



Spectrum Agent Training Guide

2013
Revision by Jackie



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SPECTRUM SYSTEM

SPECTRUM
AGENT TRAINING
GUIDE

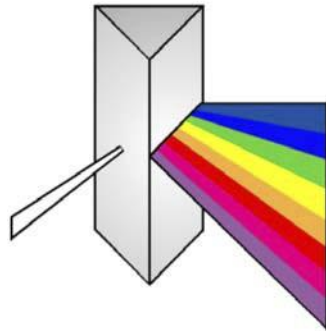


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SPECTRUM™

SPECTRUM AGENT TRAINING GUIDE

Welcome to the world of Spectrum and Telescan Corporation. We are excited to begin our relationship with you. As you will learn over the course of training, the Spectrum system is a feature-rich system with endless applications and capabilities. Our initial goal in training is to provide you with a foundation of understanding. Once you have learned the "basics", you will then be better able to understand the nuances of the system and to use the Spectrum system to its full potential. To assist in this, Telescan also offers "advanced" classes as well as detailed documentation.

GUIDE OVERVIEW

**Operation
Messages
Delivery
Options**



Agent Functions:

- f **The Agent Screen and Keyboard Overview**
- f **The Basic Telephony Capabilities (Answering Calls, Putting Calls on Hold, Transferring Calls, etc.)**
- f **Using the Hypertext Applications and Speed Dials**
- f **Entering Data (Messages, Special Locates, Flags, "IF" Messages, etc.)**
- f **Message Delivery (Dialing out, Paging, Faxing, etc.)**
- f **Message Transmission**
- f **Optional and Advanced Features**

Getting Started

The Spectrum Agent Screen

The screenshot shows the Spectrum Agent 7 interface with the following components labeled:

- Message status:** Points to the top status bar showing "1 Undelivered", "6 Delivered", and "1 In Progress".
- Active Alert:** Points to the "Active Alert" section on the left.
- Information screen:** Points to the large central text area displaying "This is an information screen."
- On-call scheduler:** Points to the "On-Call Instructions" and "3 On-Call at current time" section on the left.
- Caller ID:** Points to the "814674431" display in the bottom status bar.
- Pending work:** Points to the "2 INCOMPLETE", "1 PENDING PAGE", and "1 REMINDER" section in the bottom status bar.
- Operator ID:** Points to the "JJF Entering Scripted Msg" section in the bottom status bar.
- Client's time zone:** Points to the "Thu 06:35a Pacific" display in the top right.
- Agent shortcut buttons:** Points to the vertical column of buttons on the right side of the screen.
- Current state:** Points to the "JJF Entering Scripted Msg" section.
- Call Activity (Talk 1 -> Talk 4):** Points to the "TALK 1" through "TALK 4" buttons.
- Call timer:** Points to the "00:03" display.
- System date/time:** Points to the "19-Sep-13 9:35A" display.
- Status indicators (Prism, SDM, Logger, On-call):** Points to the indicator lights in the bottom right.

The Spectrum Agent Keyboard

The image shows the Spectrum Agent keyboard with the following function keys labeled:

- Status Clear:** Points to the red "STATUS CLEAR" button.
- Message entry/delivery and copy/save:** Points to the row of buttons including "IF ENTER MSG", "IF DELIVER MSG", "UNDLVR REDLVR", and "COPY SAVE".
- Call activity Talk 1 -> Talk 4:** Points to the "TALK 1" through "TALK 4" buttons.
- Dispatching, Locates, & File:** Points to the "PATCH", "PAGE", "DELETE LOCATE EDIT", and "CT, REM FILE" buttons.
- Escape:** Points to the "ANSWER" button.
- Hold:** Points to the "HOLD" button.
- Numeric dial pad & Sign on/off:** Points to the numeric keypad and "DIAL", "REWIND FLAG", and "SIGN ON/OFF" buttons.

GETTING STARTED

Function and Dual-Function Defined Keys

Many function keys have dual functions. The function on the lower-half of the key can be initiated by pressing the key. Functions listed on the top-half of the key can be initiated by pressing the key in conjunction with the [SHIFT] key.

Agent Shortcut Buttons in the colored display list on the right hand side of the Agent console, work similarly to the functional keystrokes and keystroke combinations as mentioned below.

STATUS/CLEAR	<p>[CLEAR] disconnects the agent from the line.</p> <p>[SHIFT]+ [STATUS] to display the console's "System Status" screen that shows every stations' pending pages, station activity, call and trunk activity.</p>
IF/ENTER MSG	<p>[ENTER MSG] to start a scripted message on an account, add another Page ticket to a message, to mark a message as 'Reviewed', or to edit a Reminder after it has been created.</p> <p>[SHIFT]+ [IF/ENTER MSG] to create an IF (temporary, internal) message for an account.</p>
IF/DELIVER MSG	<p>[DELIVER MSG] to display the Undelivered Message List or Orders for the displayed account and it will also display the list of purple flashing Transmit Error Memos (from a blank screen and a 'Standby' state).</p> <p>[CTRL]+ [DELIVER MSG] to search the system for undelivered messages.</p> <p>[SHIFT]+ [IF/DELIVER MSG] to deliver an IF (temporary, internal) message.</p> <p>[CTRL]+ [ALT]+ [DELIVER MSG] to see list of 'saved' messages on an account.</p>
UNDLVR/REDLVR	<p>[REDLVR] to display the Delivered Message List, a list of messages that have previously been delivered in some way.</p> <p>[ALT]+ [REDLVR] to access long-term the Retained Message List.</p> <p>[SHIFT]+ [UNDLVR/RDLVR] to return a message that has already been delivered back to the Undelivered Message List.</p>
COPY/SAVE	<p>[SAVE] to edit an undelivered message or to force a message on to the Incomplete Message stack. [ALT]+ [COPY] to make a copy of a message for a designated account AND make any necessary editing corrections. You press [FILE] to initiate.</p>
TALK 1-4	<p>[TALK] keys correspond to 1 of 4 activity windows on-screen and will be used to answer incoming calls, to dial-out, and to patch.</p>
PATCH	<p>[PATCH] initiates a conference call connecting an incoming call with an out-going one.</p>
PAGE	<p>[PAGE] to generate a Page ticket, to remove an attached one, or to act on a 'Pending Page' prompt by displaying the Pending Pages List.</p>
DELETE/LOCATE EDIT	<p>[LOCATE EDIT] to enter or update the Locate Instructions.</p> <p>[ALT]+ [LOCATE EDIT] to edit an accounts Expanded Locate Instructions screens.</p> <p>[SHIFT]+ [DELETE/LOCATE EDIT] 2 times in order to delete Locate Instructions.</p> <p>[DISPLAY]+ [LOCATE EDIT] (or use the [*] key in the Numeric keypad) to view Expanded Locate Instructions (ELI) information while answering an incoming call or when dialing out.</p>
FILE	<p>[FILE] is also used to signify the completion of work, like entering Locate Instructions, entering a Page ticket or a Reminder, etc.</p>

GETTING STARTED

SIGNING-ON TO THE AGENT CONSOLE



From the "Idle" state,

Press the **[SN ON]** key (on Numeric keypad) or if using the mouse, click the **[On/Off]** Agent Shortcut Button (on the right).

Enter a **3-Digit User Name** (letters or numbers).

Enter 1-5 character **Password**, if prompted

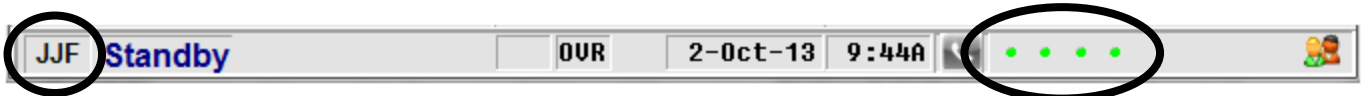
Press **[SELECT]** to enter the "Standby" state.



Once the **User Name** and **Password** are validated, the Console will enter the "Standby" state and will be available to accept calls. User Name and Password access informs the system which accounts to route to the Console and what capabilities have been enabled for an agent while the agent is Signed-On.



The middle panel at the bottom the Agent Window displays Agent status. Responses (such as 'Email Queued') will typically be displayed with a green background. Error messages will have a **red background** and will beep when displayed.



In the far right of the status information are four **Network Status Indicators (dots)**. Each indicates the status of one of the four TCP/IP network connections maintained by the Agent program. From left-to-right, they are the **Telephony status (Prism)**, the **Data Manager status**, **Voice Logger status**, and **connection to On-call Scheduler**. By resting the mouse over the appropriate status indicator, a text description of the status will 'pop-up'

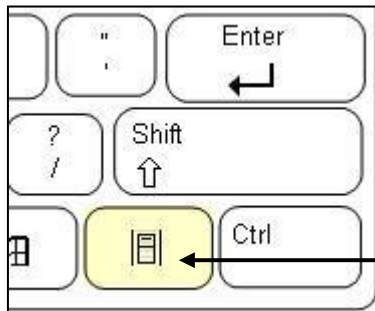
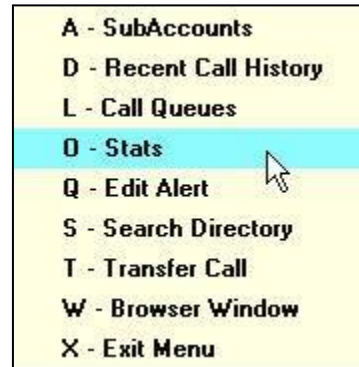
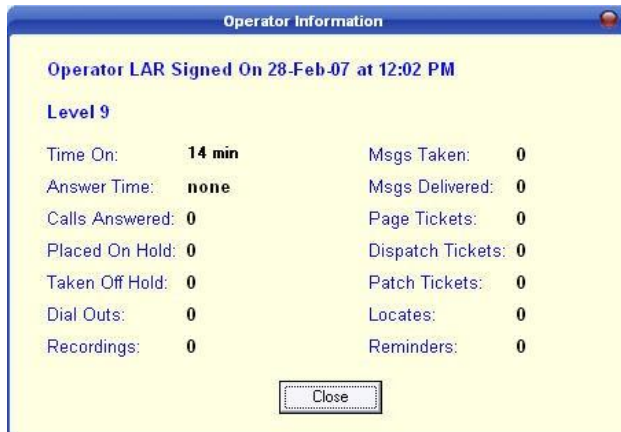
The color of the indicator reflects the status as follows:

- Grey (NOT ENABLED)
- Red (NOT CONNECTED)
- Green (CONNECTED)

GETTING STARTED

OPERATOR INFORMATION

Upon validation, the **Operator Information** pop-up window will be presented that displays the accumulated agent totals since sign-on.



An Agent may view his/her statistics at anytime during the current sign-on session by pressing the "Microsoft Application" key located next to the right hand side **[CTRL]** key on the keyboard.

Press **[Apps] + O** (the letter O).



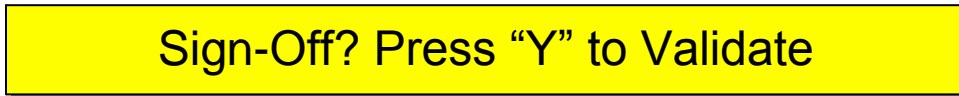
If using the mouse, **left-click on the [Stats]** Agent Shortcut Button in the lower-right corner of the screen.

After viewing statistics, click the **[Close]** button in the window or press the **[SELECT]** key on the keyboard.

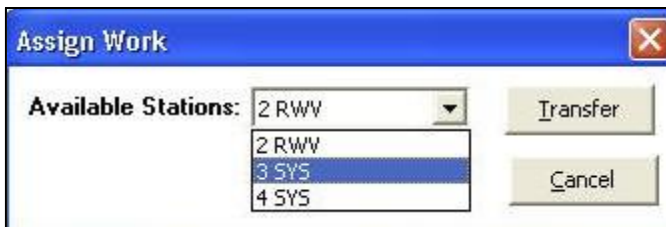
GETTING STARTED

SIGNING OFF FROM THE CONSOLE

Press the **[SN OFF]** key, or if using the mouse, click the **[On/Off]** agent shortcut button. A validation prompt will appear:



Type 'Y' to complete the 'Sign-off' sequence. The console will display an **Idle** state. If **pending work** exists, **assign work to an available console** selected from the drop-list presented.



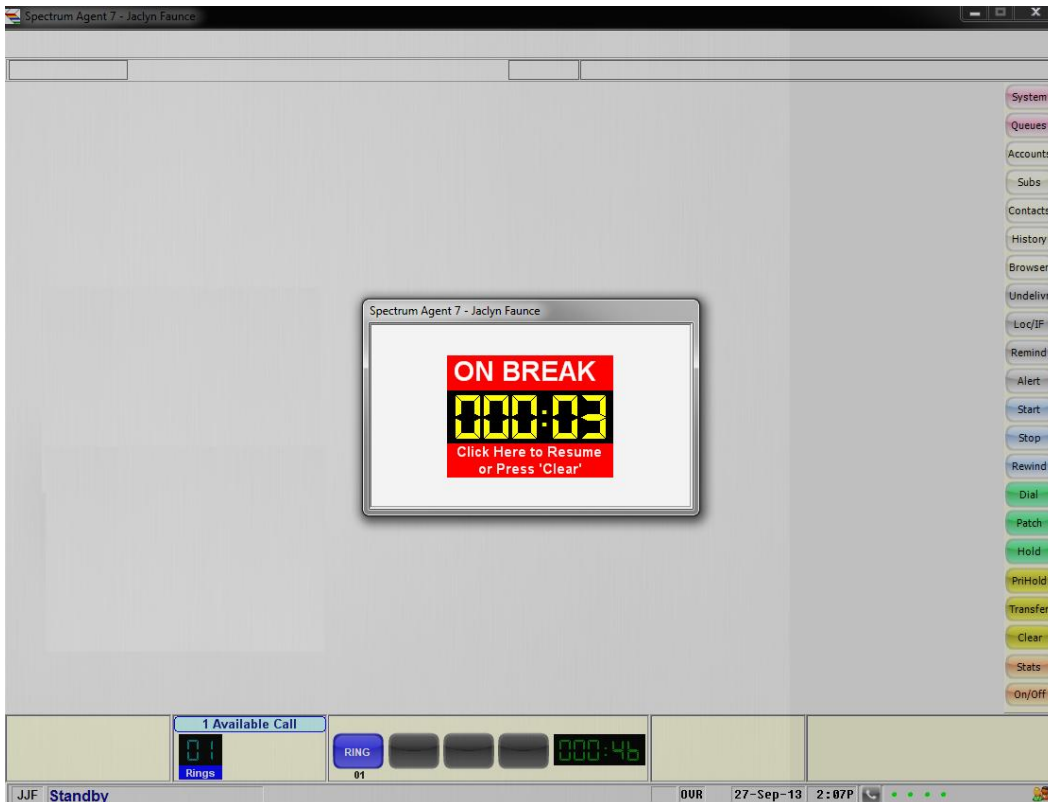
Then select 'Transfer'. All pending pages, transmit memos, reminders will be transferred to the selected agent/console.

BREAK MODE

Use **SIGN-OFF** to put the console in break mode.

Press **[ALT]+[SN OFF]**

Press **[CLEAR]** or click with the mouse below the timer to resume working.



GETTING STARTED

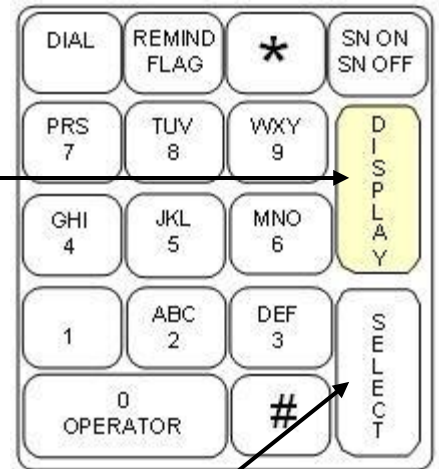
DISPLAYING AN ACCOUNT OR SUB-ACCOUNT

Display a Master Account, From the **Standby** state,

Press the **[DISPLAY]** key (on Numeric keypad).

Enter a **4-Digit** account number to display a master account.

*Note: Pressing the **down arrow** [↓] will move to next sequential master or sub-account, the **right arrow** [→] will move to the next sequential master, bypassing any sub-accounts.



Display a Sub-Account while viewing a Master Account

Press **[DISPLAY]** key

Enter the **1 or 2-digit sub-account number**, press **[SELECT]** to move to the sub-account.

Or use the Sub-Account Directory,

Press **[Apps] + A**. If using the mouse, select the **'Subs' agent shortcut button** to display the sub-account listing, if present.

Press the arrow [↓] keys to highlight the desired sub-account from the list, **or**

Type the first few letters of the desired sub-accounts' name; the search feature will highlight the first qualifying entry.

A - SubAccounts
D - Recent Call History
L - Call Queues
O - Stats
Q - Edit Alert
S - Search Directory
T - Transfer Call
W - Browser Window
X - Exit Menu

With a Sub-Account highlighted (Express Keystrokes):

Pressing **[DISPLAY]** will display sub-account still **WITHIN** the context of the **MASTER ACCOUNT**

Pressing **[Enter]** or **[SELECT]** will display that sub-account.

Pressing **[ENTER MSG]** will move to sub-account and present a **Message Ticket**.

Pressing **[Shift] + [ENTER IF]** will move to sub-account and present an **IF Message**.

Pressing **[DELIVER MSG]** will move to sub-account and initiate **Delivering Messages**.

Pressing **[Shift] + [DELIVER IF]** will move to sub-account and initiate **Delivering IF Messages**.

Pressing **[REDELIVER]** will move to sub-account and initiate **Redelivering Messages**.

Pressing **[Alt] + [REDELIVER]** will move to sub-account and access the list of **Retained Messages**.

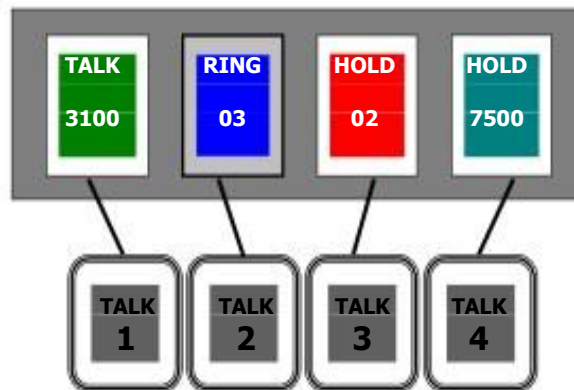
Pressing **[Tab]** or **[Esc]-[Esc]** (Esc twice) will exit the sub-account directory.

Select Sub-Account	
Amanda Butler, Atty	A 08
B J Grace, Atty	A 02
Beth Moore, Atty	A 11
Chris Hale, P.I.	A 04
Eric Janz, Atty	A 10
Kim Prevalet, Atty	A 06
Mark Morrow, Atty	A 05
Mark Scharpenburg, Atty	A 07
RETIRED Judge LA Hamilton	A 01
Sophia Joseph, Atty	A 03
Stephanie Boening, Atty	A 12
Venita Baker, Atty	A 09

INCOMING CALLS

ANSWERING A CALL

Press the [TALK 1-4] key then press [ANSWER] or click with mouse as the calls appear on-screen. With the answer phrase at the top of the console window, you are now ready to process the call.



Press the [CLEAR] key or the 'Clear' agent shortcut button to disconnect the call once the call is completed.

ANSWERING A CALL COLOR CODED RINGS

Spectrum Agent presents inbound calls to operators in a variety of colors (see picture above right). These colors represent codes for various types of calls. The following list describes the types of calls by their color, their type, and what word is used to describe them.

Dark Blue = Regular account inbound call (described as "Ring")

Light Blue = **Priority account** inbound call (described as "Ring")

Teal Blue = Announcement Hold, inbound call that has been placed on hold after first having an announcement played (described as "Hold")

Green = Inbound call that has been answered and is now live with the caller (described as "Talk")

Red = Any call that has been put on **Universal Hold** (available for anyone to pick it up) (described as "Hold")

Yellow/Gold = Priority hold (exclusive to the operator's station) or Transferred calls (passed from one operator to another) (described as "PHold" and "XFer")

Pink = Dialed, patched, or parked for patch setup calls (described as "Dial" and "Patch")

ACCOUNT ALERTS

An **Account Alert** may pop up at the Agent console when an inbound call is presented to the console, if configured. The Alert must be dismissed by the operator (by pressing the space-bar) before any further action can be taken. Alerts are designed to notify agents of special conditions related to the handling of calls for the programmed account.

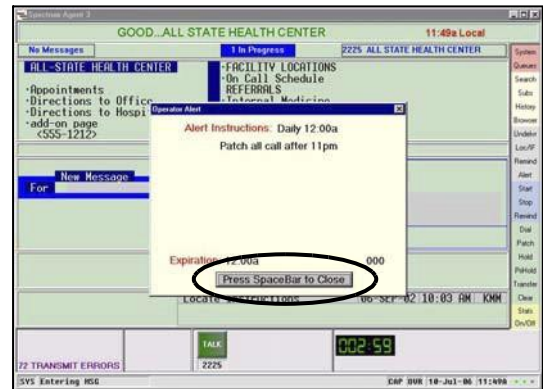
To Act on an Account Alert:

Press [**Spacebar**] to close the Alert window to proceed to call processing.

Two basic types of inbound Alerts can be defined.

Alerts for a Specified Period - To define an Alert with a specific starting and expiration date and time, enter the dates and times, then leave the 'Daily Alert Control' portion unchecked. The Alert will be presented for all inbound calls for the specified period.

Daily Alerts - An Alert can be defined to pop up during a specified daily time period by checking the "Alert will occur daily in the 'time-of-day' specified above" checkbox. Then check each day for which the Alert is relevant. If this mode is chosen, the 'Start' and 'Expiration' dates are ignored and only the times-of-day are observed. For example, if the Alert is to be presented from 8am to 5pm, put 8am as the starting time and 5pm as the expiration time. If the Alert is to be presented from 11pm to 8am, put 11pm as the starting time and 8am as the expiration time.



PLACING A CALL ON UNIVERSAL HOLD (3 OPTIONS)

Placing a call on **Universal Hold** will make that call available to be picked up by all agents. The "Talk" key will then change to the color **RED**. **There are 3 different methods available to place a caller on UNIVERSAL HOLD.**

To place current caller on hold to answer another incoming call

1. Manual (keystroke) Method

Press the [**HOLD**] key. This will place the current caller on hold.

2. Agent Shortcut Button (mouse) Method

First, select the '**Hold**' **agent shortcut button** by clicking on it with the mouse. This will place the current caller on hold.

Next, press a [**TALK 1-4**] key for a **dark blue/light blue/teal blue** "Ringing" Activity Window and press the [**ANSWER**] key.

3. Automatic (keystroke or mouse) Method

Press another [TALK 1-4] key (or click on another [TALK 1-4] key with the mouse) for the **dark blue/light blue/teal blue** "Ringing" Call Activity Window. This places the current caller on hold and answers the incoming call with one keystroke.

PLACING A CALL ON PRIORITY (EXCLUSIVE) HOLD (RECOMMENDED)

Placing a call on **Priority (Exclusive) Hold** will make that call available only to the agent that initiated the Hold. A Console can have up to 4 Priority Hold or Transferred Calls at once. **There are 3 different methods available to place a call on PRIORITY HOLD.**

To place the current caller on hold exclusive to your console (call will not be available to other agents), you may:

1. Manual (keystroke) Method

Press the [Shift]+[HOLD] or [Alt]+[HOLD] keys

2. Agent Shortcut Button (mouse) Method

Use the mouse to select the 'PriHold' Agent Shortcut Button, this places the caller on hold at your console only.

3. Secondary (mouse) Method

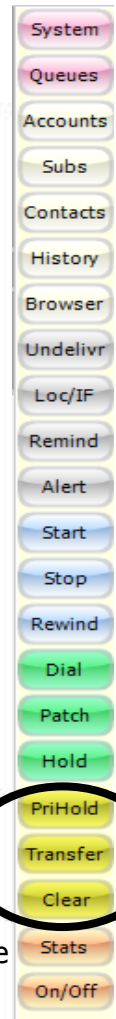
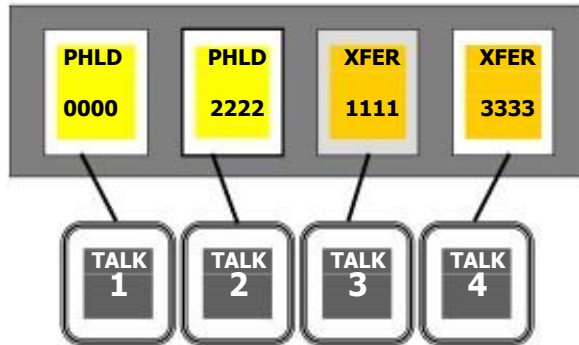
Use the mouse to **double-click the active 'Talk' window**

To Pickup Calls on Priority Hold:

Press the [TALK 1-4] key **ONCE** of the "PHLD" (Priority Hold) Call Activity Window to **FIRST** bring up the account information, or if using a mouse, click the "PHLD" activity window to access the account information.

Press the [TALK 1-4] key **A SECOND TIME** to proceed with the call, or use your mouse to click on the "PHOLD" activity window a second time.

-OR- Press the [TALK 1-4] keys twice and then the [ANSWER] key, if Answer-On-Trunk-Select is NOT enabled (not recommended) and proceed with the call.



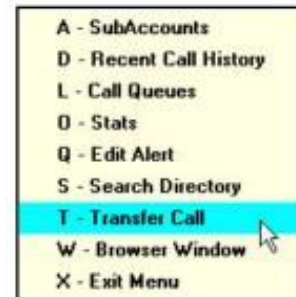
TRANSFERRING A CALL

To transfer a caller to another agent console:

Press [**Apps**] **+T** on the keyboard. If using the mouse, select the '**Transfer**' agent shortcut button.

Enter "0" plus the 1-digit number of the console to which you wish to transfer the call (unless the console number already is a 2-digit number).

(Ex: Console 2 would be entered as "02". Console 22 would be entered as "22".)



To Access a Transferred Call:

Press the [**TALK 1-4**] key **ONCE** on the "**XFER**" (Transfer) Activity Window to **FIRST** access account information or, if using the mouse, click the "**XFER**" activity window to access the account information.

Press the [**TALK 1-4**] key **A SECOND TIME** to proceed with the call, or use your mouse to click on the "**XFER**" (Transfer) activity window a second time.

-OR- Press the [**TALK 1-4**] keys twice and then press the [**ANSWER**] key, if Answer-On-Trunk-Select is NOT enabled, and proceed with the call.

DISPLAYING THE LIST OF CALLS HANDLED

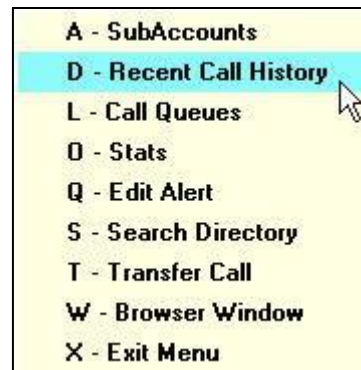
System has the ability to save the **last 500 calls** handled by a particular agent during a session. A call list can be accessed displaying the accounts and the time the calls were answered.

From the "Standby" state:

Press the [Apps] +D keys to display the **Recent Call History** or last 500 accounts active calls, either incoming or holding. If using the mouse, select the '**History**' agent shortcut button.

Press an arrow [↓↑] key to move to desired account, then press [SELECT] or click on desired account using the mouse.

Just like most of the lists in the Spectrum Agent, the oldest call appears first; the newest account call appears last in the list.



Note - Color Codes:

Blue entries represent answered calls.

Amber entries represent accounts that were displayed once the call was answered.

Red entries indicate calls that were picked up off of hold.

Magenta entries indicate a dial-out.

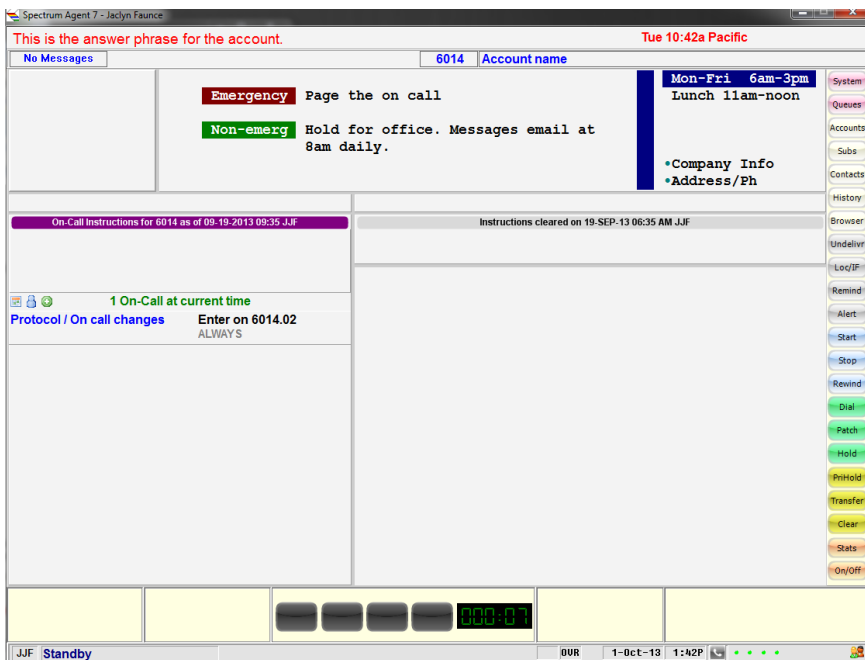
Grey entries indicate an account that was [DISPLAY]'ed from the Agent Console.

Time	Number	Account Name
3:16P	2225	ALL STATE HEALTH CENTER
12:31P	2225	ALL STATE HEALTH CENTER
12:30P	2225	ALL STATE HEALTH CENTER
12:27P	2225	ALL STATE HEALTH CENTER
12:24P	2225	ALL STATE HEALTH CENTER
12:22P	2225	ALL STATE HEALTH CENTER
12:22P	2225	ALL STATE HEALTH CENTER
11:46A	2225	ALL STATE HEALTH CENTER
9:58A	3333	PALACE PARK REALTY
9:57A	3333	PALACE PARK REALTY
9:56A	3333	PALACE PARK REALTY
9:41A	3333	PALACE PARK REALTY
9:41A	3333	PALACE PARK REALTY
9:40A	3333	PALACE PARK REALTY

Information Screens

USING HYPERTEXT COMMANDS

With an Information Screen displayed on-screen, to highlight a bulleted Hypertext prompt:



Press **[Shift]+[SELECT]** to activate the Hypertext prompt, or click once on the screen.

Use the arrow **[↔]** keys to move to the desired prompt

Press **[SELECT]** again and the command(s) will be executed.

If using a Mouse:

CLICK ONCE on the screen to activate the Hypertext Prompt on screen. A thin bright border will appear around the Information Screen Area

POINT AND CLICK on the desired command, this will select and execute that Hypertext command.

You will be unable to highlight any Hypertext prompt that cannot be executed from the current console "State".

Hypertext Prompts will perform one or more operations...



Possible hypertext operations

- Go to or view a particular information screen
- Go to or view a particular account or sub-account
- Speed-dial a phone or pager number
- Speed-dial an alphanumeric terminal & pager
- Select a particular free-form message template
- Insert Keystrokes into a message or page ticket
- Open Web Browser to a particular website or page
- Enter Locate Instructions information and/or clear it
- Send Text Messages to Cell Phones or PDA's
- Email messages or email group messages
- Select a particular Scripting message template

ENTERING DATA

ENTERING A MESSAGE

Answer a call or display an account:

Press the [**ENTER MSG**] key or select appropriate Hypertext Prompt.

This is a screen, not all accounts have them. If a screen appears, you need to read it because it will have very important information.

Script tips

Use **SELECT** to navigate through the fields.

When in a picklist, use the up and down arrows then press select to choose an option.

Name:

Phone:

Message:

For:

File message

This is a pick list.

Fill in appropriate fields, press [**SELECT**] key to advance through fields.

When in a pick list, use the up and down arrows to navigate and then press select to choose an option. A pick list can be programmed to take actions for you.

Press [**SELECT**] when on  to file the message on the account.

To escape from an unwanted Message:

Before [**FILE**]ing a message, press [**Esc**] twice and "**C**" to **cancel** when prompted. This feature can be enabled or disabled system-wide.



COPYING A MESSAGE TO ANOTHER ACCOUNT

Messages can be manually or automatically copied into another master or sub-account. When auto-copy is enabled on the AMR, a message can be automatically copied to a target account upon the agent **pressing the [FILE] key**.

To manually copy a message

From either the "**Delivering message**" or "**Redelivering message**" state:

Press [**ALT**] + [**COPY**], "**Copying**" prompt will appear.

Enter a **target** 4-digit master or 2-digit sub-**account number** to copy to.

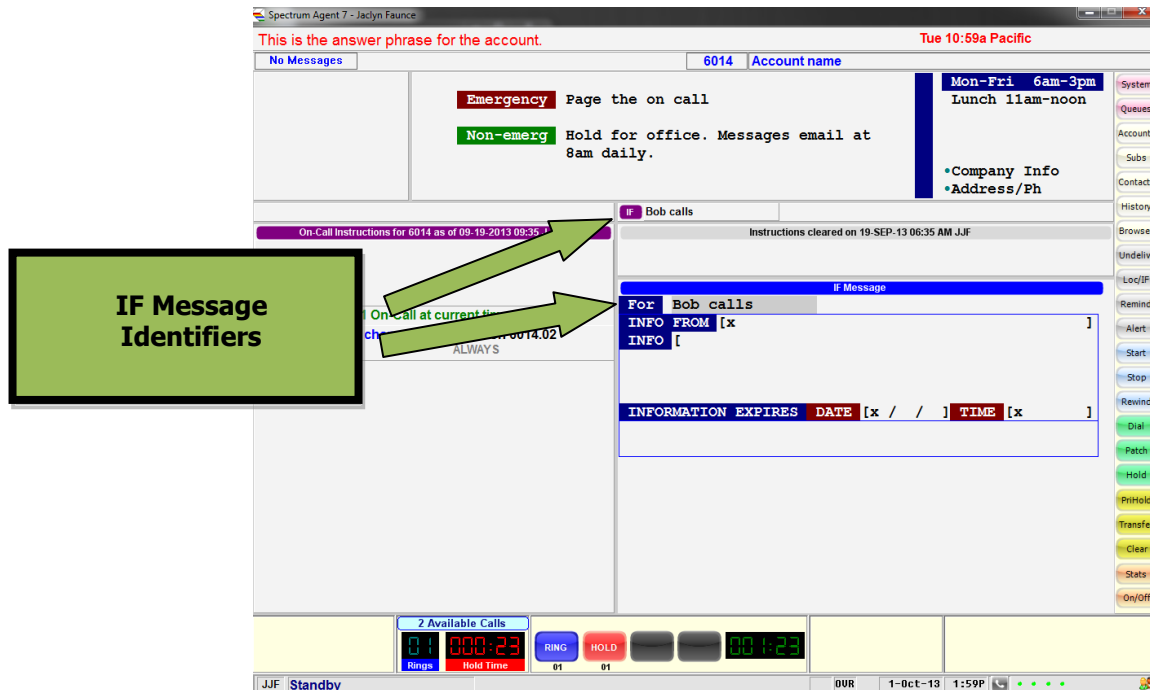
Press [**FILE**] to **complete**, the message is copied to the target account in the "**Entering Msg**" state, the message can then be modified and [**FILE**]d when complete. **If an error is made, press [Esc] twice to cancel the message.**

ENTERING DATA

ENTERING AN "IF" MESSAGE

An "IF" Message allows a client to leave a message for a specific caller when he/she calls the service.

Answer a call or display an account: Press the **[Shift]+[ENTER IF]** keys.



Fill in fields on the **IF** Message ticket.

Press the **[FILE]** key and **[CLEAR]** key, if needed. Note the **IF** Message area in purple.

To escape from an unwanted IF Message:

Press **[Esc]** twice and "**C**" to **cancel** when prompted.

USING MNEMONICS

Mnemonics are keys that represent commonly used words and phrases and can be used during any data-entry state.

Press the **[ALT] + LETTER key** on the keyboard corresponding to the desired standard mnemonic.

Processing of Mnemonic keys has been disabled in contexts in which they would have no meaning, for example, in the "Signing-on" state.

Examples:

- [ALT] + R** = Returned Your Call
- [ALT] + W** = Will Call Back
- [ALT] + P** = Please Call
- [ALT] + G** = Gone for the Day
- [ALT] + 0 - 9** = Customizable Mnemonics (see list on next page)

Mnemonics List

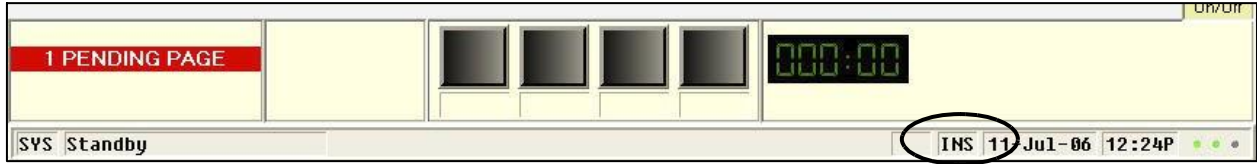
Mnemonic Editor ✖

A <input type="text" value="asap"/>	N <input type="text" value="no answer"/>	1 <input type="text" value="Closed until"/>
B <input type="text" value="DB to hospital"/>	O <input type="text" value="on call"/>	2 <input type="text" value="Monday"/>
C <input type="text" value="cancel"/>	P <input type="text" value="please call"/>	3 <input type="text" value="Tuesday"/>
D <input type="text" value="DB to CC"/>	Q <input type="text" value="calling to cancel"/>	4 <input type="text" value="Wednesday"/>
E <input type="text" value="emergency"/>	R <input type="text" value="returned your call"/>	5 <input type="text" value="Thursday"/>
F <input type="text" value="fast busy"/>	S <input type="text" value="to reschedule"/>	6 <input type="text" value="Friday"/>
G <input type="text" value="Gone for the day"/>	T <input type="text" value="deliver w/other"/>	7 <input type="text" value="Saturday"/>
H <input type="text" value="Hold for the hour"/>	U <input type="text" value="eft msg to call ans svc"/>	8 <input type="text" value="Sunday"/>
I <input type="text" value="Info not needed"/>	V <input type="text" value="office"/>	9 <input type="text" value="Available"/>
J <input type="text" value="Hold for office"/>	W <input type="text" value="will call back"/>	0 <input type="text" value="Unavailable until"/>
K <input type="text" value="Booked appointment"/>	X <input type="text" value="Ask ofc for on call"/>	
L <input type="text" value="At lunch until 1:15"/>	Y <input type="text" value="n/a"/>	
M <input type="text" value="appointment"/>	Z <input type="text" value="on pager"/>	

ENTERING DATA

INSERTING AND OVERWRITING TEXT

By default, text is entered in the "OVR" (Overwrite) mode at agent consoles. When the cursor is placed at the beginning of a word or sentence, text typed will overwrite the existing text.



An agent can press the [INSERT] key to switch to the Insert "INS" mode. From the cursor, new text will be inserted and existing text will shift to the right. To return to the "OVR" mode, simply press the [INSERT] key again. The "OVR" prompt re-appears.

CREATING / EDITING / DELETING SPECIAL LOCATE INFORMATION

The **Special Locate** area holds up 108 characters of **short-term information** for an account that is directly related to handling calls for that account.

To Create or Edit current Special Locate Information

Answer a call or display an account then,

Press the [EDIT LOCATE] key. Enter the new/current locate information.

Press the [FILE] key then the [CLEAR] key, if needed to disconnect a caller. The Locate Instructions **border will now appear purple**.

To Delete Special Locate Information

Press and hold down the [Shift] key then press the [DELETE LOCATE] key **twice to delete** Special Locate information.

CREATING / EDITING / DELETING EXPANDED LOCATE INFORMATION

An **Expanded Special Locate** Instructions area (ELI) can be accessed, providing an additional 431 characters to input more information relating to Special Locates.

To Display and Create an ELI

Press [DISPLAY] then [EDIT LOCATE], to display ELI area or press the **Asterisk key [*]** on the numbers pad.

Press [Alt]+[EDIT LOCATE] to enter the "Editing ELI" state.

Enter the information with mixed-case text and screen attributes:

[Alt]+B before and after text to **highlight** text in **BLUE**

[Alt]+G before and after text to **highlight** text in **GREEN**

[Shift]+6 before and after text to **FLASH TEXT**

[Alt]+R before and after text to **highlight** text in **RED**

ENTERING DATA

Display and Create an ELI (cont.)

Press **[FILE]** to save the ELI, **a green border** will appear in the Locate Instructions area.

Press **[DISPLAY] + [SELECT]** to return to the Master Account's main Information Screen.

Delete current Expanded Locate Information

While in the "Standby" state,

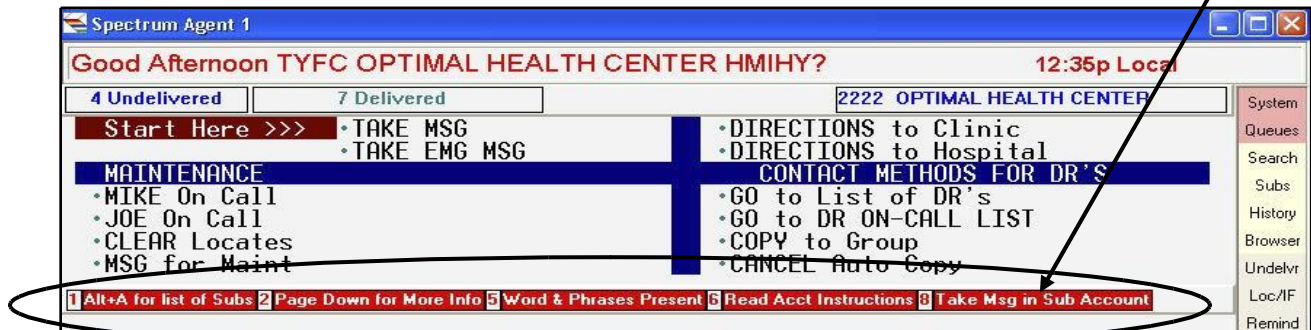
Press the **Asterisk key [*]** or **[DISPLAY] + [EDIT LOCATE]** to display Expanded Locate Information (ELI). **The Asterisk cannot be used while in "Entering Message" state, otherwise, an 'asterisk' will be entered in a message field instead of displaying the ELI. [DISPLAY] + [EDIT LOCATE] needs to used.**

Press **[Ctrl]+[Delete]** to clear the ELI; then press "Y" to **confirm** the deletion.

The ELI stamp will be updated and the green border prompt will be removed from the Locate Instructions area.

DISPLAYING/REMOVING FLAGS

Flags serve to reinforce material on the account's Information Screen. There are 8 system-wide Flags that are pre-programmed, and when activated will appear in red for high visibility just below the Information Screens area. Creation of Flags is in the System Configuration TAB of the Spectrum Data Manager's Setup Menu option.



With an account on screen,

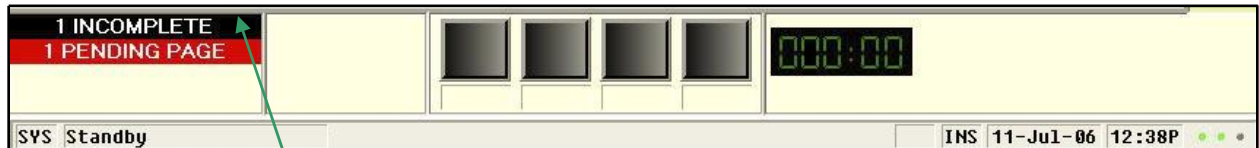
Press the **[FLAG]** key; enter a **single digit # (1-8)** of the flag you want to display. **REPEAT** procedure to **REMOVE** Flag from screen.

ENTERING DATA

ACTING ON THE "INCOMPLETE" MESSAGE PROMPT

There is a pre-defined limit on the number of incomplete messages that the system will buffer on a system-wide basis. When "Incomplete" messages are present a prompt will flash in black in the pending area denoting the total number of incomplete messages residing at that console. Incomplete messages can occur if an agent, while entering a message, answers an incoming call before **[FILE]'**ing the current message.

An Incomplete message can also be created by pressing the **[SAVE]** key while in the "Entering Msg" state before the **[FILE]** key is pressed. This "forces" your work to your Incomplete stack, so that you can return to "Standby" state for the next task.



When the "Incomplete" message prompt flashes, from "Standby,"

Press the **[Esc]** key **twice**, complete any work on the **Incomplete** ticket.

Press the **[FILE]** key to complete the message, press **[Esc]** **twice** to display the next **Incomplete** message.

Repeat until all **Incomplete** tickets are **[FILE]'**d.

-Or- use your mouse to double-click on the black flashing INCOMPLETE pending work prompt.

To Flip Thru the Incomplete Message Stack:

Press **[Esc]** **twice** to display the first **Incomplete** message.

Press **[SAVE]** to place current message on bottom of incomplete stack.

Press **[Esc]** **twice** to display the next incomplete message.

Press the **[SAVE]** key again to place message on bottom of stack.

Repeat above steps until the desired **Incomplete** ticket is displayed.

Dispatcher's Receive Page Tickets in the form of Incomplete Messages:

When Dispatching stations and/or Operators are set up in the SDM, the first operator takes a message and if dispatching is necessary, once the **[FILE]** key is pressed, the resulting Page Ticket appears on the Dispatcher's console as an **Incomplete** message

Press **[Esc]** **twice** to display the first **Incomplete** message.

Press **[SAVE]** to place current message on bottom of incomplete stack.

Note: If an account is given Priority status in the Spectrum Data Manager's Account Master Record: Basic Info TAB, not only will the priority be given to the incoming calls, but also the order that the Incomplete Message Stack is

USING THE SAVE KEY TO EDIT MESSAGES

The **[SAVE]** key can be used to add/edit information on a Message ticket, re-direct a message to another person (change the "For" field), or to force a ticket on to the Incomplete Message stack. Modified messages are placed on the Saved Messages List (if enabled in the AMR).

From the **"Delivering Msg"** state:

Press **[SELECT]** key to display the desired message.

Press the **[SAVE]** key to re-open the message ticket, the cursor will appear in the "For" field.

Make necessary changes to the message ticket.

Press **[FILE]** when editing is complete.

The message will be marked with **Modified: JJF** indicating that the message has been modified.

Undelivered Messages 1 of 3	
Office Name :	01-OCT-13 11:31 AM JJF
Office Name :	01-OCT-13 11:31 AM JJF
Jackie Name :	01-OCT-13 11:31 AM JJF

Undelivered Messages 1 of 3	
Office Name : Caller name Modified: JJF	01-OCT-13 11:31 AM JJF
Office Name :	01-OCT-13 11:31 AM JJF
Jackie Name :	01-OCT-13 11:31 AM JJF

VIEWING THE SAVED MESSAGES LIST

As changes or modifications are made to messages, SDM retains a copy of the original message (before changes were made) on the Saved Message List. This feature can be enabled/disabled on a per account basis. Enable the list if you wish your operators to view it on their Agent console, otherwise, it is only viewable from the SDM.

To view the Save Messages List

Press **[CTRL]+[ALT]+[DELIVER MSG]** keys, the console will change to the **"Reviewing Saved Msgs"** state and a similar list will appear:

Taken	01-OCT-13 11:31 AM	Saved	01-OCT-13 11:32 AM
Opr	JJF	Page	1 of 1
		Opr	JJF » SAVED MESSAGE

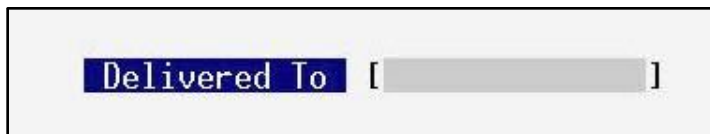
Use the arrow **[↕]** keys to move to and **[SELECT]** desired message. (Or **[Home]** and **[End]**).

MESSAGE DELIVERY

USING THE "DELIVERED-TO" FIELD

If enabled on the AMR, every message for an account that is Delivered and **[FILE]'d** will have a **"Delivered-To"** name attached. **If this has been enabled, then a Name has to be entered here if messages are to be [FILE]'d, otherwise, the system will NOT ALLOW messages to be [FILE]'d off the list.**

Press **[DELIVER MSG]**, the **"Delivered-To"** field will appear. Enter the **"Name"** of the person calling to retrieve messages.



Press **[SELECT]** to access Undelivered message list.

DELIVERING MESSAGES TO AN ACCOUNT

Answer a call:

Press the **[DELIVER MSG]** key. The console will change to the **"Selecting Msg"** state and a list similar to the following will appear:

Undelivered Messages 1 of 3	
Office Name :	01-OCT-13 11:31 AM JJF
Office Name :	01-OCT-13 11:31 AM JJF
Jackie Name :	01-OCT-13 11:31 AM JJF

Press the arrow **[↔]** keys to move cursor to desired message. **[Home]** moves to oldest message on list, **[End]** moves to newest.

Press the **[SELECT]** key and message will appear on screen. Relay messages to caller.

If necessary, press the **[SELECT]** key again, and use the arrow **[↔]** keys to view any attached Page Tickets.

To Change "Delivered-To" Name once Session is Initiated:

Press **[DELIVER MSG]** again, the original "Name" entered appears.

Enter new **"Name"** and press **[SELECT]**.

Press the **[FILE]** key to **deliver** the message **or** the **[Esc]** key **twice** to **Hold** the message on the Undelivered message list and return to **"Delivering MSG"**.

Press the **[CLEAR]** key to disconnect the call.

Multiple Message Delivery:

Answer a call:

Press the **[DELIVER MSG]** key.

Use the arrow **[↔]** keys to move to and **[SELECT]** desired message. (Or **[Home]** and **[End]**). Relay the message to the caller.

Press **[FILE]** to **Deliver** message and/or press **[ESC]** key **twice** to return to **"Delivering MSG"** state.









Use the arrow **[↔]** keys to move to another message. Repeat until all messages are delivered.




MESSAGE DELIVERY



INBOUND EMAIL, INBOUND SMS, AND INBOUND WEB MESSAGES

The text portion of qualifying Inbound Email, SMS or Web Messages sent by clients is converted to free-form messages sent to the designated account with 'Inbound Email', 'Inbound SMS', and/or 'Inbound Web Msg' in the 'FOR' field. It is then routed as an 'Incomplete Message' to an agent based on the currently established Dispatching criteria. Then the agent is free to take action based on the needs of the Incomplete Message on the account.

The 'From' field contains the 'Web Messages' User Name of the client that sent the message. Below is an example of inbound messages after they have been filed.

Delivered Messages 127 of 133	
 INBOUND EMAIL From: message@elynxtech.com	02-OCT-13 06:35 AM ELK 
 INBOUND EMAIL From: message@elynxtech.com	02-OCT-13 06:39 AM ELK 
 INBOUND EMAIL From: message@elynxtech.com	02-OCT-13 06:44 AM ELK 
 INBOUND EMAIL From: message@elynxtech.com	02-OCT-13 07:14 AM MLC 

Delivered Messages 84 of 93	
 INBOUND WEB MSG From: mallison	01-OCT-13 08:13 AM SAM  

Delivered Messages 30 of 31	
 INBOUND SMS From: 8146712377 Holly Weaver	01-OCT-13 02:28 PM SAM 

To access the list of **Inbound Messages** from the **Undelivered Messages List**:

Press the **[IF/DELIVER MSG]** key.

From the **"Delivering MSG"** state:

Press the arrow **[↔]** keys to get to the desired **Inbound Message**.

Press the **[SELECT]** key, relay message to caller.

Press the **[FILE]** key, **or** the **[Esc]** key **twice** to de-select the message and use arrow keys and then the **[SELECT]** key to select another **Inbound Message**.

Press the **[FILE]** key to complete the **"Delivering MSG"** process and return console back to **Standby** state.

DELIVERING IF MESSAGES

To access the list of **IF Messages**:

Press the **[SHIFT] + [IF/DELIVER MSG]** keys.

From the **"Delivering IF"** state:

Press the arrow **[↔]** keys to get to the desired **IF Message**.

Press the **[SELECT]** key, relay message to caller.










Press the **[FILE]** key, **or** the **[Esc]** key **twice** to de-select the message and use arrow keys and then the **[SELECT]** key to select another **IF Message**.

Press the **[FILE]** key to complete the **"Delivering IF"** process and return console back to **Standby** state.

MESSAGE DELIVERY


REDELIVERING A MESSAGE















Agents may view Delivered messages until these messages have been purged from the system or retained to the Retained Messages List. Redelivering a message allows the agent to view delivered messages while they remain on the Delivered list.


Delivered Messages		12 of 12
	LOCATE	01-OCT-13 11:24 AM JJF
	Office Name: Caller name	01-OCT-13 11:31 AM JJF
		
	Office Name:	01-OCT-13 11:31 AM JJF
	Jackie Name:	01-OCT-13 11:31 AM JJF
	Office Name: John Doe	01-OCT-13 11:59 AM JJF 
	Office Name: Jane Smith	01-OCT-13 12:00 PM JJF 

Answer a call or display and account:

Press the **[REDLVR]** key. Delivered Message list will appear.

Use the arrow  keys to move cursor to desired message. **[Home]** moves to oldest message on list, **[End]** to most recent message, press the **[SELECT]** key to display and/or relay the message. The large blue text lists who the message was for, and the following symbols indicate the type of ticket:

	Inbound Email, SMS, or Web Message		Page tickets attached to message
	The original of a message that has been saved or edited with oper. init.		A Special Locate that was edited or deleted
	Message Reviewed and marked with oper. init.		A Patch ticket
	A Faxed message		A Dispatch ticket
	A message transmitted to an Alpha Pager		A System Reminder down-filed
	A message sent to an email address		IF message was delivered
	A message sent to a cell phone via SMS		A Voice Recorded message
BLANK	Message was manually delivered and not transmitted in any fashion.		

Press an arrow  key to move to another message, if desired, press the **[SELECT]** key. Repeat to display other messages.

Press the **[CLEAR]** key to disconnect caller, if necessary, press the **[Esc]** key **twice** to return to "Standby" state.

Note: If "000" appears as the agent ID on the Delivered Agent/ Time/ Date stamp, the message was transmitted to an account during a Scheduled Delivery.

MESSAGE DELIVERY

UNDELIVERING A MESSAGE

It is possible to move a message from the Delivered Message list and return it to the Undelivered Message list.

Answer a call or display an account:

Press the **[REDLVR]** key.

Use the arrow **[↕]** keys to move cursor to desired message.

Press the **[SELECT]** key.

Press the **[SHIFT] + [UNDLVR]** key.

Press the **"Y"** key to validate. The message is returned to the account's Undelivered list. Often, once a message has been Undelivered, the **[SAVE]** key (used for editing the message) is used to change the **"For"** field on the message, to redirect it to its new recipient.

Press the **[Esc]** key **twice**.

Press the **[CLEAR]** key, if needed.

When the undelivered message is **[FILE]**'d again, the message will be **NOT** updated with a new Delivered Agent/Time/Date stamp.

Note: Only messages and IF messages can be undelivered. If the message was originally Paged, the Page tickets will still be attached. Locates, Dispatch tickets, Patch tickets and/or Reminders cannot be Undelivered.

ACCESSING RETAINED MESSAGES

Agents have access to 45 days worth of retained message for accounts. Each account can automatically have its delivered messages moved to the "Retained" area for long-term storage. An agent can access these messages for an account with a caller on-line or not and they can also manually transmit them individually.

With an account active on screen:

Press the **[Alt]+[REDLVR]** keys simultaneously, the most recent date with Retained message for the account will appear along with the number of message retained for the account on that particular day.

Enter the desired search date or use arrow **[↕]** keys to move to different date, press **[SELECT]** key to view the most recent message for selected date.

Press **[SELECT]** again and use arrow **[↕]** keys to view Page Tickets.

Press **[Esc]** **twice** to return to **"Retained Message"** state.

Press the **down arrow** to move to older messages for that date, and eventually on to messages from previous dates, or the **up arrow** to move to more recent messages.

Press the **[Esc]** key **twice** to get back to the **"Standby"** state.

MESSAGE DELIVERY

BOARD CHECKS #1: SEARCHING FOR UNDELIVERED MESSAGES (SEE STATUS SCREEN REPORTS ALSO)

Consoles may be enabled by management to search for accounts with **Undelivered messages**. Once located, the undelivered messages can be reviewed to ensure they were processed correctly.

From **"Standby"** state and blank screen:

Press the **[CTRL] + [DELIVER MSG]** keys, or, if using the mouse, select the **'Undelivr' agent shortcut button**. The first account with Undelivered, non-reviewed messages will appear.

Press **[DLVR MSG]** to review the messages.

Press **[ESC] twice** to return to **"Standby"**. Repeat to search for the next sequential account with undelivered messages.

BOARD CHECKS #2: SEARCHING FOR UNDELIVERED IF MESSAGES AND NON-BLANK LOCATES (SEE STATUS SCREEN REPORTS ALSO)

Consoles can also be scanned to present accounts with either an **IF message or non-blank Special Locate Instructions area**. This includes Expanded Locates.

From **"Standby"** state and blank screen:

Press the **[CTRL] + [SHIFT] + [DELIVER MSG]** keys, or, if using the mouse, select the **'Loc/IF' agent shortcut button**. The first account with an IF messages and/or non-blank Locates will appear. Repeat to search for the next sequential qualifying account. Press **[ESC] twice** to return to **"Standby"**.

REVIEWING MESSAGES

At a single pre-determined Console with an active account on screen:

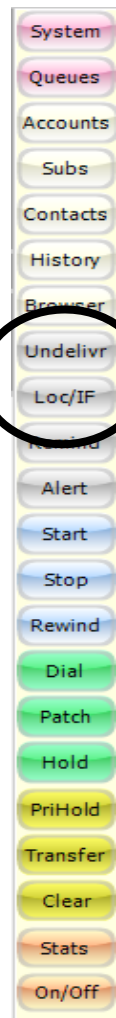
Press the **[DELIVER MSG]** key.

Press an arrow keys to move to desired message. Press the **[SELECT]** key to display the message.

Press the **[ENTER MSG]** key. In the Undelivered message list the message will be marked with **Reviewed: JJF**.

Repeat to review remaining messages.

Press **[Esc] twice** when finished.



Undelivered Messages	
1 of 2	
Office Name: John Doe	01-OCT-13 11:59 AM JJF Pg Reviewed: JJF
Office Name: Jane Smith	01-OCT-13 12:00 PM JJF Reviewed: JJF

MESSAGE DISPATCHING

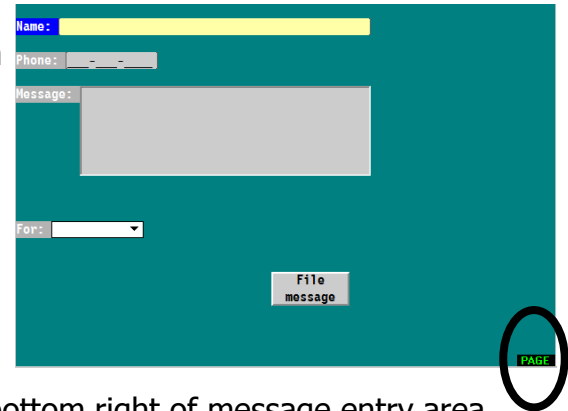
RELAYING A MESSAGE USING A PAGE TICKET

Page tickets document attempts to relay a message to a client and can be automatically or manually initiated. Page tickets remain attached to the Message ticket and provide information about each relay attempt. Up to 99 page tickets can be attached to a single message.

To initiate a **Manual Page**, answer a call or display an account:

Press **[ENTER MSG]** key. Fill in fields.

Press **[PAGE]** key. Note green **"PAGE"** prompt at bottom right of message entry area.



Note: The **[PAGE]** key acts as a toggle switch to turn the prompt on and off. If pressed again, a prompt will appear, **"Press Y to REMOVE PAGE"**, so a Page ticket may be canceled.

Press "Y" to REMOVE PAGE

Press the **[CLEAR]** key to disconnect caller.

Press the **[FILE]** key when the message ticket is complete, a Page ticket will appear.

Page:	1	Office	
Type:		Repeat:	AR: Phone:
Pid:		TID:	SID:
EAdr:			
Result:			

- If desired, activate the Hypertext prompt in on call scheduler by clicking the screen or pressing **[ALT] + [SELECT]**. Select appropriate contact.

Complete the Page Ticket. Enter the **Type**, **Rpt** (repeat minutes), **AR** (attempts remaining, if a particular number of attempts are required).

Be sure to include information in the Result field.

The phone & pager numbers dialed will appear in the **Phn#** field, Alphas/texts appear in the **Alpha** & **TID** (terminal ID) fields, email messages appear in the **Email** field. Press the **[FILE]** key, when finished.

Page tickets may be pre-populated with the **Type** and any **Repeat intervals** or **Attempts** desired. The **Rpt** and **AR** fields will also display the time and attempts remaining if the Page ticket is viewed from the Pending Pages list before any timers have expired.

PAGE TICKET (ACTION REPORT) TYPES

W	<u>PHONE RELAY WITH CONTACT</u> Use this when you have delivered the message, and will move from the Undelivered List to the Delivered List. MUST have result field entered. Down-files to the Delivered Message List.
R	<u>REPEAT OUT-DIAL</u> Usually to a Digital Pager, but can also be used with a phone number that you want to try again in a few minutes. MUST have Repeat Interval and result field entered, AR is optional. Will appear on both the Undelivered Messages and Pending Pages Lists.
A	<u>ALPHA PAGER / EMAIL / TEXT MESSAGE</u> Use if a Call Back IS REQUIRED from the contact, to validate that they have received the message (especially important in EMERGENCY MESSAGE situations). MUST have Repeat Interval and AR if desired. Will appear on both the Undelivered Messages and Pending Pages Lists.
F	<u>ALPHA PAGER / TEXT MESSAGE TO CELL</u> Use if a Validation Call Back IS NEVER NEEDED. Down-files to Delivered Message List.
E	<u>EMAIL</u> Use if a Validation Call Back IS NEVER NEEDED. Down-files to Delivered Message List.
*	Disregard OR Cancel Page (erroneous) does not count in account totals, but doesn't allow for dispatching Retries. Will appear on the Undelivered Messages List.
0-9	<u>TRANSMIT SCRIPT</u> Pre-programmed to either downfile or hold with Undelivered Messages. If another action is needed, it will appear on both the Undelivered Messages and Pending Pages List. If no call back is required, it will downfile and move to the Delivered Messages List.
C	System automatically inputs this. When initiating a new out-dial on a page ticket that has already documented an out-dial, the system will force a new page ticket with this type. Use when you've called the first number and recorded the info in the first Page ticket, but now you need to dial a second number (Ex: Call doctor at office, if NO answer, dial him at home). Just pressing the [DIAL] key a second time in the "Entering Page" state will enable the system to force a new Page ticket to attach.

ACTING ON THE "PENDING PAGE" PROMPTS

A solid red "**Pending Page**" prompt will appear in the Pending area to indicate to agents how many Page ticket(s) are awaiting response from clients. When a timed Page ticket has expired, the repeat time has elapsed, and the account has not called in to retrieve the message or when an automatic Fax, Alpha, Text or Email transmission has failed, the "**Pending Page**" prompt will begin to flash. This is an indicator that alerts Agents that there are pending pages that require attention.

From the "Standby" state and a blank screen:

1. Re-paging a Dial-Out (Phone # or Digital Pager #)

- a. Press the **[PAGE]** key to view the **Pending Pages** list.
- b. Press the arrow keys (to move to highlighted Page ticket). Press the **[SELECT]** key to display the desired page ticket.
- c. Press **[ALT]+[SELECT]** to access the on call scheduler and choose the correct contact.
- d. Press select to dial the phone or Pager number (wait for audible "beep" that signals to manually or speed-dial the call back number too, if necessary).
- e. Press the **[CLEAR]** key when the Dial-out is complete.
- f. Fill in **Page Type** fields (W, or R); include Rpt Interval for "R" types only. Enter **Result** field and then press the **[FILE]** key.

MESSAGE DISPATCHING

ACTING ON THE "PENDING PAGE" PROMPTS (OPTIONS CONT.)

2. Retransmit Page (For Alpha Pagers, Email, & Text Messages)

- a. Press the **[PAGE]** key to view the **Pending Pages** list.
- b. Press the arrow keys (to move to highlighted Page ticket). Press the **[SELECT]** key to display the desired page ticket
- c. Press the **[PAGE]** or the **[ENTER MSG]** key to enter new page ticket, it will increment by 1.
- d. Press **[ALT]+[SELECT]** to access the on call scheduler and choose the correct contact.
- e. Press select to or use mouse to select a contact method. The page ticket will pre-fill with the contacts information and programming requirements.
- f. Press **[FILE]**. (Notice "**Alpha Queued**", "**SMS Queued**" or "**Email Queued**" prompt.)

3. Re-paging and Generating a New Page Ticket

Press **[PAGE]** to access the Pending pages list, find and **[SELECT]** the desired page ticket. Press **[DIAL]** to dial-out a new Page Ticket will be generated and incremented.

REMOVE A PAGE TICKET FROM PENDING PAGES LIST (REMAINS ON UNDLVRD LIST)

From the "**Standby**" state:

Press the **[PAGE]** key.

Press the arrow keys (to move to highlighted Page ticket).

Press the **[SELECT]** key.

Press the **[FILE]** key and press "**Y**" to remove the pending page ticket. The Message ticket will be removed from the 'Pending Page' list, but **will remain on the Account's Undlvr'd List.**

Press "Y" to REMOVE PAGE

MESSAGE DISPATCHING

ALPHA NUMERIC PAGING & TEXTING

Accounts can be programmed to transmit automatically as soon as a message is **[FILE]'d**, or the agent can manually generate a Page ticket to transmit.

1. Auto Transmit (XMT) to an Alpha Pager or Auto Text

If an Auto Destination has been configured in the Account's Master Record, the message is auto transmitted upon an Agent entering a message and pressing the **[FILE]** key.

Upon filing, the **"Alpha Queued" or "SMS Queued"** prompt will appear.

2. Transmit to an Alpha Pager or Text using a Manual Page Ticket

At the conclusion of message entry and **before** pressing the **[FILE]** key:

Press the **[PAGE]** key to activate the **"PAGE"** prompt.

Press **[ALT] + [SELECT]** and use the arrow keys to highlight the desired contact from the on call scheduler.

Press the **[FILE]** key. Note **"Alpha Queued" or "SMS Queued"** prompt.

3. Retransmit to an Alpha Pager or Text

From the **"Tracing Page"** state:

Press the **[ENTER MSG]** key to generate another Page ticket.

Press **[ALT] + [SELECT]** and use the arrow keys to highlight the desired contact from the on call scheduler.

Press the **[FILE]** key. Note **"Alpha Queued" or "SMS Queued"** prompt.

MESSAGE DISPATCHING

DISPATCHING CALLS (DIALING OUT)

With an account on screen,

Press the **[DIAL]** key, press a **[TALK]** key to access the desired "OUT" Activity Window. If using the mouse, select the 'Dial' agent shortcut button.

Manually dial or speed-dial a phone number. **If manually dialing, you must press the [DIAL] again to complete the out dial.**

When "Dialing Out", press **[SELECT]** to step out of the "Dialing Out" state to perform any other function if needed. (returns to "Standby" state)

When the call is complete, press the **[CLEAR]** key to disconnect. A **Dispatch ticket** will be presented to document the 'out-dial'. Fill in the Dispatch ticket fields, and then press **[FILE]**.

Dispatch For			
From		Result	
PH #			

▶▶ **Dispatch tickets cannot be cancelled. The first 2 fields, the 'For' and 'From', are required and HAVE to be filled out. The Dispatch ticket cannot be [FILE]'d until these fields are populated.**

ON-SCREEN SPEED DIALING

Numbers that appear on-screen enclosed by the < > characters, have been designated as On-Screen Speed-Dial numbers, for example <426-7662>. This feature allows an agent to Speed-Dial predetermined numbers from Information Screens, the Special Locate area, the on call scheduler and from Message Tickets.

Whether Dispatching, Paging, or Patching for an account:

Display the Speed-Dial number (on Info Screen, Special Locate, or Message ticket).

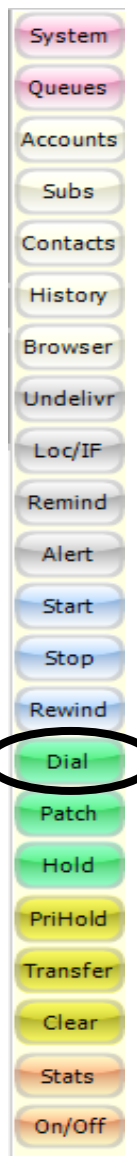
Press the **[DIAL]** key. Select a **[TALK]** key for an "OUT" Activity Window.

Press the **[SHIFT] + [SELECT]** keys, **or click screen** once with the mouse, press an arrow key to highlight the desired number.

Press the **[SELECT]** key and the number will be dialed, **or double-click** the number using the mouse. The phone number will appear in the dial window.

Press the **[DIAL]** key one final time, to send the number outbound.

Press the **[CLEAR]** key to disconnect the call, when desired. Complete the Page, Patch, or Dispatch ticket. Press the **[FILE]** key to complete the ticket.



MESSAGE DISPATCHING

USING DIAL-HOLD (SEE ALSO DUAL DIAL OUT PATCH)

Whenever an agent is out-dialing and finds it necessary to answer an incoming call, or put the dialed party on hold, a **Dial-Hold** can be used.

While in the “Dialing Out” state:

Press the [SHIFT] + [HOLD] keys. Note the ‘Dial Hold’ prompts. →



To access Caller on Dial-Hold:

Press the [DIAL] key (and the first Activity Window will display 'HOLD')

Press the corresponding [TALK] key of the holding call to pick-up the Caller and return to “Dialing Out” state

**Note - Only one Dial-Hold can be performed at a console at a time.

DIAL-HOLD PROCESSING

Spectrum Data Manager will redisplay the account associated with an out-dial when the call is taken off hold. If the desired account is already on display, no action will be taken. If a different account is being displayed when the call is taken off hold, the system will save any work-in-progress to the Agent's Incomplete stack and then display the desired account.

Note: If work is in-progress when the out-dial is place on hold, it will continue as before. This change has effect only when out-dials are taken off hold.

Notes

MESSAGE TRANSMISSION

TRANSMITTING MESSAGES VIA SMS, FAX, ALPHA OR EMAIL

1. Auto Transmit (XMT) **must be pre-programmed in the SDM's AMR.**

Answer a call.

Press the **[ENTER MSG]** key. Fill in fields on message ticket.

Press the **[FILE]** key. Note **"Alpha/Fax/Email Queued/SMS"** prompt.

Press the **[CLEAR]** key, if needed.

2. Transmit (XMT) with Page Ticket

Answer a call.

Press the **[ENTER MSG]** key and fill in fields on message ticket.

Press the **[PAGE]** key.

Press the **[FILE]** key.

Press the **[CLEAR]** key to disconnect with caller.

Choose contact method from on call scheduler.

Press the **[FILE]** key. Note the **"Alpha/Fax/Email Queued"** prompt.

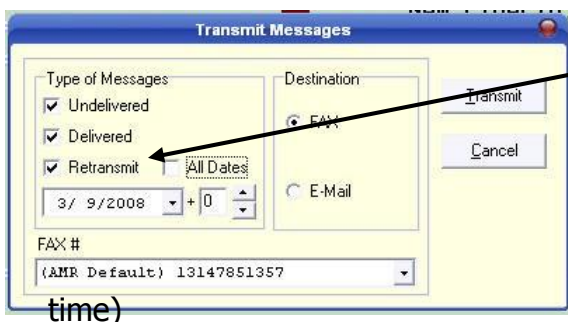
3. Transmit Undelivered or Delivered Messages on Demand (T&T)

With an account displayed on screen in the Standby state:

A. To transmit the entire message list:

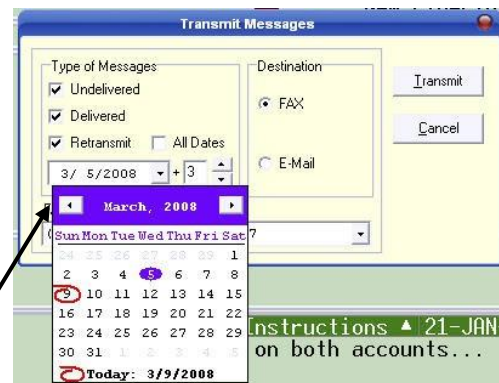
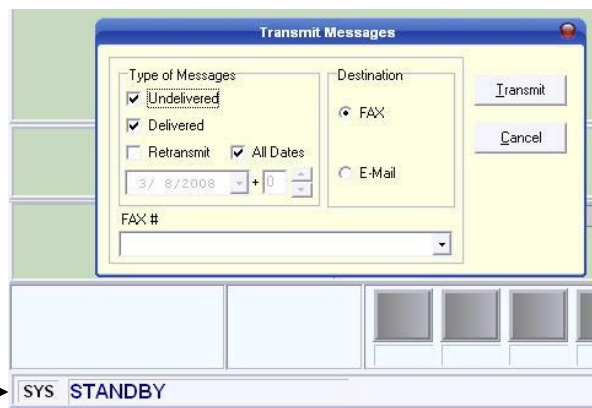
Press **'T'** to display the **Transmit Messages** list,

Select the message list desired, the default includes both the **Undelivered** and **Delivered** messages checked (enabled)



Check the **Retransmit** box if **Delivered Messages** are desired (if these messages have been faxed and/or emailed to the client during any other scheduled

time)
Then, if all dates are **not** needed, select a specific **start date** from the drop down arrow list and enter a number in the next box for up to 10 days total (the start date plus 9 additional days may be chosen)



Make the desired selections, and then choose **[Transmit]** or press **'T'**.

Note **"Alpha/Fax/Email Queued"** prompt highlighted in green at the bottom of the console.

MESSAGE TRANSMISSION

TRANSMITTING MESSAGES TO FAX, ALPHA OR EMAIL (CONTINUED)

B. To Transmit a Single Message

Press either the **[DELIVER MSG]** or **[REDELVR]** key for either the **Undelivered** or **Delivered Messages** list.

Use the arrow keys to locate desired date, then press **[SELECT]** to display the message.

Press **'T'** to **Transmit** or **'R'** to **Retransmit**, the Transmit Selected Message window will appear with more options to transmit the message list:



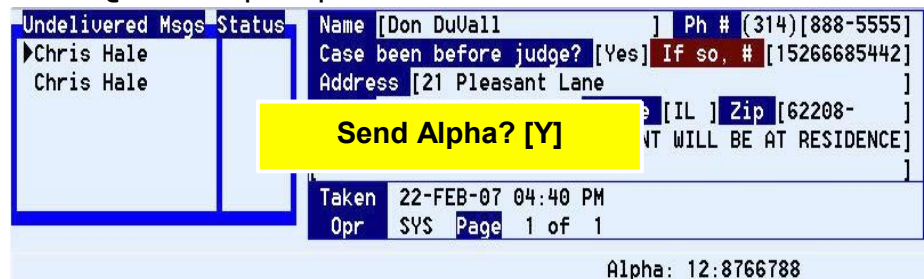
Make the desired selections, and then choose **[Transmit]** or press **'T'**.

Note **"Alpha/SMS/Fax/Email Queued"** prompt.

4. Transmit Undelivered Messages on Demand

With an account active on screen:

Press the **[DELVR MSG]** key.



Use the arrow keys to locate a specific message then press **[SELECT]** key.

Press **[ALT] + [SELECT]** keys to select a method from the on call scheduler.

Agent asks to confirm, press **"Y"** to send.

Note **"Alpha/SMS Queued"** prompt.

5. Transmit Retained Messages on Demand

With an account active on screen:

Press the **[ALT] + [REDLVR]** keys.

Use the arrow keys to locate desired date. If a specific message is not highlighted (selected), all messages for the date displayed will be transmitted.

Press **'T'** to **Transmit**, the appropriate Transmit window will appear.

Make the desired selections, and then choose **[Transmit]**.

Press **'Y'**. Note **"SMS/Alpha/Fax/Email Queued"** prompt.

Press the **[Esc]** key **twice** to return to the **"Standby"** state.



REMINDERS AND MEMOS

CREATING A REMINDER

Reminders can be entered at the Management Terminal or from Agent Consoles. **Reminders entered from Consoles must be acted upon within 24 hours, appear only once, and do not generate a ticket when [FILE]’d.**

To Enter a New Reminder:

Display an Account or Sub-Account

Press the **[SHIFT] + [REMIN]** keys or, if using the mouse, select the **‘Remind’ agent shortcut button.**



Fill in fields with **Reminder Information.** Enter time in **24-hour** military format.

Press the **[FILE]** key. Note the **“REMINDER”** prompt has been activated.



Acting on the Reminder Prompt

When the **“REMINDER”** prompt flashes, while in **“Standby”** state, Press the **[CTRL]+[REMIN]** keys, or, if using the mouse, select the **‘Remind’ agent shortcut button** or double-click on the flashing **green Reminder** prompt.

Use the arrow keys to move cursor through the Pending Reminder list until the desired **Reminder** is located.

Press the **[SELECT]** key to display the **Pending Reminder**, read and follow **Reminder** instructions.

Once the function and/or dial-out has been completed, press the **[FILE]** key.

***NOTE: It is recommended to complete the task noted in the Reminder before pressing the [FILE] key.**

Pending Reminders 1 of 1	
Meeting	Account 6064

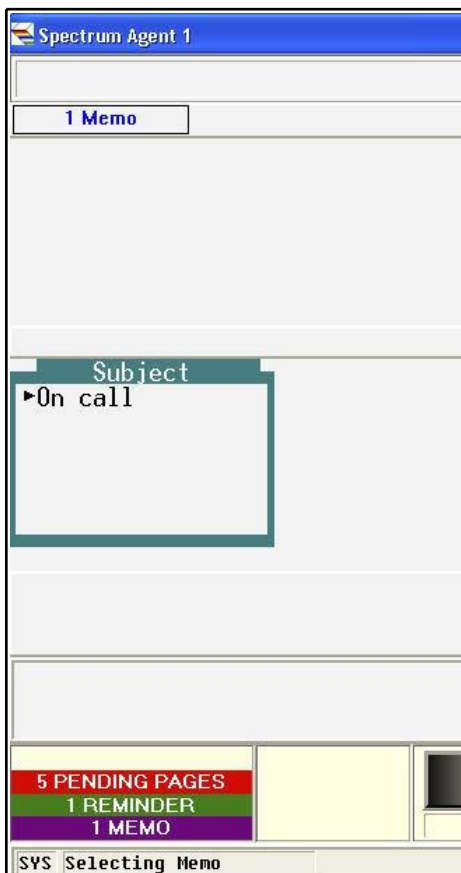
To Edit an existing Reminder

Follow the above instructions to display a pending Reminder then:

Press the **[ENTER MSG]** key to **edit** the Reminder.

Press the **[FILE]** key to save the changes, then press **[Esc]** **twice**, if needed.

ACTING ON THE MEMO PROMPT



When a purple **Memo** or purple **Transmit Error** prompt appears, from a blank screen "Standby" state:

Press the **[DELIVER MSG]** key.

Use arrow keys to move cursor to desired **Memo**.

Press **[SELECT]** to view **Memo**.

Press the **[FILE]** key to **remove** the memo, or the **[Esc]** key **twice** to return the **Memo** to the pending list.

Note: Make sure you write down the Transmit Error information to hand to your supervisor before [FILE]'ing.

OPTIONAL FEATURES

USING TOUCH-TONE OUTPUT ON DID LINE

This feature allows an agent to out-dial digits on an incoming DID line without performing a switch-hook flash first. This is useful when the agent needs to activate some automated response using touch-tone digits such as gates, alarms, or automated collect calls. This feature is also functional with any inbound trunk type.

Answer a call, when touch-tone digits are required, press **[DIAL]**, the Activity Window will change to violet **"DIAL"**. The agent can still speak with caller.

Enter touch-tone digits using the Numeric Keypad or speed dial from screen. Press **[DIAL]** again to return to green **"TALK"** window.

Press **[CLEAR]** disconnect from call.

Note: You cannot enter tones while in the 'Entering Scripted Msg' state.

PATCHING A CALL (MANUALLY, NOT USING THE ON CALL SCHEDULER)

Patching a call allows a client to be connected with a caller who is at a specified phone number found in a message.

- a. Answer a call
- b. Press the **[PATCH]** key, this 'parks' the caller and the console displays available Patch lines in the Activity window.
- c. Press the **[TALK]** key for an **"OUT 1-4"** in the Activity Window.
- d. Manually dial or speed-dial the desired number.
- e. Press **[DIAL]** key, digits sent, call rings, announce caller
- f. Press the **[PATCH]** key again drops you from line, keeps the two callers connected or "Patched".
- g. Complete the Patch ticket; press **[FILE]** to complete.

OPTIONAL FEATURES

USING THE INTEGRATED SEARCH FEATURES

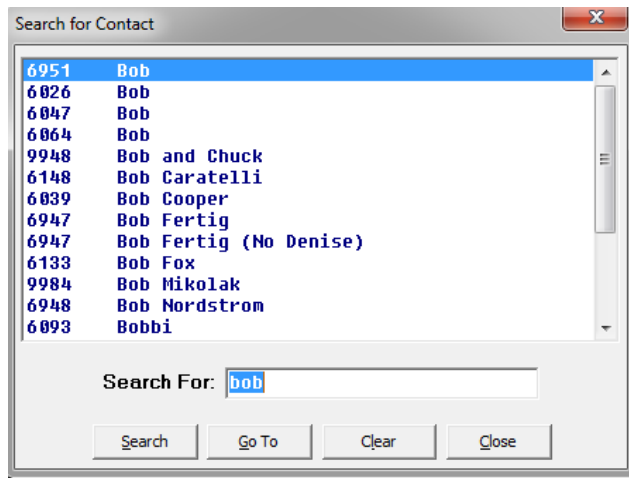
From any state,

Press the **[APPS] +S** keys.

If using the mouse, select the **'Accounts' or 'Contacts' shortcut button**.

Accounts: Choose to **Type of Search** desired; by **Account Number** or **Answer Phrase**.

Enter search criteria in the **Search For:** field then click the **Search** button.



***Hint:** Enter partial or whole words/names. The system detects consecutive characters and displays all matching entries.

Use the **Vertical Scroll** bar to scroll through the search results listing to locate the desired account.

Select the desired account then click the **Go To** button or **'double-click'** on desired account, account will appear, click **Close** at search completion.

NOTE: If a new account has been added to the Spectrum Data Manager and Spectrum Agent programs, a new backup has to run before the new accounts will show up in the Search Directory. Please see a supervisor if encountering this issue.

OPTIONAL FEATURES

USING SYSTEM STATUS WINDOW

The **System Status window** appears in a table format made up of columns and rows and is comprised of a collection of 4 tabs. These tabs allow agents to view the system's current activity. This window may be accessed both while an agent is **signed on** to the console and while the console is "Idle".

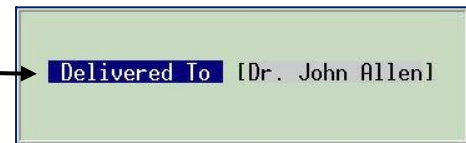
Press the **[SHIFT]+[STATUS/CLEAR]** keys or if using the mouse, select the **'System' agent shortcut button**. The **System Status** window will appear:

Pending Pages Tab

The **Pending Pages Tab** identifies each Page ticket currently active in the system in the first column. The second column identifies the Station where the page resides. The third column displays the current account being displayed on agent's station, then what text is entered in the "FOR" field, when the page was filed, and the last column shows when the page (if at all) is due to expire.

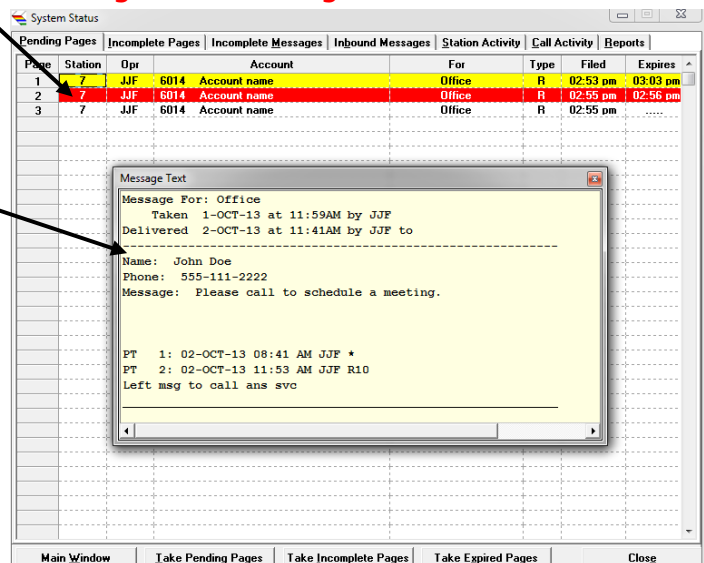
Pending pages highlighted in **white** indicate that there is no repeat timer entered on the page. Pending pages highlighted in **yellow** indicate that a repeat timer has been entered, however, is still current and has not expired yet. Finally, pending pages highlighted in **red** indicate that a repeat timer has been entered and has now expired and requires immediate attention.

Double-left clicking on a pending Page will display an account's Undelivered Messages list, allowing for the message and page ticket to be viewed.



Left-clicking on a desired column header (e.g. Station, Opr, Account, etc.) will sort pages according to the column header in either ascending or descending order.

Right-clicking on a desired pending page in the 'Pending Page' window will allow the message text for a pending page to be viewed. All associated page so as to allow an agent to quickly review the page history. The message text is displayed in a pop-up window that will stay on the screen until closed by the agent. The agent can click on any other window, if desired, while the pop-up is on display.



Pending Pages can also be **'taken'** from one console and added to another console. This can be especially helpful to facilitate distribution of pages when using **dispatch stations**.

Take Pending Pages - Selecting the **"Take Pending Pages" button** will present a drop-list of consoles with pending pages. Select a console from the list, then click 'Transfer' to take ALL pending pages from the source console and bring them to the destination console.

Take Incomplete Pages - Selecting this button will present a list of consoles with 'un-filed'

Page tickets. Incomplete Pages do not appear in the pending pages list as these page tickets have yet to be executed. When using Dispatch Stations, Incomplete Pages may accumulate at busier stations. The **"Take Incomplete Pages"** button will allow agents to 'jump in' to help dispatch page tickets not yet acted upon.

Station - The console number that currently has Pages pending (messages waiting for client response for delivery).

Opr - The Agent ID that initiated the Page.

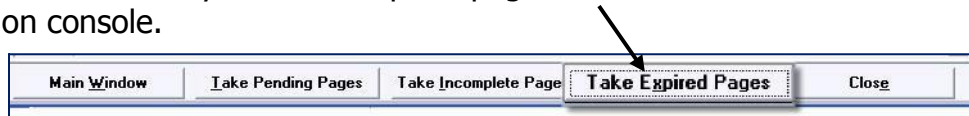
Account - The name of the Account for which Page(s) are pending.

For - The name entered in the 'For' field of the message ticket (name of the person for whom a response is pending).

Filed - Displays the time the Page ticket was initially 'Filed'.

Expires - If a timer (Repeat Interval) has been set for this Page, this column displays the time remaining before further action is needed.

Take Expired Pages - Selecting the **"Take Expired Pages"** button will present a drop-list of consoles with pending "expired" pages that are displayed in red. Select a console from the list, then click 'Transfer' to take only their red expired pages from the source console and bring them to the destination console.



Stations Tab

On the **Stations Tab** each record (row) displays the current status of each Station. The Station number is identified in the first column. The status of up to 64 consoles can be accessed from this window.

Station	State	Id	Telephony	Account	For	Pages	Incompl
1	Entering MSG	SYS	In(1)	0000 INTEGRITY LAW OFFICES		6	1
2	Standby	SYS	...	1111 Mike's Towing & Recovery		1	1
3	Dialing Out	SYS	Out(1)	0000 INTEGRITY LAW OFFICES		0	0
4						0	0
5						0	0
6						0	0
7						0	0
8						0	0
9						0	0
10						0	0
11						0	0
12						0	0
13						0	0
14						0	0
15						0	0
16						0	0
17						0	0
18						0	0
19						0	0
20						0	0
21						0	0
22						0	0
23						0	0
24						0	0
25						0	0
26						0	0

Operator Information	
Operator SYS Signed On 8-Mar-08 at 5:04 PM	
Level 9	
Time On: 23 min	Msgs Taken: 3
Answer Time: none	Msgs Delivered: 6
Calls Answered: 0	Page Tickets: 3
Placed On Hold: 0	Dispatch Tickets: 0
Taken Off Hold: 0	Patch Tickets: 0
Dial Outs: 0	Locates: 0
Recordings: 0	Reminders: 0

Right-clicking on a desired station will bring up an Operator Statistics pop up window for that particular station's signed on operator. Right-clicking on any chosen station will also bring about the same results. Supervisors can keep track of their operators' stats quickly and easily.

The following defines each column in the Stations Tab:

Station - The number configured in the console software that identifies the station.

State - The current 'State' of the console program, for example: Idle, Standby, Entering Msg, etc.

ID - The Agent ID of the agent currently signed onto the station.

Telephony - The inbound and outbound trunk number for active calls.

Account - The name of the Account currently displayed on the console screen.

For - The name entered in the 'For' field if a message entry is in progress.

Pages - The total number of Pending Pages residing at the console.

Incompletes - The total number of pending Incomplete Pages (if Dispatching by stations is enabled and "Givers and Takers" are set up) residing at the console.

REPORTS Tab

A Report tab on the System Status Screen provides the ability to generate important call management reports to the operator at the Agent console.

Find Accounts with Undelivered Messages

This report is similar to the one that can be produced from the main SDM interface which has always been reserved as a management task until now. This report lists only the accounts that have undelivered messages. There is a checkbox filtering field that when enabled will bypass any messages that have been marked with a highlighted "R" for "Reviewed".

Operator Activity

This report is a subset of the report that is available from the main SDM interface (See View: Call History: Analyze: Operators). The date range for the report is limited to one day, broken into either 15 minute, 30 minute, or hourly intervals. Call traffic can be filtered by Client Class in order to facilitate certain kinds of analysis, for instance, operator performance at a satellite office.

Find Accounts with IF Messages and Non-Blank Locates

This report allows for the creation of a list of accounts with either non-blank 'Locate

Instructions' or one or more defined 'IF Messages'. The format of the report matches the format of the same report generated from the main SDM interface.

The screenshot shows the 'System Status' window with the 'Reports' tab selected. It contains three main report sections:

- Find Accounts with Undelivered Messages:** Includes a 'Create Report' button, a checked 'Bypass Reviewed Messages' checkbox, and a 'Client Class' dropdown menu set to 'All'.
- Find Accounts with IF's or Locates:** Includes a 'Create Report' button.
- Active Messages:** Includes a 'Create Report' button, input fields for 'Account Number' and 'Sub-Account', a 'Text Filter Level' dropdown, a date range selector (3/8/2008 to 0), and checkboxes for 'All Dates', 'Undelivered', 'Delivered', 'Page Tickets', 'Patch Tickets', 'Dispatch Tickets', 'Locates', 'IFs', and 'Reminders'.
- Operator Activity:** Includes a 'Create Report' button, a 'Date' dropdown (3/8/2008), an 'Interval' dropdown (15 Minutes), and a 'Client Class' dropdown (All).

At the bottom of the window, there are buttons for 'Main Window', 'Take Pending Pages', 'Take Incomplete Pages', 'Take Expired Pages', and 'Close'.

OPTIONAL FEATURES

SHORTCUT POP-UP WINDOW

Located along the right side of the Agent console window are short-cut buttons to assist the agent with some console features.

System	System - Displays the System Status Window
Queues	Queue - Displays the Call Queue window
Accounts	Accounts - Displays the Directory Search window of all accounts in the SDM
Subs	Subs - Displays a list of Sub-Accounts (if present)
Contacts	Contacts - Displays the Directory Search window for all contacts in on call scheduler
History	History - Displays the list of Recent Calls handled
Browser	Browser - Opens the Spectrum Browser window
Undelivr	Undelivr - Performs a search for accounts with undelivered messages present
Loc/IF	Loc/IF - Performs a search for accounts with IF messages and/or non-blank Locates
Remind	Remind - Create a new reminder or display pending reminders
Alert	Alert - Create a new Account Alert or edit an existing Account Alert
Start	Start - Start Recording (must have VRS enabled)
Stop	Stop - Stop Recording (must have VRS enabled)
Rewind	Rewind - Allows operator to rewind previous recording (must have VRS enabled)
Dial	Dial - Initiates on Out-dial
Patch	Patch - Initiates a Patch
Hold	Hold - Places the active call on 'Hold'
PriHold	Pri-Hold - Places the active call on 'Priority Hold'; exclusive only to the acting console
Transfer	Transfer - Initiates a transfer of the active call to another console
Clear	Clear - Removes the active call from the console (hang-up)
Stats	Stats - Displays the Operator Information window
On/Off	On/Off - Initiates the Sign-On/Sign-Off sequence.

NOTES
