



*Happy Holidays from
Ohio Data Transfer*

**THINKING OUTSIDE THE BOX
IN CUSTOMER SERVICE**

Look for announcement of new generation 6.0 soon

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Planning for your new ODT VISION Voice Response Unit Leads to an Easy & Successful Implementation

The Merriam-Webster dictionary defines plan as “a method devised for making or doing something or obtaining an end...syn (blueprint, design, game plan, project, scheme, or strategy).

The **ODT VISION®** for the **iSERIES/AS400** allows the end-user to provide telephony for your users 24/7 to both host and micro applications. The beauty of this interface is that you can do your own customization to match your ever changing business needs. It is best to always formulate a “plan” which covers what your project will be. Our goal will be to have a game plan for the implementation including a flow chart of what the application will be.

The ODT VISION VRU Game Plan Will:

- Formulate what functions this unit is to provide a solution for
- Distinguish what systems provide the required information for those functions
- Identify features that are required in those applications
- Determine what requirements for logging and audit trails must be maintained
- Consider future applications and possible phases of development
- Establish a time line for the various goals and phase

- Appoint an IT staff member who is the Project Team Leader (Individual is our 1st contact with your firm on anything including [computer link, problems, software, development, etc...])

VRU Applications

First you must know what applications the ODT VISION VRU will be used for. This may be standard garden variety applications such as order entry, shipment status, accounts payable or customized applications which are unique to your business needs. Most of client’s applications are simply using the ODT VISION VRU as a terminal to their data. We need to distinguish what system(s) the data for this application is on. Our unit allows us to connect concurrently to multiple platforms. The game plan may be structured with multiple phases where one application will be accomplished by said date, and additional applications will be added later. It is always helpful to have a flow chart which shows:

- Logic of user's call within the different applications
- Future phases
- Elements of data or host applications
- Requirements of audit log tails

Built into the application may be on-demand report generation, email support to people in the field, the storing and forwarding of information (both text or recorded audio), foreign language support, and automatic call distribution.

Rule of thumb, if you have a live customer service personnel talking to someone on the phone and they are looking up or inserting data to a computer screen, they can be replaced with the ODT VISION unit where the caller doesn’t need that live representative. This allows you to take an application to 24/7, 365.

Where To Start

An old phrase, **Those who fail to plan, plan to fail.**

We always start with a “Plan of Action” for the ODT VISION Voice Response Unit Implementation. This game plan will contain what issues the client who is implementing

the ODT VISION VRU is responsible for and what issues the ODT VISION VRU vendor will be doing. Critical to the implementation is the appointment of a technical contact for the ODT VISION project at the client site. This "Project Leader" is the firstline of communication for any ODT VISION VRU problems, future or current development, system issues, unit system administration, and host/data security issues. The 'Project Leader' should be familiar with their own site, systems, phone connections, various departments and applications which will be using the VRU system administration, and the ODT VISION VRU unit itself. *(Generally this is an IT staff member.)*

This individual will also assist with the formation of the actual game plan. Contained within this plan will be a time line and flow chart of what the application(s) will look like.

Site Preparation

The ODT VISION VRU comes in as a rack-mounted process which is running Windows 2000 professional. Within this unit will be Rumba 2000 in the iSeries/AS400 environment or Microsoft Access 2000 if connection will be to ODBC compliant databases. Also loaded on the unit is Outlook 2002 for e-mail support and Creative Sound Studio for voice file recording through the Soundblaster card. A LAN card is also supplied to connect to the network.



The base unit contains a four-line Dialogic analog voice card. Additional cards can be added at the time of purchase or in the field in multiples of four lines per card up to a total of 24 lines per unit. If the function of call transfer out of the VRU application back to a live

person is required, the analog extension which each port of the dialogic card is connected to will have to be an analog extension off the PBX. In order to accomplish this transfer, the script will do a flash hook and then dial the extension which the caller will transfer to. The only other requirement of this extension is that the termination character, (drop current loop), is forwarded to that extension if the caller ever hangs up during the call. The unit will need to either back out of the host system application display screen program or close the database and recycles itself for the next call. Generally, you will have one phone number for your users to call which are a part of a hunt group which finds an open line on the VRU.

Installation

The unit is connected to the network and the LAN card is configured based on the Network Administrator's requirements. Next we need to configure Rumba for the host system or establish the ODBC link to the micro databases through Microsoft Access.

Testing

Even if your phone lines are not in yet, you can start testing as soon as the data link is established with the VRU with the "Test Phone" utility. You can record temporary voice files to use in the testing and build the script in micro parts which test the logic for different parts of your application. These micro-parts can then be combined into the master script. You can not test too much, there is no such thing as too much testing.

Now, you are almost finished. Test the script, record the final voice files and make sure all features are working. In conclusion, your preparation will be rewarded with an easy and successful implementation of your new unit. ■



Voice File Manager

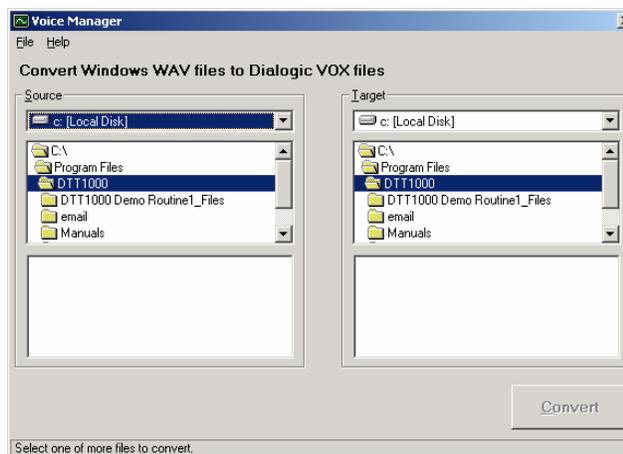
A great feature of the ODT VISION Voice Response Unit is the Voice File Manager Utility which enables you to use "wav" voice files which can be recorded on any PC and moved to the ODT VISION unit. This utility will convert these "wav" files to the "Vox" file format which is required by the dialogic card(s). There are two general classes of

voice files within the ODT VISION unit.

"Application Voice Files" are the outbound voice banners within a routine such as, "Enter your 9 digit Social Security Number."

"System Voice Files" are located in dialogic "system voice files" container. They are used when a variable is a date, currency, time, etc. to be spoken back to the caller.

An example would be the dollar amount "\$200.45" The VRU would speak (200, dollars, and, forty, five, cents.) To match the system voice files with the application, you must export and re-record the system voice files individually and then import them back into the system container. The Voice Mgr. provides this function. ■



7 Things That All Voice Application Should Have

We have all done it before; dialed in to a voice response unit, which is more of an aggravation than a help. It is important in your designs of your applications to take a few steps to improve the ease of use for your caller.

Can not transfer out of VRU to live representative

The number one complaint against most VRU routines is the lack of ability to transfer out of the exiting path to a customer service representative. Always build an exit strategy within your program that allows the caller to transfer to a live customer service representative during office hours, leave voice mail, or play a voice banner which gives the caller another phone number to call for additional assistance.



Help, I'm in a continuous loop

Almost as aggravating as not being able to transfer to a live person is to be caught into a loop you can only resolve by hanging up. Always build a backup step in the menu to go to the previous menu or the general main menu. A caller may find out that the retrieved information may cause them to need to do something else.

This Menu is too complex

Never make a menu beyond 5 items. It is better if you create sub-menus with branches of previous menu. If there are too many items to a menu, the caller will forget what is available by the time they get to the last item. You may also consider replaying the menu upon prompted, or if no data is entered after a certain amount of time.

Voice prompt keeps playing

If the caller hears what they are looking for or use the system a lot, they will key the menu option once it is heard. Place in your script the option to discontinue the voice file once any key is pressed. This will allow the user to use the system faster without having to hear every voice file prompt in its entirety.

Golden rule, "Don't ask caller for something they don't know"

This is one of the most important rules of all. If the housewife calling in to check the status of her shipment and doesn't know her tracking number, ask her for the phone number she used when the order was placed. Read back the most recent order which used this phone number. That is probably the one she is looking for.

I don't know the logic of the routine or what data is allowed

Ease of use in some routines which are complex or where a lot of data is going to be entered can be made easier if the user knows what information is expected. An example of this might be an

"Open Enrollment" in insurance. In this example, the user just wants to go into one item in the "Open Enrollment" application and change that item instead of answering questions for each item. (Item 23, change family dental deductible...values allowed \$200, \$500, \$1000) Additional assistance could come from an instruction form which contains a number for each question and the values allowed for that question which could be selected on the form before the user calls in. Also you might want to make instructions available to potential users.

Build a log of usage

A chain of convenient stores has a form for its employees to fill out which contains tank levels, cigarets cartons counts, & sales receipts totals before they place the call. Once they identify their store, the questions are asked in the same order as listed on the form. On an interesting side note, there are different number of gas tanks at different stores but once the caller has entered their store number, the VRU will know which list of questions to use.

Your telephony system may be dynamic where it is always changing to improve the customer service function. It seems to always be a second thought in the design and planning of a new application to build a log which will show the audit trail of how your users are using the system.

Things that the log should contain:

- User who used system
- Date/Time stamp of activity
- What application did the use
- Length of call
- Did they request a transfer out of the system
- (Optional) Survey of satisfaction of session
- Security issues and changes in profile or passwords
- Hang-ups with no response

By adding any or all of these points, your system will be more informative and easier for the user to use.

Also review the "line usage utility" to monitor capacity issues for a comprehensive understanding of how the unit is being used..■

The user was just in a shipment status application and found that the order is on "credit hold." He may want to make a payment with credit or debit card to release the order or talk with a customer service representative to handle the situation.

Get Your Own Demo Today

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Go to www.ODTVISION.com to get your own demonstration of the ODT VISION Voice Response Unit which will run on any Windows based PC of Windows 98 or later with sound card and speakers. This is a simplistic order entry and shipment status system which is running off a Microsoft Access database. The demo is in the test mode and you will be using the "Test Phone" feature of the ODT VISION VRU to simulate a phone call to the data.

Improving Customer Service Affordability

Submit your technical questions or get free project analysis regarding your telephony application to:
TechSupport@ODTVISION.com
Or Call: 614-985-3814

HOW DO THEY DO THAT? "Report Generation on Demand (cont. from last month)"

One of the more interesting applications for which many of our clients use the ODT VISION VRU is an I/O which creates a query report which can be sent out via fax interface. In this application, the VRU obtain variable values from the screen (although the caller may supply values) which is inserted into an existing query report. This recalled query is then edited with the new values and fax number which is dumped to the fax outq. You may also have a report menu where the caller selects which query report they need.

This example code is for an insurance company which is sending out a "schedule benefits report" via fax based on caller's group and EDSCode number using a DocGate fax interface.

```

;Get Value for Group Number
;-----
GroupNumber = SessionGetScreen 5,65,5
GroupNumber = lefttrim Groupnumber
EDSCode = SessionGetScreen 6,65,3 ; "vVALUE WE WANT TO USE FOR EDS Code"
sessionwait
;SessionSendKeys "@3" ;Back out of record screen to get to command line
;sessionwait
SessionSendKeys "wrkqry" ; Start wait 2
Query SessionSendKeys "@E" ; Press
ENTER sessionwait
sessionSendKeys "2"
SessionSetCursor 9,28
    
```

```

SessionSendKeys "VRU"
SessionSendKeys "@A@E"
;-----
;***** here is where sub menu for type of report goes
;-----
SessionSetCursor 8,26
SessionSendKeys "@4"
sessionwait
SessionSetCursor 12,23
SessionSendKeys "2"
SessionSendKeys "@A@E"
SessionSetCursor 13,23
SessionSendKeys "2" ;FIELD VALUE TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSendKeys "@E" ; ENTER KEY
sessionwait
SessionSetCursor 13,03
SessionSendKeys "1" ;FIELD VALUE TO SELECT
SessionSendKeys "@E" ; ENTER KEY
Sessionwait
SessionSetCursor 11,35
SessionSendKeys GROUPNO ;FIELD VALUE
TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSetCursor 12,35
SessionSendKeys Subkey ;FIELD
VALUE TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSendKeys "@v" ;pagedown
sessionwait
SessionSetCursor 7,35
;msgbox "Value of EDS Code"
;msgbox EDSCode
SessionSendKeys EDSCode ;FIELD
VALUE TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
testname = INPUTBOX 900, "vVALUE WE WANT TO USE FOR testname"
SessionSetCursor 8,35
SessionSendKeys testname ;FIELD VALUE TO
SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSendKeys "@v" ;pagedown
sessionwait
SessionSetCursor 7,35
SessionSendKeys GROUPNO ;FIELD VALUE
TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSetCursor 8,35
SessionSendKeys Subkey ;FIELD
VALUE TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSetCursor 9,35
SessionSendKeys EDSCode ;FIELD
VALUE TO SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSetCursor 10,35
SessionSendKeys testname ;FIELD VALUE TO
SELECT
SessionSendKeys "@A@E" ;FIELD EXIT
SessionSendKeys "@E" ;Screen enter
sessionwait
SessionSendKeys "@3" ;cmd 3
sessionwait
SessionSetCursor 5,29
SessionSendKeys "Y" ;enter Y
SessionSetCursor 7,29
SessionSendKeys "2"
SessionSendKeys "@E" ;Screen enter
sessionwait
SessionSetCursor 20,03
SessionSendKeys "2"
SessionSendKeys "@E" ;Screen enter
sessionwait
SessionSetCursor 19,03
SessionSendKeys "1"
SessionSendKeys "@E" ;Screen enter
sessionwait
SessionSendKeys "@E" ;Screen enter
sessionwait
SessionSendKeys "@E" ;Screen enter
sessionwait
Sessionsendkeys "Y"
SessionSendKeys "@A@E"
SessionSendKeys "@E"
SessionSendKeys "@E"
SessionSetCursor 7,29
SessionSendKeys "2"
;enter Y
SessionSetCursor 7,29
SessionSendKeys "Y"
sessionwait
SessionSetCursor 13,03
SessionSendKeys "1" ;enter 1
SessionSendKeys "@E" ;Screen enter
sessionwait
    
```

GetFax: (covered in last month's newsletter)

FaxNo = "##TO:" & FaxNo
FaxNo = Faxno & "!" ;docgate fax command
SessionSendKeys faxno ; adds fax number and cmd. To query rport screen

```

SessionSendKeys "@E"
sessionwait
SessionSendKeys "@E"
sessionwait
SessionSendKeys "@3"
sessionwait
SessionSetCursor 5,29
SessionSendKeys "Y"
;enter Y
SessionSetCursor 7,29
SessionSendKeys "2"
SessionSendKeys "@E" ;Screen enter
sessionwait
    
```

Special Note

Create clone query reports for recall to edit for each separate line so the VRU will not get a query lock if more than one user is accessing the same type of report at a time.