

   ![Redundancy Configuration](image)

   *Figure 82. The System > Redundancy tab*

2. Click **Manual Switchover**.

   **Note:** If the active system needs to be shut down for maintenance, you should manually switch control to the standby server before you shut down the active server.
Configuring Admin Users

There are two different types of Administrator users in MaxACD:

- **Administrators**, who have full rights to configure the system (including all configuration tools found on the System > Server menu).
- **Workgroup Supervisors**, who have rights to manage specific workgroup settings.
  - Workgroup Supervisors do not have access to system configuration settings.
  - Workgroup Supervisors cannot add or delete workgroups.
  - Workgroup Supervisors can redirect calls and chat sessions, and can change the priority of calls and chat sessions, using MaxSupervisor.
  - Workgroup Supervisors can edit workgroup users' General, Group Membership, and Monitor List tab options; only those agents who belong to one of the Supervisor's workgroups will appear on the User tabs.
  - Workgroups can have multiple Supervisors.
  - Workgroup Supervisors can manage multiple workgroups.
  - Each workgroup has its own supervisor control option (enable/disable), independent of other workgroups. The setting is found on the Workgroup > Queue tab.

Adding Administrators and Workgroup Supervisors

You can grant users Administrator rights as needed.

1. On the Admin menu, choose Admin User. You see the Administrator and Workgroup Supervisor accounts that have already been configured.
2. Click Add New User.
Chapter 12: Configuring Admin Users

3. Search the users in the Active Directory for the specific user that you want to make an Administrator or Workgroup Supervisor. There are several ways to search. For example, you can search by first name or last name, without adding spaces in the search criteria.

You can also use a space character to separate criteria for the first and last names. For example, entering the search criteria A <space> J will return a list of users whose first name begins with the letter A and whose last name begins with the letter J.

Note that the search results list the user’s name and UPN address.
4. In the search results, click the name of the user whose account you want to configure.
5. When you return to the Admin user tab, the UPN, First name, and Last name fields automatically populate. Configure the privileges.
6. If you selected **Workgroup Supervisor**, select which workgroups this user can manage.

![Figure 86. Making a user a Workgroup Supervisor](image)

<table>
<thead>
<tr>
<th>Admin User Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Privilege        | The privilege type for this user:  
  - **Admin users** have full rights to configure the MaxACD system.  
  - **Workgroup Supervisors** have rights to manage settings for specific workgroups. |
| Workgroup        | If you chose **Workgroup Supervisor** for the Privilege choice, an additional section appears; choose which workgroups this user will manage. To select (or clear) all workgroups, select the checkbox in the heading. |

For instructions on how to enable Workgroup Supervisor privileges for a workgroup, refer to **Allowing Supervisors to Manage the Queue** on page 60.

**Changing Administrator Privileges**

To change the privileges for an Admin user,
1. On the Admin menu, choose **Admin User**.
2. Click **Edit** beside the name of the user whose account you want to update.
3. Change the privilege type or workgroup assignments as needed, and then click **OK**.

To remove an Admin user’s privileges, select the user and click **Delete**. The user remains in the system but no longer has administrative privileges.
MaxACD comes with the following tools and applications for testing, diagnosing and configuring your system. They are available from the Windows Start menu: **Start > All Programs > MaxACD 7.0.**

![Tools Menu](image)

**Figure 87. The tools found on the Windows Start menu**

- A tool to back up and restore data; see **Backup and Restore Utility** on page 99
- A service utility; see **Start & Stop All MaxACD Services** on page 102
- A trace collection tool; see **Trace Collector** on page 103
- A database connection tool; see **CWSDB Connection Tool** on page 105

**Backup and Restore Utility**

To back up or restore data, from the Windows Start menu, choose **All Programs > MaxACD 7.0 > Backup and Restore.**
Appendix A: Tools and Applications

Figure 88. The Backup and Restore tool

Note: The Backup and Restore tool is not available from a remote MaxACD Admin client.

Backup Configuration

To configure backups,

1. Open the MaxACD Backup and Restore tool.
   The first field, CWSDS Server, is read-only.

2. For the Backup Directory field, specify the folder where you want to store backup files. Each day has its own folder in the location you specify. The default path is \Program Files (x86)\Microsoft SQL Server\MSSQL10.SQLOCSDS1\MSSQL\Backup.
   Keep in mind that the path you enter here should be a path on the SQL server, which may or may not be the local server.

3. Click OK.

Make sure that the account of the SQL Server service has appropriate privileges to access the backup directory that you indicate here.

Mapped network drives are not allowed.

Configuring a Weekly Backup Schedule

You can configure this utility to back up your files on specific days of the week, at a specific time for each day.

1. Open the MaxACD Backup and Restore tool.

2. For each day of the week (Monday through Sunday) that you want to perform a backup, check that day’s checkbox.
3. For each of the backup days you selected, use the arrow buttons to set the time of day that you want the backup operation to begin.

4. Click **OK**.

**Performing a One-Time Backup**

You can perform a backup outside of the regular weekly backup schedule, as needed.

1. Open the MaxACD Backup and Restore tool.
2. Click **Backup**.

3. Choose from the following options:
   - Select **Day of week** if you want to make a backup to a specific day of the week folder. Then select the day and click **OK**.
   - Select **Custom path** if you want to save a backup to a different drive or folder. Then navigate to the appropriate drive and folder. The path you enter here should be a path on the SQL server, which may or may not be the local server.
Appendix A: Tools and Applications

**Restoring Backed up Files**

**Note:** To restore files from one system to another (when, for example, switching to a new server due to a hardware failure), the system that you are restoring data to must have the **same machine name** as the system from which you performed the backup.

To restore files from a backup,

1. Stop all MaxACD services. Use the MaxACD 7.0 **Service Utility** to do this.
2. Open the MaxACD Backup and Restore tool.
3. Click **Restore**.

![Figure 91. Restore configuration](image)

4. Choose from the following options:

   - Select **Day of week** if you want to restore from a backup file from specific day of the week. Then select the day and click **OK**.
   - Select **Custom path** if you want to restore from a different backup file than the weekly scheduled backups. Then navigate to the appropriate drive and folder. The path you enter here should be a path on the SQL server, which may or may not be the local server.

   **Note:** The two checkboxes in this panel are used when migrating to a redundant configuration, and are not supported in this release.

5. Click **OK** to start the restore process.
6. When the process has been completed, use the **Service Utility** to restart the MaxACD switching services.

**Start & Stop All MaxACD Services**

We recommend that you use the Services Utility to start or stop all MaxACD services. From the Windows Start menu; choose **Start > All Programs > MaxACD 7.0 > Service Utility**.
To shut down all MaxACD services, click the **Shutdown All MaxACD Services** button. Some examples of when you might want to do this are before you upgrade, before running some utilities and tools, and to apply certain configuration changes.

To start all MaxACD services, click the **Start All MaxACD Services** button.

**Note:** If you shut down services through Windows instead of using the MaxACD Services Utility, the Logger Service may not restart correctly. If this occurs, refer to the *MaxACD 7.0 Deployment Guide* for steps to resolve the issue.

### Trace Collector

The Trace Collector is for use by experienced technicians. It collects traces for diagnostic purposes, and lets you upload the results to AltiGen Technical Support right from the Trace Collector window.

Technicians can run the Trace Collector tool from the Windows **Start > All Programs > MaxACD 7.0 > Tools** menu, and also from the MaxACD Diag menu. Log in with the super technician password “jazzy” and use the current password when logging into MaxACD Admin. This enables the diagnostic menu options.

The Trace Collector first examines the running status of MaxACD, and then checks whether each trace status is on or off. If a trace status is turned off, the MaxACD system will not produce those traces. A message appears if MaxACD is not running or an important trace status is off.
Figure 93. The Trace Collector tool

Following are descriptions of the fields in the Trace Collector.

**Case Number** – Enter the AltiGen case number associated with this trace collection activity. The case number will comprise the first part of the file name of the collected trace package.

**Problem Description** – Enter a description of the problem, including the extension number involved, the time when the problem happened, how to reproduce the problem, and so on.

**Time Range** – The tool collects the trace between the time ranges. The time range covers before and after the defined Date and Time. The default Date and Time is one hour before the current date and time, and the default variation is 60 minutes.

**Trace Category**

- **Main MaxACD Trace** (AltiServLog) – Collects the MaxACD trace files, and extracts the trace records that fall in the specified time range.
- **System Configuration Data** – Collects system configuration data, including System, Extension, Trunk, AA configurations, and Read OE files.
- **Service Provider Log Dump** – Runs SPDump.exe to dump the SP log into files, then collects the trace.
- **AltiConnect Trace Dump** – Runs acdump.exe to dump the AltiConnect Trace, and then collects the trace. If Trace Collector is running on the stand-alone gateway machine, this option is hidden.
- **Windows Event log** – Extracts the system and application event log from the Windows system.

**Start Collecting** – Begins the trace collection, according to the time range and trace categories you chose. All collected files will be zipped to a single file, which will be listed in the Collected Trace Packages list box. The progress bar will display the progress of the whole process.
Storage Folder – The collected trace package is saved in this folder. The format of the file name is CaseNumber_Year_Month_Day_Hour_Minute_Second_ComputerName.zip.

Free Space – Displays the free space of the drive where the storage folder is located. The folder must be in a local drive.

Change Storage Folder – Opens a browser window, where you can select a different storage folder. After the change, Storage Folder, Free Space, and the package list are refreshed to reflect the status of the new storage folder.

Explore Storage Folder – Opens the storage folder in a new window.

Upload Package to FTP – Opens an FTP configuration dialog box. After you complete the required configuration, Trace Collector uploads the selected package to the AltiGen Tech Support FTP site.

CWSDB Connection Tool

MaxACD includes a service configuration tool, which you can use to configure (or reconfigure) connection information between MaxACD components. After you make configuration changes with this tool, other components such as the CWS server and the MaxACD server will reload the configuration.

To use this utility, from the Windows Start menu, choose All Programs > MaxACD 7.0 > Tools > CWSDB Connection Tool.

![Service Configuration Tool]

- **CWSDB Server** – The IP address of the CWSDB server.
- **Database Instance** – The address of the MaxACD server. This entry can be either the IP address of the server or an FQDN of up to 128 characters in length.
- **Port** – The TCP port for the ODBC connection; this entry must be an integer from 0 - 65535.
- **Database Name** – The CWSDB database name.
- **User ID** – The ODBC connection login user ID; this entry can be up to 128 characters.
- **Password** – The password (up to 32 characters) of the ODBC connection login user.

**Figure 94. The CWSDB Connection tool**

- **CWSDB Server** – The IP address of the CWSDB server.
- **Database Instance** – The address of the MaxACD server. This entry can be either the IP address of the server or an FQDN of up to 128 characters in length.
- **Port** – The TCP port for the ODBC connection; this entry must be an integer from 0 - 65535.
- **Database Name** – The CWSDB database name.
- **User ID** – The ODBC connection login user ID; this entry can be up to 128 characters.
- **Password** – The password (up to 32 characters) of the ODBC connection login user.
Appendix A: Tools and Applications

- **Timeout** – The ODBC connection timeout, in seconds; this entry must be an integer from 1 to 255. The default value is 10 seconds.

Do not open more than one instance of the Service Configuration tool at a time.
If MaxACD is behind a firewall/NAT router, open ports according to the following table.

### To connect the following applications through a firewall

<table>
<thead>
<tr>
<th>Application</th>
<th>TCP</th>
<th>UDP</th>
</tr>
</thead>
<tbody>
<tr>
<td>MaxAgent VM service for MaxAgent</td>
<td>10025</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10026</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10028</td>
<td></td>
</tr>
<tr>
<td>MaxSupervisor</td>
<td>10025</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10027</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10028</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10029</td>
<td></td>
</tr>
<tr>
<td></td>
<td>10050</td>
<td></td>
</tr>
<tr>
<td>Client Applications Auto Update</td>
<td>10050</td>
<td></td>
</tr>
<tr>
<td>VRManager</td>
<td>10040</td>
<td></td>
</tr>
<tr>
<td>(VRManager may not work behind NAT)</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### MaxACD connects the following application through a firewall

<table>
<thead>
<tr>
<th>Application</th>
<th>TCP</th>
</tr>
</thead>
<tbody>
<tr>
<td>External CDR Logger Service</td>
<td>10027</td>
</tr>
</tbody>
</table>
Appendix B: Network Ports
This section describes AltiGen technical support policy and procedures.

**Knowledge Base:** AltiGen's knowledge base is available online at https://know.altigen.com. Another online resource is the MaxACD site, http://maxacd.com/.

End user customers, please contact your Authorized AltiGen Dealer for technical support.

Authorized AltiGen Partners and distributors and Direct Customers on a Direct Support Plan may contact AltiGen technical support by the following methods.

- You may request technical support on AltiGen's Partner web site, at https://mspartner.altigen.com. Open a case on this site; a Technical Support representative will respond within one business day (Tier 1 Direct Customers must call to open a case).

- Call 888-ALTIGEN, choose option 5 from the IVR, or 408-597-9000, option 5 from IVR, and follow the prompts. Your call will be answered by one of AltiGen's Technical Support Representatives or routed to the Technical Support Message Center if outside of normal business hours and no one is available to answer your call.

Technical support hours are 5:00 a.m. to 5:00 p.m., PST, Monday through Friday, except holidays.

If all representatives are busy, your call will be returned in the order it was received, within four hours under normal circumstances. Outside AltiGen business hours, only urgent calls will be returned on the same day (within one hour). Non-urgent calls will be returned on the next business day.

Please be ready to supply the following required information when calling in for Support:

- Partner ID
- AltiGen Certified Engineer Tech ID
- Serial numbers for any applicable hardware (chassis, boards, and so on)
- Number and types of boards in the system, if applicable
- MaxACD version number
- Server model
- The telephone number where you can be reached

Be prepared to answer the following questions:

- Is this a virtual or a standalone server installation?
- If this is a virtual installation, it is installed in VMware environment or Hyper-V? What is the version number of the virtual server?
- How much memory and how many CPU's are reserved for MaxACD Server use? Memory and CPU cores should always be dedicated and reserved for MaxACD Server use exclusively.
Appendix C: Technical Support

- Are SSD drives installed? If not, be prepared to describe what NAS devices are installed and whether they are shared or dedicated to the MaxACD server.
Index

A
account codes
  configuring 15
  enabling per user 30
user options 30
admin users 95
agent logout reason codes 16
agent personal announcement 33
allow pick-up call from queue 33
assigning to users
caller IDs 30
client licenses 8, 28

B
backups 99
  restoring files from 102
  scheduling weekly 100
block account code display 30
business hours 87
  setup 88

C
call forwarding 50
call recording
  configuring 17
  file names 17
call routing, See routing calls.
call SKLR setting 79
caller IDs 30
changing the Admin password 9
chat deployment
  See the MaxACD 7 Web Chat Deployment Guide
chat workgroups 38
client licenses 8, 28
collecting digits, in IVR 80
collecting traces 103
CSWDB Connection tool 105

D
default password, MaxACD Admin 5
Dial-by-Name service
  users 29
workgroups 42

F
firewall, opening ports 107

H
holiday profiles 89
holidays 87, 89
  updating annual dates 92
work hours 91

I
IVR
  actions 79
  collecting digits 80
  configuring 75
  expanding 76
  making assignments 81
  menus 78
  multi-lingual support 81
  professionally recorded phrases 83
  prompts 82
  setting call SKLR 79
language for URI routing 72
IVR multi-lingual support 82
rules MaxACD follows 67
uninstalling 67
uploading new 67
licenses
  assigning to users 8, 28
  available for MaxACD 4
  registering 9
  viewing total and in-use 7
logging in 5
logging out 7
logout reason codes 16
Lync presence mapping 22

M
main phone number, entering 12
MaxACD Admin
  changing the password 9
logging in 5
MaxACD services
  stop & start 102
maximum retry count 13
Menu bar 6
monitoring privileges 34
multilingual system. See languages.
music on hold 83

N
network ports used by MaxACD 107

O
on-hold music 83

P
passwords, changing 9
phrases
  style sheets for 85
  uploading 83
ports, network 107
prompts
  in other languages 65
  multilingual 66
  multiple languages, storing 66
queue announcement 58
queue management
  for workgroups 57
queue phrases 58

R
recording
  file names 17
  See also call recording
  recording options
  for workgroups 61
redundancy
  architecture 93
  configuring 93
registering licenses 9
restoring files from backups 102
retry interval 13
routing calls
  by caller ID 73
  by URI 69

S
scheduling backups 100
services
  MaxACD, stop & start 102
SNMP
  configuring 18
  list of traps 20
  trap OID numbers 21
starting MaxACD services 102
stopping MaxACD services 102
style sheets for phrases 85
system requirements 3
system work days configuration 88

T
TCP ports 107
technical support 109
tools
  backup and restore tool 99
  CWSDB Connection tool 105
diagnostic tools 99
  start and stop MaxACD services tool 102
  trace collector tool 103
traces, collecting 103

U
UDP ports 107
uploading phrases 83
users
  adding to MaxACD 31
  adding to workgroups 31
  allowing wrap-up time 32
  assigning client licenses 8, 28
  forcing account code entry 30
  monitor privileges 34

W
web chat deployment
  See the MaxACD 7 Web Chat Deployment Guide
work days, setting up 88
workgroups
  adding members 31
  business hours 45
  configuration 37
  handling calls 54
  non-workday scheduling 46
  queue management 57
  recording options 61
  wrap-up time 32