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Revision Date: February 25, 2013
## Contents

- Actions Plug-in .............................................................................................................. 5
- Introduction to Actions ............................................................................................... 6
  - A Note on Different Types of Actions ................................................................. 6
  - Launching the Actions Plug-in ............................................................................. 7
- Adding an Action to a Client Account ....................................................................... 8
  - Actions Fields and Settings .................................................................................. 10
  - Defining Actions That Dispatch Messages or IntelliForms .................................. 13
  - Defining Actions That Dispatch Reports ............................................................. 16
- Editing an Action ........................................................................................................ 17
- Deleting an Action ..................................................................................................... 18
- Copying an Action ..................................................................................................... 19
- Index .......................................................................................................................... 20
This document describes how to use the Actions Plug-in within Startel CMC Administrative Controls.

Sections include:

- **Introduction to Actions** (page 6)
  This section introduces concepts and features that are fundamental to the Actions Plug-in.

- **Adding an Action to a Client Account** (page 8)
  This section teaches you how to add an Action to a client account, and describes each of the settings that you use to define different types of Actions.

- **Editing an Action** (page 17)
  This section teaches you how to edit an Action.

- **Deleting an Action** (page 18)
  This section teaches you how to delete an Action.

- **Copying an Action** (page 19)
  This section teaches you how to create an Action by copying and then editing an existing Action.
INTRODUCTION TO ACTIONS

In Startel CMC Administrative Controls, you can use the Actions plug-in to define Message Actions, Check Actions, and Dispatch Actions for your call center. These Actions are client-specific events that you can program to occur at specific times. For example, you could set up a Dispatch Action to fax client Messages each day at 4:00 PM. You could define a Message Action to pop up weekly reminders to update OnCall Schedules. You can define Check Actions that would notify agents when clients have unfiled Messages—and so on.

How do Actions Work?

Some Actions occur behind the scenes with no agent intervention. For example, a Dispatch Action dispatches Messages, IntelliForms, or Custom Reports automatically at a specific time on the day or days of your choosing.

Some Actions must be “retrieved” and attended to by an agent. When one or more Actions require attention, the Agent Interface command line displays the letters Ac followed by a number to indicate the number of waiting Actions, as shown below:

<table>
<thead>
<tr>
<th>message</th>
<th>Ac2</th>
</tr>
</thead>
</table>

To retrieve Actions, agents press the ACTN key and then select from a list of different Action types. (Options configured in the Site Settings and Agent Maintenance plug-ins affect how Actions are presented.)

When an agent retrieves a client-specific Action, Agent Interface automatically displays the screen for the appropriate client.

A Note on Different Types of Actions

There are actually eight Action types that require attention from Startel agents, and some are NOT defined in the Actions plug-in. These are:

- **Phone Dispatch Actions** (generated by Dispatch Scripts).
- **Email Response Actions** (generated by Email Response or Client Initiated e-mails).
- **Time Delay Actions** (created by agents in Agent Interface).
- **SM Response Actions** (generated by SMS message responses from clients).
- **System Notify** and **Dispatch Error Actions** (generated automatically by the Startel system when errors occur*).

* Some agents may be unable to see System Notify and Dispatch Error Actions. Access to these Actions is controlled by agents’ Access group assignments.
Launching the Actions Plug-in

Follow these steps to launch the Actions plug-in:

1. In the Startel AC Home page, double-click on the shortcut.

   The Actions opening window is displayed:

   ![Actions opening window]

   When you first open the Actions plug-in, **System** is the selected Client. If any
   Actions have been defined for the System client, they are listed in the window.

   To display or add Actions for another client, you need to click on the Client ID
down-arrow (), then select from a pop-up list of clients.

When you first open this screen, any Actions that have been defined for the **System client** are displayed. (Notice that **System** is selected to the right of the Client ID label at the top of the screen.)

The **System client** is a default client that is “hard wired” in the client database. This client allows you to create general purpose Actions that are not associated with a particular client. For example, you might want to create a System client Action that reminds agents to run reports, or perform other general maintenance tasks.

To list any Actions that have been created for another client, you need to click on the **Client ID** down-arrow (), then select from a pop-up list of clients (see page 9).

See the pages that follow for more information on how to add and manage Actions from this screen.


**ADDITION AN ACTION TO A CLIENT ACCOUNT**

Follow these steps to add a new Action to a client account:

- **NOTE:** Since Dispatch Actions are more complicated than Message or Check Actions, additional instructions for defining Dispatch Actions are provided on page 13.

1. Double-click on the shortcut in the Administrative Controls Home page. The Actions opening window is displayed:

2. If you want to add an Action for a client that is NOT the System client, click on the down-arrow (▼) to the right of the **Client ID** label.
A Client Selection dialog box opens:

If your call center has several pages of clients, you can move from page to page using the arrow buttons at the top of this dialog box. To go directly to the page containing a specific client, enter the Client ID into the Find Client field, then press Enter.

3 Select the client for which you want to create the Action. Then click OK.

Now the Actions page displays any Actions that have been created for the client you selected:

4 Click (Add) on the AC toolbar.
Now the screen looks like this:

The Action Types you can create are described on page 12.

5 Fill in this screen as appropriate for the Action you want to create. For information on how to do this, see the table that follows.

6 When you’ve finished, click (Save) on the AC toolbar. Then click (Back) return to the Actions opening screen, where the Action you created will now be listed.

### Actions Fields and Settings

<table>
<thead>
<tr>
<th>Field or Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
<td>Enter a name of up to 50 characters to identify the Action. It’s advisable to give Actions good, descriptive names.</td>
</tr>
<tr>
<td>Client Execute Time</td>
<td>Specify the time the Action should be executed in the client’s time zone.</td>
</tr>
<tr>
<td></td>
<td>➢ Note: This setting requires that the Time Zone feature be enabled for the client in the Client Maintenance General Settings element.</td>
</tr>
<tr>
<td>Field or Setting</td>
<td>Instruction</td>
</tr>
<tr>
<td>-----------------------</td>
<td>-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Priority</strong></td>
<td>Assign a priority level to the Action. Available priority values are 0 -10, with 10 representing the highest priority.</td>
</tr>
<tr>
<td></td>
<td>➢ Note: When an agent presses the ACTN key to retrieve Actions, and multiple Actions are active, priority values determine which Actions are handled first. When Actions are executed automatically by the system, the system uses priority values to determine execution order when Actions have overlapping Execute times.</td>
</tr>
<tr>
<td><strong>Local Execute Time</strong></td>
<td>This <em>read-only</em> value indicates the time that the Action will execute in the local time zone. This value is automatically calculated based on the entry in the <strong>Client Execute Time</strong> field.</td>
</tr>
<tr>
<td><strong>Action Owner</strong></td>
<td>The <strong>Action Owner</strong> section of the screen identifies the “owner” of the Action.</td>
</tr>
<tr>
<td></td>
<td>➢ Select <strong>Client</strong> if the Action applies to the general client account, and not to a specific client <strong>member</strong>.</td>
</tr>
<tr>
<td></td>
<td>➢ Select <strong>Member</strong> if the Action applies to a client <strong>member</strong>. Then open the <strong>Member</strong> drop-down menu and select from the displayed list of members.</td>
</tr>
<tr>
<td><strong>Frequency Type</strong></td>
<td>The <strong>Frequency</strong> section of the screen contains a <strong>Type</strong> setting that you use to indicate how often the Action should execute: <strong>Once</strong>, <strong>Weekly</strong>, <strong>Monthly</strong>, or <strong>Daily</strong>.</td>
</tr>
<tr>
<td></td>
<td>➢ If you select <strong>Once</strong>, a <strong>Date</strong> field appears to the right, with the current date entered by default. To change the date, click inside the Date field and then select a new date from a pop-up calendar. <strong>Note:</strong> Approximately fifteen minutes after execution, Actions with a <strong>Once</strong> setting are automatically removed from the client’s Actions list.</td>
</tr>
<tr>
<td></td>
<td>➢ If you select <strong>Weekly</strong>, the days of the week appear to the right (each with a checkbox). Select the checkbox for each day of the week that you want the Action to execute.</td>
</tr>
<tr>
<td></td>
<td>➢ If you select <strong>Monthly</strong>, the days of the month appear to the right (each with a checkbox). Select the checkbox for each day of the month that you want the Action to execute.</td>
</tr>
<tr>
<td></td>
<td>➢ If you select <strong>Daily</strong>, no other setting is displayed. The Action is activated every day at the selected execute time.</td>
</tr>
</tbody>
</table>
### Field or Setting

<table>
<thead>
<tr>
<th>Field or Setting</th>
<th>Instruction</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Action Type</strong></td>
<td>The <strong>Action</strong> section of the screen contains a <strong>Type</strong> setting that you use to select the Action type. Multiple options are offered in a drop-down menu:</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Message</strong> <em>&lt;Displays Text&gt;</em> if you want the Action to display a text message to the agent when the Action is pulled. To specify the message, type text in the displayed <strong>Message</strong> field.</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Check Messages</strong> <em>&lt;Show All Unfiled Messages&gt;</em> if you want the Action to display all unfiled Messages for the client. Type into the associated <strong>Message</strong> field to indicate the text message that should be displayed by the Action. (For example, <em>Relay all messages to current OnCall.</em>)</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Check IntelliForms</strong> <em>&lt;Show All Unfiled IntelliForms&gt;</em> if you want the Action to display all unfiled IntelliForms for the client. Type into the associated <strong>Message</strong> field to indicate the text message that should be displayed by the Action. (For example, <em>Relay all messages to front office.</em>)</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Dispatch Message</strong> <em>&lt;To Send Fax or E-Mail&gt;</em> if you want the Action to dispatch Messages to the client by fax or e-mail. For more information on this option, see page 13.</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Dispatch IntelliForm</strong> <em>&lt;To Send Fax or E-Mail&gt;</em> if you want the Action to dispatch IntelliForms to the client by fax or e-mail. For more information on this option, see page 13.</td>
</tr>
<tr>
<td></td>
<td>• Select <strong>Dispatch Report</strong> if you want the Action to dispatch a Report to the client by e-mail. For more information on this option, see page 16.</td>
</tr>
<tr>
<td><strong>Local Delivered Time</strong></td>
<td>This field is blank when you are adding an Action.</td>
</tr>
<tr>
<td></td>
<td>When you open the screen to edit or copy an Action, it will display the local time the Action was last executed or retrieved by an agent (if applicable).</td>
</tr>
<tr>
<td><strong>Last Action delivered by:</strong></td>
<td>This field will be blank when you are adding an Action.</td>
</tr>
<tr>
<td></td>
<td>When you open the screen to edit or copy an Action, it will display the initials of the agent who last retrieved the Action (if applicable). If the Action is the type requiring no agent intervention, STLTP is displayed. (This stands for STarteL Transaction Processor.)</td>
</tr>
</tbody>
</table>
Defining Actions That Dispatch Messages or IntelliForms

Using the Actions plug-in, you can define Actions that automatically dispatch Messages or IntelliForms at a scheduled time—with no agent intervention.

On the Actions menu, these Actions are listed as: Dispatch Message <To Send Fax or E-Mail> and Dispatch IntelliForm <To Send Fax or E-Mail>.

NOTES:

- The format of a dispatched Message Form or IntelliForm is dependent upon settings in the Client Maintenance plug-in’s Client Info or Members element (Faxes or E-Mails screens). IntelliForm formats may also be influenced by the Client Maintenance IntelliForm Report Format element.

- Whether or not Activity Trace or System Activity Trace information is included in a dispatched Message Form or IntelliForm is controlled by a client’s Priority settings.

Follow these steps to create one of these Actions:

1. Open the Actions plug-in and select the client for whom you want to create the Action. (See pages 8 - 9, if necessary, for client selection instructions.)

2. Fill in the top part of the Actions screen (as described on pages 10 - 11).

3. Open the Action Type drop-down menu and select Dispatch Message <To Send Fax or E-Mail> or Dispatch IntelliForm <To Send Fax or E-Mail>.

   Additional settings are now added to the screen. The first two are Unfiled and Filed checkboxes. You use these to indicate whether you want to dispatch Unfiled items, Filed items, or both.

   ![Action Type Menu](image)

4. Select the Unfiled or Filed checkbox—or select both, if you want the Action to dispatch both unfiled and filed items.

   ![Action Type Selection](image)

Unfiled items are waiting items that have not been “delivered” to the client.

Filed items are items that have been delivered to the client and now reside in the “Filed” area of the database.
If you selected the **Filed** checkbox, adjust the settings under the **Filed** heading to specify a time frame for the filed items. (See instructions below.)

If you want the Action to dispatch Message Forms or IntelliForms to all clients that have the same account number as the selected client, select the checkbox labeled **Include Clients with Same Account Number**.

### Defining a Time Frame

To specify a **Filed** time frame, you do not directly enter dates and times. Instead, you fill in **Start Period** and **End Period** values to define a time period **before** the Local Execute Time (and date).

Dates corresponding to the time period you define are automatically shown in **Local Start Time** and **Local End Time** fields. These fields allow you to confirm that you’ve entered the right values.

#### An Example Time Frame

Suppose that the Local Execute Time and Date are **4:00 PM, January 20**.

Now suppose that you want to dispatch Messages that were filed between **8:00 AM, January 11** and **8:00 AM, January 14**.

The beginning of the time frame, January 11, is **9 days** before January 20, so you need to set the **Start Period** setting to **9 days**.

The end of the time frame, **January 14**, is **6 days** before January 20, so the **End Period** setting should be **6 days**.

Now, the **time of day** for the desired time frame is **8:00 AM** for both the Start and End days. However, the Local Execute time is **4:00 PM**, which is **8 hours** later in the day. To account for the difference in hours, we need to add **8 hours** to both the Start Period and End Period—like this:

The Filed settings in this example translate as follows:

- The Start Period for the time frame is 9 days plus 8 hours before the Local Execute date and time (January 20, 4:00 PM).

- The End Period for the time frame is 6 days plus 8 hours before the Local Execute date and time.

The **Local Start Time** and **Local End Time** shown to the right of the entered values match the desired time frame, confirming that the entered values are correct.
7 Open the **Dispatch Type** drop-down menu and select **Fax** or **E-Mail** to specify which dispatch method should be used.

8 Open the **Description** drop-down menu (below Dispatch Type) and select the Fax number or E-mail address you want used.

- **NOTE:** If the Action Owner **Client** option is selected, all fax numbers or e-mail addresses associated with the client are included in the drop-down menu—including those entered for client members. If the Action Owner **Member** option is selected, the drop-down menu includes only member-specific items.

When you select from the Description menu, the **Value** field immediately below is filled in automatically with the fax number or e-mail address corresponding to the Description value you selected.

9 Click **(Save)** on the AC toolbar to save.

You have now created a Dispatch Action that will dispatch Messages or IntelliForms **automatically**, with no agent intervention.
Defining Actions That Dispatch Reports

Using the Actions plug-in, you can define **Dispatch Report** Actions that automatically run and dispatch Custom Reports at a scheduled time—with no agent intervention.

**Follow these steps to define a Dispatch Report Action:**

1. Open the Actions plug-in and select the client for whom you want to create the Action. (See pages 8 - 9, if necessary, for client selection instructions.)

2. Fill in the top part of the Actions screen (as described on pages 10 - 11). Then open the **Action Type** drop-down menu and select **Dispatch Report**. Additional settings are now added to the screen.

3. Open the **Report** drop-down list and select the desired report from the list of Custom Reports available for the client. (The list of available reports is controlled by the Custom Reports plug-in.)

4. Indicate the range of time you want represented in the report by filling in the **Start Period** and **End Period** settings. (See page 14 for detail on how these settings work.)

5. In the Email section, select the email address(es) to which you want reports dispatched. (The email addresses that are listed are those entered for the client or member in Client Maintenance.)

6. If you want the report sent as a CSV (Comma Separated Values) file, select the checkbox labeled **Send as CSV file**.

7. When you're finished, click ![Save](Save) on the AC toolbar to save.

You have now created a Dispatch Action that will dispatch Custom Reports to the selected client **automatically**, with no agent intervention.
EDITING AN ACTION

Follow these steps to edit an Action:

1  From the Administrative Controls Home page, double-click on the shortcut to display the Actions opening window.

   In the Actions opening window, the System client is selected by default.

2  Do ONE of the following:

   •  To edit a System client Action, skip to Step 3.

   •  To edit an Action for a different client, select the desired client using the selection tool at the top of the window (see pages 8 - 9 for instructions).

3  In the displayed Actions list, double-click on the Action you want to edit. (Or select the Action and click (Edit) on the AC toolbar.)

   The screen in which the Action is defined is displayed.

4  Edit settings, as necessary, to make desired changes to the Action (see note).

   If you need information on any of the settings, refer to pages 10 - 12.

5  When you’re finished, click (Save) on the AC toolbar.

   ➢ NOTE: The **Frequency Type** setting **CANNOT** be edited. The only way to change the Frequency Type setting for an existing Action is to delete the Action and create a new Action from scratch.
DELETING AN ACTION

Follow these steps to delete an Action.

1. From the Administrative Controls Home page, double-click on the shortcut to display the Actions opening window.

   In the Actions opening window, the System client is selected by default.

2. Do ONE of the following:
   - To delete a System client Action, skip to Step 3.
   - To delete an Action for a different client, select the desired client using the selection tool at the top of the window (see pages 8 - 9 for instructions).

3. In the displayed Actions list, select the Action to delete. Then click (Remove) on the AC toolbar.

4. When prompted to confirm the deletion, select Yes.

   ➢ NOTE: Actions that are currently queued for retrieval cannot be deleted. If you attempt to delete an Action that is already in the queue, selecting Yes in Step 4 displays a message informing you that the deletion is not possible.
COPYING AN ACTION

Copying and then editing an Action is an easy way to create a new Action—especially if the Action you want to create is similar to an existing Action.

NOTES:

➢ In the Actions plug-in, Actions can only be copied to the same client account. If you want to copy Actions between clients, you can do so using the Client Maintenance “Copy Client” function. See Chapter 4 in the Client Maintenance User’s Guide for instructions.

➢ When copying an Action you cannot edit the Frequency Type setting that was assigned to the original Action. If you want to create an Action with a particular Frequency Type setting, you’ll need to copy an Action with that Frequency Type already selected, or define the Action from scratch.

Follow these steps to create a new Action by copying an existing Action:

1. From the Administrative Controls Home page, double-click on the shortcut to display the Actions opening window.

   In the Actions opening window, the System client is selected by default.

2. Do ONE of the following:

   • To copy a System client Action, skip to Step 3.

   • To copy an Action associated with a different client, select the desired client using the selection tool at the top of the window (see pages 8 - 9 for instructions).

3. In the displayed Actions list, select the Action to copy. Then click (Copy) on the AC toolbar.

   The screen in which the Action is defined is displayed.

4. In the Description field, type a new name (up to 50 characters) over the name that is selected in the field.

5. Edit other settings, as necessary, to make changes to the existing Action.

   If you need information on any of the settings in this screen, refer to pages 10 - 12.

6. When you’re finished, click (Save) on the AC toolbar.

You can also copy a selected Action by selecting Edit > Copy Entry from the Menu bar.
Index

A
Action Description setting 10
Actions
  adding 8
  and Access groups 6
  copying 19
  creating 8
  deleting 18
  editing 17
  how they work 6
  retrieving 6
Actions "Add" screen 10
Actions fields and settings 10
Actions opening window 7
Actions plug-in
  introduction to 6
  launching 7
Actions shortcut 7
Actions that dispatch Custom Reports
  creating 16
Actions that dispatch Messages or IntelliForms
  creating 13, 16
Action Type setting 12
ACTN key 6
Agent Interface command line 6

C
Check IntelliForms Type setting 12
Check Messages Type setting 12
Client Execute Time setting 10
Client Selection dialog box 9
  arrow controls in 9
  copying Actions 19
  creating Actions 8
  Custom Reports 16

D
defining Actions that dispatch Custom Reports 16
defining Actions that dispatch Messages or IntelliForms 13, 16
deleting Actions 18
Dispatch Error Actions 6
Dispatch IntelliForm Type setting 12
Dispatch Message Type setting 12
Dispatch Report Type setting 12
editing Actions 17
Email Response Actions 6
End Period 14

E
ing File > Save command 10
Filed check box 13
Filed time frame 14
Frequency setting 11
  changing 17, 19

H
how Actions work 6

I
Include Clients with Same Account Number checkbox 14

L
Last Action Delivered By setting 12
launching Actions plug-in 7
Local Delivered Time setting 12
Local Execute Time setting 11

M
Message Type setting 12

P
Priority setting 11

S
setting Filed time frame 14
Start Period 14
System client 7
System Notify Actions 6

T
Type setting 12

U
Unfiled check box 13