
CHAPTER 11

Automated Transcriptions



This chapter shows you how to configure, implement, and use Automated Transcriptions – a powerful tool for automating the collection of caller data during peak inbound loads. The following topics are covered.

- What are Automated Transcriptions? (*page 1*)
- Configuration (*page 1*)
- Using Automated Transcriptions (*page 13*)
- Troubleshooting and Maintenance (*page 16*)

What are Automated Transcriptions?

With Automated Transcriptions (AT), callers on designated pilots are offered the option to enter data when an agent is not readily available, or when the information can be collected without using high-priced agents. Callers are prompted to input a mix of touch-tone data and spoken information as appropriate to the AT scenario defined. The transcription calls are logged by APM, then sent to agents as they become available, ensuring that transcription sessions are handled without disruption of other, more time-sensitive tasks. Transcribed information is presented to agents in combination of both spoken and visual formats, according to the configuration preferences for that AT scenario.

Configuration

This section is a comprehensive guide to configuring all required Auto Transcription components on CTI Server and in the PBX/ACD. On the server, Auto Transcriptions are configured in three forms: TFB Pilot Parameters form, the Auto Transcriptions Parameters form, and the Auto Transcriptions questions form.

Configuring Auto Transcriptions on CTI Server




The following three components of Auto Transcriptions must be configured on CTI Server.

- **Pilot Parameters** – in the TFB Pilot Parameters form.
- **Auto Transcription Parameters** – in the Auto Trans Parameters form.
- **Auto Transcription Questions** – in the Auto Trans Parameters Questions form.

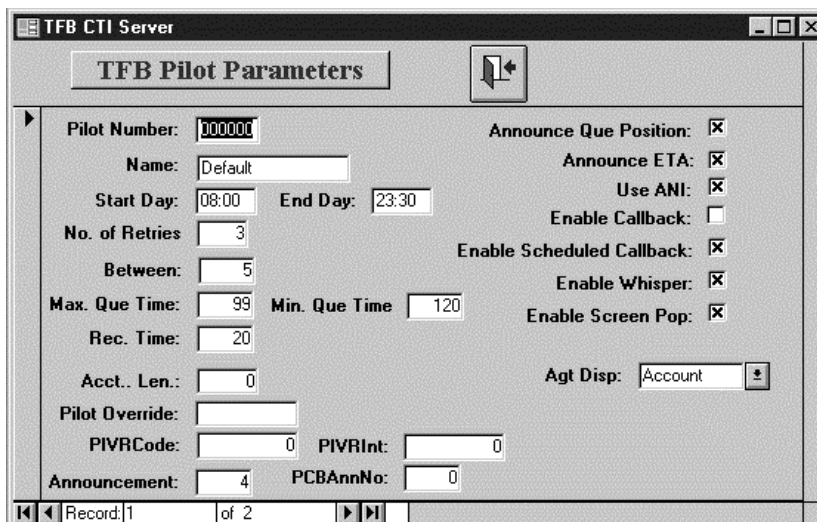
Specifying Pilot Parameters for Auto Transcriptions

First, open the TFB Pilot Parameters form to designate the pilots that will offer Auto Transcriptions to callers. Unlike Callback and Queue/ETA, AT options aren't configured directly in this form – the pilot is merely designated for AT use, and the AT scenario number is specified.

To open the TFB Pilot Parameters form

- 1 Double-click the TFB Configuration icon on the CTI Server desktop.  TFB Configuration
- 2 Click the **Config.** button.  (some APM versions may not require this!)
Config
- 3 Click the **Callback Parameters** button.  Callback Parameters

The TFB Pilot Parameters configuration form opens.



Pilot Number:	<input type="text" value="000000"/>	Announce Que Position:	<input checked="" type="checkbox"/>
Name:	<input type="text" value="Default"/>	Announce ETA:	<input checked="" type="checkbox"/>
Start Day:	<input type="text" value="08:00"/>	End Day:	<input type="text" value="23:30"/>
No. of Retries:	<input type="text" value="3"/>	Use ANI:	<input checked="" type="checkbox"/>
Between:	<input type="text" value="5"/>	Enable Callback:	<input type="checkbox"/>
Max. Que Time:	<input type="text" value="99"/>	Enable Scheduled Callback:	<input checked="" type="checkbox"/>
Min. Que Time:	<input type="text" value="120"/>	Enable Whisper:	<input checked="" type="checkbox"/>
Rec. Time:	<input type="text" value="20"/>	Enable Screen Pop:	<input checked="" type="checkbox"/>
Acct. Len.:	<input type="text" value="0"/>	Agt Disp:	<input type="text" value="Account"/>
Pilot Override:	<input type="text"/>		
PIVRCode:	<input type="text" value="0"/>	PIVRInt:	<input type="text" value="0"/>
Announcement:	<input type="text" value="4"/>	PCBAnnNo:	<input type="text" value="0"/>

Record: 1 of 2

Designating AT Pilots

This form allows you to configure Auto Transcription scenarios uniquely by pilot number.

A caller on a particular pilot is offered an Automated Transcription when,

- CTI Server receives an *IVR Announcement 9* via *Infolink*, from that pilot's CCV.
– AND –
- **PIVRCode** is set to '90000' in the Pilot Parameters form for that Pilot.
– AND –
- **PIVRInt** contains a valid AT scenario number
– AND –
- The scenario specified in **PIVRInt** is defined in the AT Parameter form.

To define AT Pilot Parameters

In the TFB Pilot Parameters form...




- 1 Enter the **Pilot Number** to be defined. You can also click the left/right arrow buttons at the bottom of the window to scroll through existing Pilots. Any call on a pilot not specified in the configuration will be handled according to the definition of default, Pilot Number 000000. Furthermore, the default should generally *not* be configured for AT. It's more useful as a catch-all for handling Callbacks and Queue/ETA services. Also, enter the pilot **Name** (optional). The name is there for your reference, and for reporting purposes.
- 2 Enter '90000' in **PIVRCode**, to designate this pilot as an AT pilot. All Callback and Queue/ETA-related options will be ignored once this is set.
- 3 Enter an AT scenario number (1-9999) in **PIVRInt**. This number is user-defined and may be any integer from 1 to 10000, provided it's unique to this pilot, and corresponds to an AT scenario configured as shown in the next section, "*Specifying Parameters for AT Scenarios*".

REPEAT THESE STEPS FOR EACH PILOT YOU WANT TO CONFIGURE WITH AT.

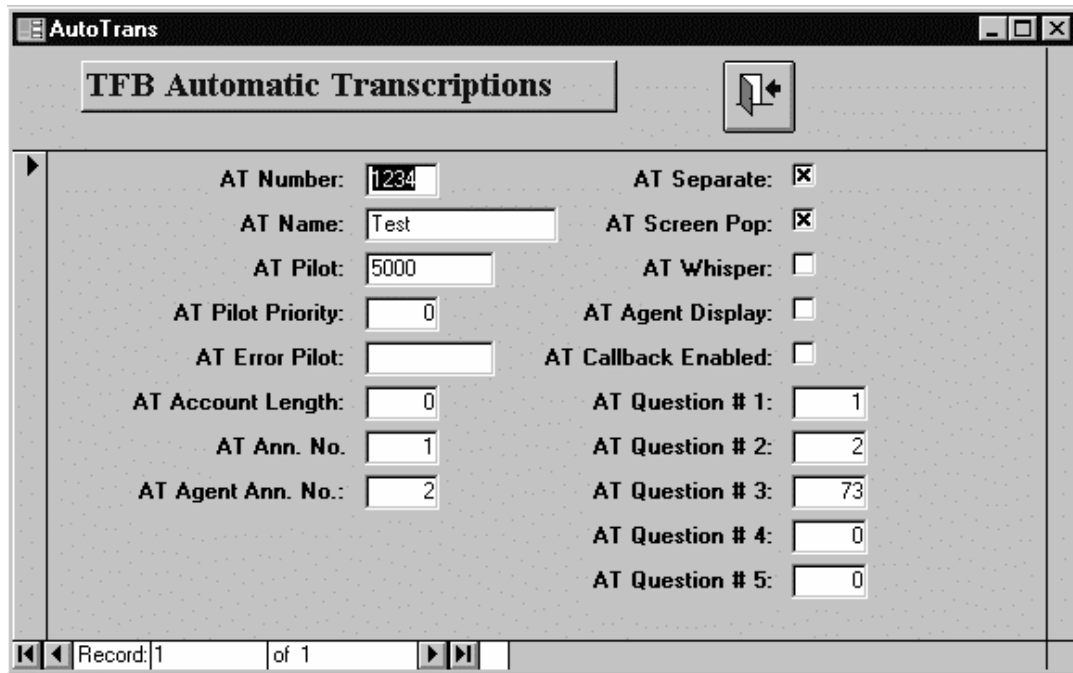
Defining AT Scenarios

AT scenarios are defined in the Auto Transcriptions Parameters (ATP) form, and the AT Questions (ATQ) form. Open the form and enter the required parameters.

To open the AT Parameters form

- 1 Double-click the TFB Configuration icon on the CTI Server desktop. 
- 2 Click the **Config.** button.  (some APM versions may not require this!)
Config
- 3 Click the **Auto Transcription Parameters** button. 
Auto Transcription Parameters

The TFB Auto Transcriptions Parameters form opens.



TFB Automatic Transcriptions

AT Number: <input type="text" value="1234"/>	AT Separate: <input checked="" type="checkbox"/>
AT Name: <input type="text" value="Test"/>	AT Screen Pop: <input checked="" type="checkbox"/>
AT Pilot: <input type="text" value="5000"/>	AT Whisper: <input type="checkbox"/>
AT Pilot Priority: <input type="text" value="0"/>	AT Agent Display: <input type="checkbox"/>
AT Error Pilot: <input type="text"/>	AT Callback Enabled: <input type="checkbox"/>
AT Account Length: <input type="text" value="0"/>	AT Question # 1: <input type="text" value="1"/>
AT Ann. No. <input type="text" value="1"/>	AT Question # 2: <input type="text" value="2"/>
AT Agent Ann. No.: <input type="text" value="2"/>	AT Question # 3: <input type="text" value="73"/>
	AT Question # 4: <input type="text" value="0"/>
	AT Question # 5: <input type="text" value="0"/>

Record: 1 of 1

TFB Automated Transcriptions Form

Field	Use
AT Number	Auto Transcription scenario Number. Must match the PIVRInt field in the Pilot Parameters form for the desired incoming pilot.
AT Name	Name of AT scenario. For user's reference.
AT Pilot	Pilot used to send the transcription. Note that this isn't the incoming pilot used to offer the AT, but rather the pilot used to prompts agents for the transcription.
AT Pilot Priority	ACD Priority for this transcription (1-255). Controls the priority of an agent transcription session relative to incoming calls, and other call-types.
AT Error Pilot	Not used at this time.
AT Account Length	Length to prompt for account number. 0 is N/A.
AT Ann. No.	Initial caller greeting for this transcription.
AT Agent Ann. No.	Initial announcement to transcription agent.
AT Separate	Specifies answers to be spoken individually to transcription agent. If not selected, answers are spoken consecutively, with no pause between them.
AT Screen Pop	Enable screen pop of caller data when transcription is sent to an agent.
AT Whisper	Speak account number to agent.
AT Agent Display	Not used at this time.
AT Callback Enabled	Not used at this time.
AT Question # 1 - 5	Questions configured for this transcription scenario.

To specify AT Scenarios

In the Auto Transcriptions Parameters form...




- 1** Enter the **AT Number** to be defined. You can also click the left/right arrow buttons at the bottom of the window to scroll through existing AT Numbers.
- 2** Enter the **AT Name** for reference and for use in AT reporting features.

- 3** Enter the **AT Pilot** to use for sending transcriptions to agents.

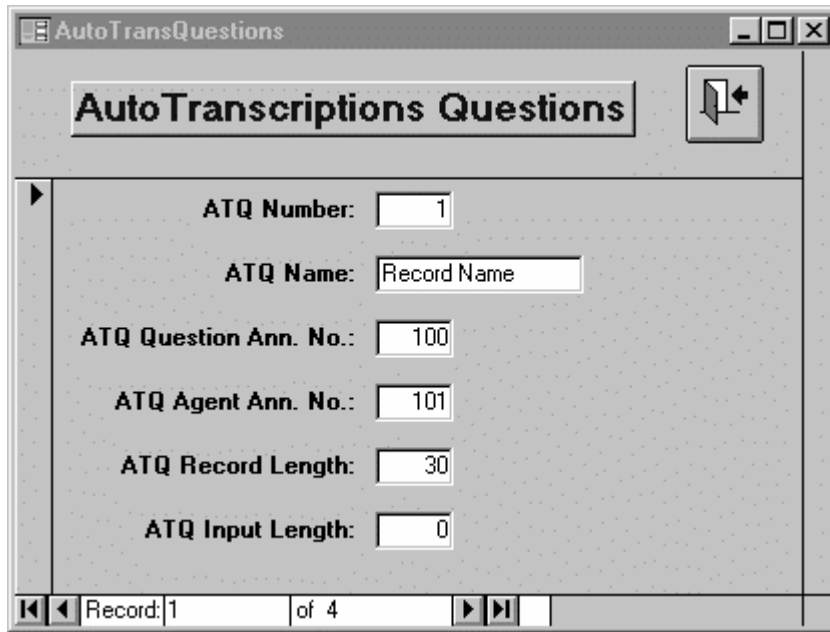
Enter the **AT Pilot Priority**. This is the ACD priority to use for queuing AT sessions for agent transcription. Priority can be 1 to 255, where 1 is the highest priority. For example, you would enter '255' if you wanted all other calls to be handled before sending agents a transcription.
- 4** Enter the **AT Account Length** to if you want callers to be prompted to enter an account number via touch-tone. This is the maximum number of allowable touch-tone digits. Enter zero if you don't want to enable this function.
- 5** Enter the number of the greeting announcement to play to callers in **AT Ann. No.**.
- 6** Enter the number of the initial announcement to play to agents when they are sent a transcription from this AT scenario in **AT Agent Ann. No.**.
- 7** Select **AT Separate** to allow agents to playback each transcription answer with a key press. Deselect this to play transcription answers to agents consecutively, with no pause between questions, and no playback control.
- 8** Select **AT Screen Pop** to display caller information on agents' desktops in coordination with the transcription session.
- 9** Select **AT Whisper** to if you want agents to hear the caller's account number spoken at the start of the transcription session. Of course, you must have configured this scenario to prompt the caller for an account number in Step 5.
- 10** Enter question numbers in **AT Question # 1 – 5**. Enter '0' for 'none'. These numbers must match the question numbers as configured in the following procedure "Specifying AT Questions." You can refer to the same question in multiple AT scenarios if you wish. Questions can require the caller to speak an answer, or to enter touchtone input as you desire.

REPEAT THESE STEPS FOR EVERY AT SCENARIO YOU WISH TO DEFINE.

To open the AT Questions form

- 1 Double-click the TFB Configuration icon on the CTI Server desktop.  TFB Configuration
- 2 Click the **Config.** button.  (some versions may not require this step!)
Config
- 3 Click the **Auto Transcription Questions** button.  Auto Transcription Questions

The TFB Auto Transcriptions Questions form opens.



AT Questions Form

Field	Use
ATQ Number	Auto Transcription Question Number as specified in the Question fields of the AT Parameters form.
ATQ Name	Name of question. For your reference.
ATQ Question Ann. No.	AT Announcement number used to prompt caller.
ATQ Agent Ann. No.	AT Announcement number to preface each answer for the transcription agent. Only used if Separate selected.
ATQ Record Length	Maximum Length (seconds) of caller's recorded answer.
ATQ Input Length	Maximum Length (number of digits) of DTMF input.

To define Auto Transcription Questions

In the Auto Transcriptions Questions form...

- 1** Enter the **ATQ Number** to be defined, or click the left/right arrow buttons at the bottom of the window to scroll through existing questions.
- 2** Enter a descriptive **ATQ Name** for your reference. (optional)
- 3** Enter the announcement number spoken to callers in **ATQ Question Ann. No.** This announcement is the recorded question, typically something like, “Please speak your first and last name after the tone...”.
- 4** Enter the announcement number spoken to agents in **ATQ Agent Ann. No.** This announcement prefaces the caller’s answer to the question during the agent transcription session. Note that this announcement is played to agent only if the **Separate** option is enabled for the AT Scenarios that use this question. Otherwise, caller answers are spoke one after the other, with no prompts in between.
- 5** If the AT question requires a spoken answer, enter the maximum number of seconds you wish to allow for the answer in **ATQ Record Length**. If the answer requires touchtone input, enter ‘0’ in this field.
- 6** If the AT question requires an answer in the form of touch-tone input, enter the maximum number of allowable digits in **ATQ Input Length**. If a spoken answer is required, enter ‘0’ in this field.

REPEAT THESE STEPS FOR ALL QUESTIONS REFERENCED BY YOUR AUTO TRANSCRIPTION SCENARIOS.

TIP Note that for every **AT Question Ann. No.**, there is an associated **AT Agent Ann. No.**, so there is essentially a matching pair of announcements required for each question you define. It's helpful to establish and follow a numbering convention for these announcements such that you can tell just by their numbers which are paired together. For instance, if you assigned all customer questions to the 100-199 range, their complimentary agent prompts could be in the 200-299 range. In that scheme, the announcement for question 1 would be 101, and the associated agent prompt would be announcement 201, etc. Whatever number scheme you choose, ensure that it fulfills these three criteria: 1) The announcement numbers correspond to the question numbers in an intuitive way 2) It's easy to determine from just the announcement numbers which is a customer prompt and which is an agent prompt 3) It's easy to determine from the announcement numbers which customer prompt matches which agent prompt.

Recording Announcements for Auto Transcriptions

The wonton and reckless use of the words “Announcement”, “Prompt”, and “Recording” throughout the CTI world could hardly be more perplexing. The fact is, they're all just spoken recordings, and in TFB's system, voice recordings are all stored in the same file format, no matter what they're called. Different names are used simply to denote different contexts, or the products used to play them. The actual file is saved in different directories on CTI Server, depending on the associated application. All recordings for AT, for instance, are stored in the `tfb\dvps\at` directory, and each file name is identical to its associated announcement number.

There are four distinct contexts in which AT announcements are played: 1) As a greeting to callers at the beginning of their AT session 2) As questions played to prompt callers for the desired information 3) As a greeting to agents when a transcription session is routed to their position 4) As a prompt played to agents to identify the questions just prior to playing each answer. You can use any AT Announcement numbers from 1 to 9999, but it's a good idea to set number ranges for the announcements you plan to use in each context. That way, whether specifying a number for recording or in the configuration, you can intuitively number the question announcements without having to keep a specific list.

First script your announcements, ensuring that all the pertinent information is included in each one, then create the desired announcements using the TFB Recording Utility.

Scripting Announcements

There are several key instructions to include in your recordings, to assist both agent and caller interaction with AT.

1. In your caller greeting for each AT scenario, be sure to include a brief description of how to enter data. Caller's should know that they need to enter '#' after keying in data from their touchtone pad, and that spoken input is saved after the caller stops speaking.
2. In your agent greeting for each AT scenario, be sure to include a brief description of the data collected, and any special instructions for the transcription.
3. In your recorded customer question, be sure to indicate whether the question requires touchtone input, or a spoken answer (it can only be one or the other). Remind the caller also to press '#' after touchtone input.

After your scripts are complete, you can create the desired announcements using the TFB Recording Utility as described in the following procedure.

To record AT Announcements

- 1 Start the TFB recording utility by dialing the pilot configured to send *IVR Announcement 99 (the "Recording Pilot")*.
- 2 Enter '1234#' when prompted for a password.
- 3 Enter '1' for English, '2' for Spanish (language-enabled systems only!)
- 4 Enter '1' to record ('2' to listen to what's already there).
- 5 When prompted for the type of announcement, enter '3' for AT Announcements.
- 6 Enter the AT Announcement number (from 1-9998).
- 7 Record the passage at the tone. Recording automatically stops when you stop talking for a full second. The utility then plays back the message automatically, for your review.

IMPORTANT This is a real time update! Be sure to check existing prompts prior to recording to ensure that you don't erase an announcement that's currently in use. Also, consider doing a backup of the `\fb\dvps\at` directory prior to a recording session.

You can check each recording for clarity, volume, and content by entering a '2' in Step 4. This is also a good way to double-check the content of an *existing* message before recording over it!

Configuring the PBX/ACD for Auto Transcriptions



To activate Auto Transcriptions, route calls to your AT scenarios by including an *IVR Announcement 9* in the CCVs for the desired pilots. APM then directs these calls according to the AT scenario specified for that pilot in **PIVRInt** on the TFB Pilot Parameters form. If you haven't already done so, you must also configure a separate UCD group to reserve IVR ports for announcing transcription information to agents.

To configure the PBX/ACD for Auto Transcriptions

- 1 Create an AT UCD Group with **Pilot number = IVR pilot + 1**.

For example, Main IVR UCD Group 5000
 First analog port 5000
 Agent UCD Pilot 5001

UCD Groups for an 8 port system

5000	UCD Group 1	IVR Port 1	
5001	UCD Group 2	IVR Port 2	← UCD Group for speaking transcription information to agents
5002	UCD Group 2	IVR Port 3	
5003	UCD Group 2	IVR Port 4	
5004	UCD Group 1	IVR Port 5	
5005	UCD Group 1	IVR Port 6	
5006	UCD Group 1	IVR Port 7	
5007	UCD Group 1	IVR Port 8	

APM automatically uses the group defined at **IVR Pilot + 1** to play agent prompts.

NOTE This UCD group can be shared by ASAP Callback, Scheduled Callback, Internet Callback, and Outbound Call Campaigns. It does not need to be recreated for each feature, although you may need to add an additional port(s) to group 2 because IVR port usage is typically heaviest for Automated Transcriptions. If you've already set up a separate UCD group for one of those features, you can skip this step.

- 2 To activate AT, create CCVs to route calls to AT scenarios by sending *IVR Announcement 9*.

SAMPLE Auto Transcriptions CCV

2)	Queue to	1	//queue to desired split
3)	ETA Greater	960	//you decide the criteria
▶ 4)	@IVR Announcement	9	
5)	Pause	30	
6)	Announce	1	
7)	Pause	30	
8)	Goto CCV step	6	

Using Automated Transcriptions

Interacting with the AT system may be a new experience for both callers and agents. Of course, you can't train callers to use your system, so the recorded prompts for callers must be clear and succinct.

Handling the Transcription Session

The accuracy of transcriptions is vulnerable at several points in the AT transaction, including the actual agent transcription session. Agent error has the potential to reduce the accuracy of AT-originated data.

To minimize agent error, ensure that transcription agents have read and understand the related procedures in the APM Agent User's Guide. Also, consider testing agents by logging them into a dummy transcription split and phoning in transcriptions on a test pilot.

An additional way to ensure accuracy is to automate as much of the transaction as possible using touchtone input from the caller, and fetch the desired data from screen pop message string when the call arrives at a transcription agent.

The Transcription Sequence

Agent Prompts:

- Preparing transcription for new member of 'Special Offers' mailing list.
- "The caller's name is..." "Bob Smith"
- "The caller's street address is..." "202 Zucker Lane"
- "The caller's city is..." "Busted Ratchet "
- "The caller's state is..." "Indiana"
- "The caller's zip code is..." "3-2-3-5-4-5-2" (spoken from DTMF input)

Consider using caller prompts that will help improve transcription accuracy: Please speak your first and last name, and spell any unusual name. When you're finished, press the pound key.

Using AT with Other CTI Components

Callers may arrive at AT after interacting with other CTI modules or even an agent. For instance, AT may merely be one of many options available from an Enhanced Automated Attendant menu. AT can produce tangible savings in agent cost by collected information after personal interaction with an agent. With most systems, once a call is answered, even a high-priced agent may conduct all necessary transactions with the caller, including very sophisticated tasks along with the mundane ones. It can be more productive to take care of the skill-intensive portion of a callers needs then pass the caller to AT for the more tedious task of collecting simple information, and later transcription by a more junior agent.

Where else might callers on AT have been routed from? The Auto Attendant, ANI Matcher, and Automated Outbound Campaigns can all act as a ‘front-end’ to Auto Transcriptions.

Piggy-backing AT Scenarios

What if you have a transcription session that requires more than five distinct questions? Because AT returns control of the call to the CCV, it is possible to ‘piggy-back’ several scenarios together by constructing two or more AT scenarios, then routing callers to each consecutively. Of course, this presents a potential problem on the transcription side, because each AT session is routed to the next agent available. If you “piggy-back” scenarios, any particular caller may have multiple different answers transcribed independently by different agents. If you have a high volume of transcriptions, you should only piggy-back AT scenarios if each component scenario is allowed to be transcribed separately, by separate agents.

Another way around this issue, especially in instances where the AT volume is relatively small, is to have only one agent logged into the transcription split at a time. New transcription sessions would be routed to that agent as the previous one was finished

AT Reporting

You can open a reporting window of AT transactions from the tools menu on CTI Server.

To display the Auto Transcriptions Report

- Click **Reports | Auto Transcriptions** in the CTI Server main menu.
- A Windows Notepad opens with the AT Report

- If you want to print the report, click **File | Print**.
- If you want to save the report, click **File | Save As**, and enter a new path and filename.

Troubleshooting and Maintenance

Automated Transcriptions require minimal maintenance unless the transaction questions change, or pilots must be redirected to or from this feature. Otherwise, you may optionally conduct tests the system, and do backups of configuration and related prompt files, as often as you require.

Maintaining Auto Transcriptions

You may optionally test the system, and do backups of configuration and related prompt files, as often as you require.

Operational Testing

Test Auto Transcriptions is by dialing the configured pilots, preferably through an outside line, and actually using the system as a caller. Consider doing this on a test pilot when you configure the system for the first time, and then calling the 'live' pilots during peak periods, as a more rigorous field-test. If you've personally designed the questions and prompts, also consider having someone unfamiliar with your system call in and try to use it. It's difficult to objectively evaluate your own instructions from a novice point of view, and a neophyte may shed some light on confusing or vague prompts.


Backing-Up Configuration and Prompt Files

You can back-up configuration files and recorded-prompt files from the CTI Server main menu. This is especially advisable after completing the initial configuration, and before *and* after making major changes. Auto Transcription files are backed-up as part of the CTI Server backup feature, but this is not automatic, and it further only creates a zip file, which must then be copied to another surface immediately for the back-up to be complete.

Redirecting Pilots

It's advisable to backup configuration and recorded-prompt files, especially after completing the initial configuration or making major changes.

Troubleshooting Guide: Automated Transcriptions

Problems / Questions	Solutions 
<p>Callers on certain pilots are not offered Auto Transcriptions.</p>	<ul style="list-style-type: none"> ■ AT is only provided by CTI Server when it receives an <i>IVR Announcement 9</i> over <i>Infolink</i>. Ensure the appropriate CCVs contain the line: <i>IVR Announcement 9</i> ■ Ensure the problem pilots are configured in TFB Pilot Parameters with PIVRCode = '90000' and a valid AT scenario in PIVRInt.
<p>Why does AT need the second UCD group to be defined as part of configuration?</p>	<ul style="list-style-type: none"> ■ The second UCD group is used only for speaking transcription prompts to agents via IVR ports. Two ports are the minimum needed to define a 'group', but you may need to add more ports if agents frequently report a 'fast-busy' when a Auto Transcription is generated, consider adding the next port in sequence to this group.

