MITEL

3300 | Integrated Communications Platform

ACD 2000 AGENT GUIDE
FOR THE MITEL 5212/5224 IP PHONE

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General Information About this Guide

This guide describes operation of the Automatic Call Distribution (ACD) 2000 Feature Package on Mitel Networks IP Phones.

For operation of other features associated with a Mitel Networks IP Phone (some of which will work in conjunction with ACD), refer to the set guide.

What is Automatic Call Distribution (ACD)?

The Automatic Call Distribution Feature Package is offered by the Mitel Networks 3300 Integrated Communications Platform (ICP). ACD is a method of switching large volumes of similar calls directly to a selected group of extensions (Agents). Up to 350 such Agents can be supported. All calls are distributed equally among the Agents. The calls are all of a similar nature, and the Agents are trained/equipped to provide the particular information or service the caller is requesting.

Typical examples of ACD applications include:

- airline reservation offices
- telephone order desks for department stores
- customer service departments of telephone or cable T.V. companies.

When there are more incoming calls than available Agents, the calls may be routed to recordings. The recordings can advise the callers that all Agents are busy, and that an Agent will answer as soon as possible. Various recordings may be provided to inform the caller as to call progress if an Agent is not accessed immediately, or to advise the caller of information the Agent will require when connection is established.

The 3300 ICP also directs calls to the Agent so that all Agents are given an equal workload. A Supervisor usually oversees the operation, monitors the activity of the Agents, and handles any situations that may arise.

About Your Phone

The Mitel 5212 and 5224 IP Phones are full-feature, dual port, dual mode telephones that provide voice communication over an IP network. Each features a back-lit liquid crystal display (LCD) screen, display-assisted access to features, on-hook dialing and off-hook voice announce with handsfree answerback, and a large ring/message indicator. The 5212 IP Phone offers 12 programmable keys, and the 5224 IP Phone offers 24 programmable keys for one-touch feature access. Both phones provide ten fixed feature keys for convenient access to features such as Conferencing, Redial, and many customizable user settings. The 5212 and 5224 IP Phones support Mitel Call Control (MiNet) protocols and session initiated protocols (SIP). The 5224 IP Phone also supports modules such as the Line Interface Module, 5310 IP Conference Unit, and the 12 and 48 Button Programmable Key Modules. The 5224 IP Phone can be used as an ACD Agent Phone or a Teleworker phone.

The personal key on the bottom right (5224) or bottom left (5212) is always your Prime Line; the remaining personal keys can be programmed as:

- Feature keys (for example, Swap). You can program feature keys from your phone, or using the Desktop Tool. Your administrator can also program feature keys.
- Speed Call keys. You can program speed call keys from your phone, or using the Desktop Tool.
- Line Appearances. Only the administrator can program line appearances.

Note: For more information on the Desktop Tool, talk to your system administrator.

Figure 1: 5224 IP Phone

NN0192

Figure 2: 5212 IP Phone

NN0191

Elements of Your Phone

Element	Function
❶ Display	Provides a two-line, 20-character liquid crystal display (LCD) viewing area that assists you in selecting and using phone features, accessing your voice mail, and identifying callers. When you are using the Superkey menu interface, prompts and feature information appear on the display screen. For information on selecting menu options with or without softkeys, see "Selecting Menu Options" in this guide.
❷ Softkeys (5224 IP Phone only)	Context-sensitive keys change depending on the modes of the operation and the menu currently displayed. Softkeys enable you to easily view and select a variety of features.
❸ Ring/Message Indicator	Flashes to signal an incoming call and to indicate a message waiting in your voice mailbox.
❹ Volume, Speaker and Mute Controls	Provide the following audio control capability: • ⬆ (**UP**) and ⬇ (**DOWN**) provide volume control for the ringer, handset, and handsfree speakers. • ⏪ (**SPEAKER**) enables and disables Handsfree mode. • ⏺ (**MUTE**) enables Mute, which allows you to temporarily turn your phone's handset, headset, or handsfree microphone off during a call.
❺ Fixed-Function Keys	Give you access to the following phone functions: • ⬚ (**SUPERKEY**): provides access to menus for your phone's additional features. **Note**: When navigating through Superkey menu options, press ⊗ or ⬚ to back up one menu level. • ⊗ (**CANCEL**): ends a call when pressed during the call, and, when you are programming the phone, eliminates any input and returns to the previous menu level. • ¹²³⤵ (**REDIAL**): calls the last number dialed. • ⬚☎ (**HOLD**): places the current call on hold. • ⤳⎥♒ (**TRANS/CONF**): initiates a call transfer or establishes a three-party conference call. • ✉ (**MESSAGE**): provides access to your voice mailbox and flashes to notify you of messages waiting in your voice mailbox. **Note**: The Ring/Message indicator (❸) also flashes when messages are waiting.
❻ Keypad	Use to dial.
❼ Programmable Personal Keys and Designation Card	Provides 24 keys that can be programmed as speed call keys, feature keys, or line appearance keys, according to your communication needs. Personal keys have status indicators. On a 5224 IP Phone, the bottom right personal key is always your Prime Line key. On the 5212 IP Phone, the bottom left personal keys is always your Prime Line key. Write the name (speed call, feature or line appearance) of the

	Personal keys that you program on the **designation card** (use the side of the card with the textboxes provided). Use the slot behind the plastic cover at the bottom of the phone to remove/insert the designation card.
❽ Handsfree Speaker	Provides sound for Handsfree calls and background music.
❾ Handset	Use for handset calls. If you are in headset or handsfree mode, you do not need to use the handset.

Ring/Message Indicator

When indicator is…	it means that…
Flashing rapidly	Your phone is ringing
Flashing slowly	A Message or Callback Message is waiting at your phone
On	Your phone is ringing another phone
Off	Your phone is idle, or you are on a call

Selecting Menu Options

Because the 5224 IP Phone offers softkeys, feature availability and menu options for the 5212 and 5224 IP Phones may differ.

To select menu items on the display:

- On a 5224 IP Phone, press the softkeys.
- On a 5212 IP Phone, press *****, **0** and **#** on the keypad. For example, if options *****=YES, **0**=DEFAULT, and **#**=NO appear and you want to select YES, press *****.

Procedures in this guide show all menu selection options, where applicable—for example, "Press the ***** or **Yes** softkey". Procedures in this guide also specify when a menu option is available on only one of the phones—for example, "On a 5224 IP Phone only, press the **Save** softkey".

Using Your IP Phone in Remote Mode

Remote Mode allows the 5212 and 5224 IP Phones to be used in the home or in other locations away from the office. For information on how to program your IP Phone for remote operation, refer to the *Remote IP Phones Guide* available at www.mitel.com .

About Feature Access Codes

Use of some features requires dialing access codes. The codes are flexible and may be different than those in this guide. Ask your Administrator for a list of codes you should use.

For Users on Resilient 3300 ICP Systems

If during a call, you hear two beeps that is repeated every 20 seconds it means that your phone is switching to a secondary 3300 ICP system. The call continues but some of the keys and features on your phone function differently. The keys and features begin working normally again after you hang up. If your phone switches to the secondary system while your speaker or handset is muted (that is, while the 🎤 **MUTE** key light is on), the call remains muted until you hang up. Normal operation resumes when your phone switches back to the primary system. If your phone is idle and switched to the secondary system, you'll see a flashing rectangle on the display. The rectangle remains until the switch to the primary system is complete.

5224 IP Phone and Line Interface Module

The Line Interface Module is an optional device that adds an analog phone line (POTS) capability to your 5224 IP Phone (only). If Emergency Call Routing is not programmed on your 3300 ICP, you must use the Line Interface Module to dial emergency calls. For more information on emergency number dialing, refer to Emergency Calls.
If you have a Line Interface Module connected to your 5224 IP Phone, all programming of the Line Interface Module, except the Analog Key, is done by the Installer when your phone is installed. For more information, refer to "Using the Line Interface Module" in this guide.

Note: The 5212 IP Phone does not support the Line Interface Module.

Tips for Your Comfort and Safety

Don't cradle the handset!

Prolonged use of the handset can lead to neck, shoulder, or back discomfort, especially if you cradle the handset between your ear and shoulder. If you use your phone a lot, you may find it more comfortable to use a headset. See the section on headset usage in this guide for more information.

Protect your hearing

Your phone has a control for adjusting the volume of the handset receiver or headset. Because continuous exposure to loud sounds can contribute to hearing loss, keep the volume at a moderate level.

Important Note for Headset Users: Mitel Headsets with Feature Control Switch must be installed in the dedicated headset jack (the jack on the back of the phone). Installation will disable your handset microphone. Disconnecting the headset at the jack or at the quick-disconnect plug restores handset operation.

Feature Access Codes

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

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

Contact your System Administrator for these and other Feature Access codes available on your telephone system, or to have these features programmed to be activated by a Feature Key. Record your Feature Access codes in the Personal Directory table at the end of this guide.

For Agents on Resilient 3300 ICP Systems

If you hear two beeps repeated every 20 seconds during your call, it means that your phone is switching to a secondary 3300 ICP system. Your call continues. Normal operation resumes when your phone switches back to the primary system. If your phone is idle and switched to the secondary system, you'll see a flashing rectangle on the display. The rectangle remains until the switch to the primary system is complete.

Features Not Available

There may be procedures in this guide that you cannot perform on your telephone, and your display may not appear exactly as described in this guide. You may also have additional functionality not described in this guide. The reason for this is that your company has specially selected your features and calling privileges. See your System Administrator if you have any questions.

ACD Agent Features and Capabilities

What are Agent Groups?

ACD Agents are normally grouped together to handle incoming telephone calls that are associated with particular functions or departments in an organization; for example, Sales or Engineering. Callers are then directed to the Group that best serves their needs. The formation of ACD Agent Groups with two or more Agents in each Group allows calls to be handled on a Group basis rather than on an individual basis. An Agent can have multiple Agent ID's, but Agents can only have one Agent ID per group, and can only log in one Agent ID per telephone.

Agent Groups are assigned a unique 3-digit reporting number as well as an Agent Group directory number. You will use both of these numbers as discussed throughout this guide.

Agent Groups can be programmed to overflow between each other. This means that if activated, calls that are directed to one Agent Group can be programmed to overflow to other Agent Groups if the first Group was unavailable due to being in an overload condition. This overflow capability allows ACD calls to be handled, even though an Agent Group has been set in a Do Not Disturb mode.

You can have your set programmed to receive additional information concerning Group activity. This information is called Queue Threshold Alert and Queue Status. The following Agent functionality is described in this section:

Logging In describes the procedure for logging in to a telephone programmed for Automatic Call Distribution (ACD).

Displaying Agent Log-In Information describes the procedure for displaying your Agent I.D. number for verification after logging in.

Logging Out describes the procedure for logging out from a telephone programmed for ACD.

ACD Agent Hot Desking describes the functionality provided by this feature.

Answering Calls describes the procedure for answering ACD calls.

Using the Auto Answer Feature describes the feature that allows you to answer calls automatically after one short ring.

Using a Headset describes the procedure for installing and programming a headset for hands-free call answering.

Using and Canceling the Work Timer describes the purpose of the Work Timer and the procedure for answering calls without waiting for the timer to expire.

Taking a Break from Calls (Make Busy Feature) describes the procedure for placing your set in a pause mode when you need to be away from your set for brief periods of time, without the need to log out and subsequently log in again.

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

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

Logging In

Automatic Call Distribution (ACD) 2000 calls are directed to Logged In Agents only. ACD calls are not directed to a telephone where there is no Agent Logged In. You can log in by following the procedure described below.

An important concept in the ACD 2000 system for you to be aware of is agent mobility. Since you as an Agent are assigned a 1- to 7-digit Identification (I.D.) number to log in with, you can be called by this I.D. number, as well as by the telephone extension number where you are working. This means that you can be called by your I.D. number regardless of where you may be located. For this reason, it is also a good idea for your Agent I.D. number to be included in your company's telephone directory.

As an Agent, you can belong to multiple groups. When you log in using your Agent I.D., you are automatically logged in to all groups in which you are a member. Check with your manager if you do not know the ACD Log-In access code or do not have an I.D. number. The Agent I.D. number is unique to each Agent, and allows the system to distribute ACD calls to Logged In Agents. An Agent can stay logged in indefinitely on the same telephone. You can also log in by using an alternative Feature Access code not explained in this guide.

NOTE: *If the I.D. is in use by another Agent, or the I.D. is invalid, the Log-In procedure is terminated. If an Agent Log-In code is dialed, but no I.D. is entered within 60 seconds, the Log-In procedure is not activated and your set is treated as a Logged Out set.*

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

When You Are Ready to Log In

To log in, perform the following tasks:

1. Press the *SuperKey* Function Key. The prompt AGENT LOGIN?
   appears. Press the **Yes** softkey.
   or
   Enter the Agent Log-In feature access code.

2. Enter your Agent I.D. code on the keypad.

3. Press #. Your set briefly displays LOGIN.

Displaying Agent Log-In Information

It is possible to display and verify Log-In information when you are logged in to a
set. The information displayed is the Agent I.D. number logged in to that set. To
display Agent Log-In information

1. Press the *SuperKey* Function Key,

2. Press # until PERSONAL KEYS appears on the display.

3. Press * and the Agent Identification (I.D.) number currently logged in
   will be displayed for 3 seconds.

4. The prompt SELECT A KEY appears. You may select another Line
   Select Key for similar information if the set has more than one line
   appearance.

   If you press your Prime Line Key, your display shows your Agent I.D.
   number and your name (if programmed).

5. To exit, press the *SuperKey* Function Key.

About ACD Agent Hot Desking

The ACD Agent Hot Desking feature allows you to log into any ACD set and the system
automatically configures the set with your personal speed calls, features, and phone
settings. If your user profile is configured as an ACD hot desk agent, when you log into
an ACD set, the system associates your personal phone settings, such as directory
number, system settings, language display, and button programming with the set.

For example, you could log into an ACD set, dial a number, and the system stores that
number against the **Redial** key for your set profile. After logging out, if you log into
another ACD set, you can press the **Redial** key to dial the last number that you had
dialed previously while you were logged into the other set.

After logging in as an ACD hot desk agent, you can use the following personal phone features and change the following settings:

- Call forwarding (all types)
- Callback messages (message waiting indicator)
- Auto Answer
- Do Not Disturb (DND)
- Last Number Redial
- Timed Reminder
- Triple Ring Callbacks
- Advisory Status Message.

The log in and logout procedures are the same for an ACD Hot Desk Agent as they are for a normal ACD agent.

Logging Out

Logging out returns the set to Make Busy and it no longer receives Automatic Call Distribution (ACD) calls, since ACD calls are directed to Logged-In telephones only. Your set operates normally for non-ACD use when logged out.

Logging Out can be activated during a call in progress, and takes effect only when you terminate (hang up) the call. This allows you to activate this feature before your set can ring again for another call.

When You Are Ready to Log Out

To log out, perform the following tasks:

1. Press the **Agent Log-out** Feature Key
   or
   enter the Agent Log-out feature access code.

2. Press the **Cancel** Function Key.

Answering Calls

Answering ACD calls is not unlike answering regular calls. When the telephone rings, the indicator beside your Line Select Key flashes.

To answer the call, pick up the handset and begin speaking.

A headset option can be programmed into your system, eliminating the need to pick up the handset. This is helpful in high call traffic situations normally encountered in an ACD environment. To use a headset, refer to "Using A Headset". You should also refer to "Using the Auto Answer Feature" for high telephone traffic situations.

Using the Auto Answer Feature

You may prefer to answer your calls automatically using the Auto Answer feature, for either handset or headset operation. Once programmed, when you receive a call you hear one short ring before being automatically connected to the caller.

Never leave your telephone unattended while the Auto Answer feature is turned on.

Activating Auto Answer

To activate the Auto Answer feature:

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

Deactivating Auto Answer

To deactivate the Auto Answer feature:

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

Using a Headset

Note: Your system administrator may have enabled full-time headset operation on your telephone. Telephones with full-time headset operation enabled must be operated only with headsets.

*Telephones that are not programmed for full-time headset operation will have a **HEADSET** key to allow you to switch between handset and amplified headset (no feature control switch) operation.*

Switching between handset and headset mode when using a Headset with Feature Control Switch can be accomplished by connecting or disconnecting the headset at the quick-disconnect plug on the headset cord, but you should also disable headset operation if the handset will be used for an extended period of time.

A headset can be used either in regular answer mode or with the Auto Answer feature programmed.

Most headsets are installed using the same jack that the handset plugs into. Mitel

Networks Headsets with Feature Control Switch (PN 9132-800-500-NA/ 9132-800-501-NA) plugs into the dedicated headset jack (the jack nearest the front of the set).

Installing a Headset (no Feature Control Switch)

To install the headset for your use, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Unplug the handset cord where it connects to the telephone.

3. Plug in the headset cord in the same place.

4. Set the telephone upright and press the **Headset** Feature Key.

5. Store your handset in a safe place.

To return to handset operation, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Unplug the headset cord where it connects to the telephone.

3. Plug in the handset cord in the same place.

4. Set the telephone upright and return the handset to the cradle.

5. Press the **Headset** Feature Key.

6. Store your headset in a safe place.

Handling Calls with a Headset (no Feature Control Switch):

To answer a call (when Auto Answer is disabled):

- Press the flashing Line Select key.

To hang up:

- Press the **Cancel** Function Key.

Installing a Headset with Feature Control Switch

IMPORTANT NOTE: Mitel Networks Headsets with Feature Control must be installed in the dedicated headset jack (the jack nearest the front of the set).

Installation will disable your handset microphone. Disconnecting the headset at the jack or at the quick-disconnect plug restores handset operation.

To install the headset for your use, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Plug the headset cord into the headset jack (the jack nearest the front of the set).

3. Set the telephone upright and return the handset to the cradle.

4. Press the **Headset** Feature Key.

To return to handset operation, perform the following tasks:

1. When the telephone is not in use, lift the handset from the cradle and carefully turn the set upside down.

2. Unplug the headset cord where it connects to the telephone.

3. Set the telephone upright and return the handset to the cradle.

4. Press the **Headset** Feature Key.

5. Store your headset in a safe place.

Handling Calls with a Headset (with Feature Control Switch):

To answer a call (when Auto Answer is disabled):

- Press the flashing Line Select key
  -or-
  Quickly press and release the Feature Control Switch.

To mute the headset microphone:

- Press and hold the Feature Control Switch.

To hang up:

- Press the **Cancel** Function Key
  -or-
  Quickly press and release the Feature Control Switch.

Using and Canceling the Work Timer

The Work Timer provides a delay after each ACD call, before the next call is directed to you. This gives you a certain amount of time to compete any work generated by the previous call.

The Work Timer is automatic and you are not required to perform any procedures to activate it. The length of time provided by the timer varies from 0 to 600 seconds, and is programmed only by the System Administrator.

Work Timers apply to ACD Agents and ACD calls only. Other calls to and from your set do not activate a Work Timer. If the Make Busy or Do Not Disturb features are activated at your telephone, the Timer is cancelled for that call.

Once you terminate an ACD call, WORK TIMER appears on the display for the duration of the Work Timer period. When the Work Timer expires, WORK TIMER disappears from the display and you are ready to take another call.

You have the option of canceling the Work Timer and accepting another call before the Timer expires. Cancellation of the Timer affects only the next ACD call.

To cancel the Work Timer, press the **Cancel** Function Key. Your set displays the normal screen and is now available for the next ACD call.

Taking a Break from Calls
(Make Busy Feature)

Activate the Make Busy feature to stop receiving Automatic Call Distribution (ACD) calls at your set for relatively brief periods of time, thereby avoiding the need to log out and subsequently log in again. Make Busy ensures that your ACD set does not receive calls while you are unavailable to handle the calls.

Your Mitel IP Phone operates as a normal telephone except for ACD use during the Make Busy state. You can activate this feature between calls or during a call in progress. The Make Busy state commences upon completion of that call. This allows you to activate this feature before your set can ring again for another call.

Activating Make Busy

To activate the Make Busy feature:

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

Removing Make Busy

To deactivate the Make Busy feature:

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

Note: Your System Administrator can configure the system to automatically place your set in Make Busy when you log in. In this case, you must remove Make Busy before you can start taking ACD calls.

Queue Threshold Alert

Thresholds are programmed into the ACD system to provide a basis for alerting Agents and Supervisors that calls have waited longer than acceptable limits (thresholds) to be answered.

If your set is programmed with a Generic Group **Queue Status** Feature Key, it can provide a visual indication of the current workload conditions of the Automatic Call Distribution (ACD) Group into which you are logged. Your set may also be programmed to provide an audible alert that Queue Status has changed.

Note: Agents in the Logged Out, Do Not Disturb, or Make Busy states are not considered active Agents for the purpose of Queue Threshold Alert.

Visual Indications

If your set is programmed to provide a visual alert, the indicator beside the **Queue Status** Feature Key indicates the three levels of alert as follows:

- a solid indicator beside the Line Select Key on your set indicates that the workload is below the first threshold limit programmed

- a slowly flashing indicator indicates that the workload is above the first but below the second threshold limit programmed

- a quickly flashing indicator indicates that the workload is above the second threshold limit programmed.

Audible Indications

For sets programmed for audible indications, the system provides the following different ringing patterns, depending on the threshold alert status:

- a single ring occurs when the longest waiting caller exceeds the programmed first threshold time interval

- a double ring occurs when the longest waiting caller exceeds the programmed second threshold time interval

- a single or double ring occurs when a previous threshold time interval is reverted to (i.e., when the longest waiting call is answered and the next longest waiting caller is in a different threshold level).

Displaying Queue Status

Agents may access the following queue-status information about their Group:

- the number of active Agents in the Group

- the number of calls waiting for the Group (queue)

- the length of time that the longest call has been waiting for the Group.

Note: Agents in the Logged Out, Do Not Disturb, or Make Busy states are not considered active Agents for the purpose of Queue Status.

When You Need To Know Your Group's Queue Status

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

Personal Directory

Your Extension Number: _____

Your Agent I.D. Number: _____

Your Supervisor I.D. Number: _____

Your Group Name/Number: _____

Use this table to record your frequently used numbers.

Name	Number

Use this table to record the feature access codes you are most likely to need on your telephone.

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