Automatic Call Distribution

Supervisor User Guide

UCLA INFORMATION TECHNOLOGY SERVICES
Introduction

Automatic Call Distribution (ACD) is an advanced call-processing product, offering dynamic call distribution. It is a comprehensive system that offers complete call center management in one package. Features include incoming call priority levels, monitoring capabilities, call handling after business hours, enhanced call routing, and an interface with an ACD Management Information System (MIS).

This guide describes ACD features and services offered by IT Services to support departmental staff that handle business calls routed to the ACD. Some services or features described in this guide may not apply to your specific service. For instructions on the use of telephone equipment or features, refer to the Electronic Business Set (EBS) User Guide.

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Table of Contents

CALL PROCESSING
ACD Directory Number (DN) ........................................ 3
Agent Forced Off - Ring Threshold ............................ 3
Agent Position ......................................................... 3
Call Distribution ...................................................... 3
Call Forcing ............................................................ 3
Call Queue ............................................................. 3
Call Queue Parameters ............................................ 4
Forced Night Clearing ............................................... 4
Multiple ACD Groups .............................................. 4
Night Service .......................................................... 4
Overflow - Calls Deflected ....................................... 4
Personal Identification Number (PIN) ......................... 5
Pilot and Supplementary Numbers ............................. 5
Priority Promotion ................................................... 5
Supervisor Position ................................................ 5
Time Delay Overflow (TDO) ....................................... 5
Time Delay Threshold Route (TDTR) ......................... 5
Transfer Recall ...................................................... 5
Variable Wrap Up ................................................... 5

AGENT TELEPHONE FEATURES
ACD Group Log On/Off .............................................. 6
Answer Calls .......................................................... 6
Not Ready ............................................................. 7
Display Queue Threshold (DQT) ............................... 7
Line of Business (LOB) .............................................. 7

SUPERVISOR TELEPHONE FEATURES
Agent Status .......................................................... 8
Answer Agent ......................................................... 8
Answer Emergency ................................................ 8
Call Agent ............................................................. 8
Controlled Interflow ............................................... 8
Display Agent Activity Summary (DASK) ..................... 8
Display Queue Status (DQS) .................................... 9
Forced Agent Availability ......................................... 9
Night Service Key .................................................. 9
Observe Agent ....................................................... 9

RECORDED ANNOUNCEMENTS
Call Queue Announcements .................................... 10
Forced Announcements .......................................... 11

STAT-VU MESSAGING
View Messages ...................................................... 12
Configure Display Screen ....................................... 12
Font Settings ....................................................... 13
CALL PROCESSING

ACD DIRECTORY NUMBER (DN)
The ACD directory number (DN) identifies the agent position. Agents use the ACD DN to log on to the ACD group. The ACD DN receives inbound ACD calls and cannot be used to place outbound calls. However, an ACD call can be transferred to another agent’s position or to other campus numbers. An ACD DN starts with the prefix 221 and is programmed on key 1 (bottom right) of the ACD Electronic Business Set. In some cases, the ACD DN is labeled INCALLS.

AGENT FORCED OFF - RING THRESHOLD
Prevents a call from remaining unanswered at an agent (or supervisor) position. A timer is started when a call is distributed to an idle agent. If the agent does not answer the call before the timer expires, the agent is logged off the group and the call is rerouted to the next available agent. If no agent is available, the call is placed into the call queue. In this case, the waiting caller hears ringing until an agent becomes available. If all agent positions are forced off or logged off, the group is placed into Night Service.

AGENT POSITION
An ACD telephone set assigned to an agent’s workstation is called an agent position. The agent position is identified by the ACD campus number, referred to as the ACD directory number (ACD DN). Agent positions can be moved from group to group when managing multiple ACD groups and when equipped with an ACD MIS Remote Terminal.

CALL DISTRIBUTION
The ACD evenly distributes incoming calls to a group of ACD directory numbers, which are answered by telephone support staff called agents. Call distribution occurs when an ACD agent (or supervisor) logs on the group and is in an idle state. An access code or personal identification number (PIN) is used to log on.

CALL FORCING
Initiates the connection of an ACD call that is distributed to an idle agent position. The presented call is automatically answered to increase the speed of processing ACD calls. It eliminates the need for an agent to press the ACD DN or INCALLS. The agent hears a short ring or tone burst followed immediately by the active call. Call forcing is suspended when an agent is active on a secondary number or intercom line. Call forcing operates best when the agent position is equipped with a headset.

CALL QUEUE
The call queue holds incoming ACD calls when all active (logged on) agents are busy assisting other ACD callers. Calls that are waiting hear a pre-recorded announcement that identifies the place of business. Calls are distributed out of the call queue on a first in, first out basis (according to the priority level), as agents become available. There are three types of call queues: Physical Queue, Logical Queue and the Call Transfer Queue.

- **Physical Queue** - is the primary ACD call queue, which holds calls that are waiting for the next available agent. The Logical Queue and Call Transfer Queue reside within the Physical Queue for special handling of calls.
- **Logical Queue** - applies only to ACD applications that have multiple ACD groups. This queue holds overflow calls from another ACD group during peak call volume times. The calls wait for the first available agent in either group.
- **Call Transfer Queue** - holds calls that were transferred directly to an agent’s position that was busy during an agent-to-agent transfer. The transferred call waits in the Call Transfer Queue until the agent becomes available. This condition will also occur if the agent’s position is in Not Ready.
CALL QUEUE PARAMETERS
Queue parameters control the volume of calls and wait time of callers for an ACD group. There are two primary call queue parameters for the Physical Queue: Maximum Queue Size and Maximum Wait Time.

- **Maximum Queue Size** - sets the maximum number of calls that can wait in the physical call queue for the next available agent, which is defined by the quantity of queue slots. Once the queue size limit is reached (all queue slots are full), the queue closes. New calls are deflected to the Overflow destination. However, calls that were already waiting in the call queue continue to wait for the next available agent. The call queue remains closed until the queue size is less than the set maximum value.

- **Maximum Wait Time** - determines the maximum amount of time a call can wait in the physical call queue before the queue is closed. A timer is started for each call that enters the call queue. When the Maximum Wait Time is reached the queue is closed. New calls are deflected to the Overflow destination. However, calls that were already waiting in the call queue continue to wait for the next available agent. The call queue remains closed until the wait time is less than the set maximum value.

FORCED NIGHT CLEARING
This enhanced feature works with Night Service. When Night Service is activated by all agents logging off, calls waiting in the call queue are rerouted to the Night Service destination instead of being abandoned. If Night Service is activated by the supervisor, Forced Night Clearing is not invoked.

MULTIPLE ACD GROUPS
Multiple ACD groups can be assigned to one department’s ACD application to isolate and track call distribution by group. Each ACD group has a pilot number, call queues, and can have unique or shared Overflow and Night Service destinations.

Each ACD agent position can be moved from group to group when equipped with an ACD MIS Remote Terminal, to offer flexibility when staffing levels decrease or when group call volume increases. Call center supervisors and managers are able to utilize departmental-wide resources without relocating staff by moving agent positions using the remote terminal.

NIGHT SERVICE
Night Service offers telephone assistance for incoming ACD calls when all agent positions are logged off of the ACD group or when the supervisor activates **NIGHT SRVC**. This condition is typically initiated after business hours but can occur anytime in support of departmental meetings or emergencies.

When Night Service is activated, queued calls remain in the call queue. If the supervisor activates Night Service, agents can remain logged on to handle queued calls while new calls are routed to the Night Service destination. If Night Service is activated because all agents have logged off, queued calls will remain in queue until abandoned.

When Forced Night Clearing is assigned, queued calls are rerouted to the Night Service destination instead of waiting in the call queue. Night Service supersedes the Controlled Interflow feature.

OVERFLOW - CALLS DEFLECTED
Overflow is a destination for handling incoming ACD calls when the physical call queue is closed due to the call queue parameters. Calls are routed to the Overflow destination until the queue reopens. The Overflow destination is a pre-determined telephone number that can route to an answering service, voice mail, etc.
PERSONAL IDENTIFICATION NUMBER (PIN)
A PIN is used to identify and track agent performance from any agent position. Agent performance is monitored in real-time or via historical reporting when using an ACD MIS Remote Terminal.

PILOT AND SUPPLEMENTARY NUMBERS
Callers reach the ACD group by dialing the main department telephone number termed the pilot number. Supplementary numbers can be associated with an ACD group for different calling markets. Supplementary numbers can have different priority levels. Priority levels range from 0 for the highest priority, to 3 for the lowest. High priority ACD calls are always presented to available agents before low priority calls.

PRIORITY PROMOTION
Increases the priority level of a low priority call that is waiting in the call queue. The promotion is based on the amount of time spent in the low priority status. Priority levels are assigned to the pilot and supplementary numbers. This feature eliminates the possibility of a low priority call remaining unanswered for a long period of time when an ACD group is receiving many high priority calls. The supervisor can change the time setting for priority promotion when equipped with an ACD MIS Remote Terminal.

SUPERVISOR POSITION
The supervisor position has the capability of logging on and off the ACD group to answer ACD calls if assigned an ACD DN. ACD telephone features that monitor agent and group performance can also be assigned to the supervisor position.

TIME DELAY OVERFLOW (TDO)
Helps expedite calls waiting by queuing calls in two ACD groups at one time. The feature may apply to all queued calls or only priority 0 calls. An ACD call can Time Delay Overflow to only one ACD group.

A timer is started for each call that enters the physical call queue of an ACD group. When a call exceeds the TDO threshold time, it is simultaneously queued in two ACD groups within the same application. The call now waits in the original ACD group’s Physical Queue and in the Logical Queue of the destination group. The call remains waiting (queued) in both groups for the first available agent of either group.

If the Logical Queue is full (no queue slots available), the call will remain in the original group’s Physical Queue and will not Time Delay Overflow. If the destination group is in Night Service, the call will not overflow by way of TDO.

TIME DELAY THRESHOLD ROUTE (TDTR)
Works in conjunction with Time Delay Overflow (TDO). It monitors the duration of time a call is in the TDO condition to prevent calls from waiting too long.

The TDTR timer is started when a call enters the Time Delay Overflow condition. When the call exceeds the threshold time, the call is rerouted to the Time Delay Threshold Route. The Time Delay Threshold Route is a pre-determined telephone number that can route to an answering service, voice mail, etc.

TRANSFER RECALL
Allows a transferred call, that is waiting in the Call Transfer Queue, to return to the agent that originated the transfer to prevent the call from waiting too long.

A recall timer is started for each call that enters the Call Transfer Queue. When a call exceeds the threshold time, the call is rerouted to the originating agent position. If the agent position is busy or in a Not Ready state, the call is routed to the front of the Physical Queue and waits for the next available agent.

VARIABLE WRAP UP
Provides additional call distribution time to allow the agent to perform “wrap up” duties between calls. Wrap up time is allocated for a fixed interval.
ACD Group Log On/Off

An agent or supervisor position must be logged on to open the group. Before following the log on steps, the MAKE BUSY indicator must be on. If the indicator is flashing or off, press the key until it is on (solid), then proceed with the steps.

Agents should log off the ACD group when not available to answer calls for an extended period of time or at the end of a shift. The agent position should not be left unattended without logging off of the ACD group.

LOG ON
1. Verify MAKE BUSY indicator is on
2. Press ACD DN or INCALLS; indicator is on
3. Enter four-digit PIN or position access code; Make Busy indicator is off and Not Ready indicator is on
4. Press NOT READY to receive ACD calls; indicator is off

LOG OFF
Press MAKE BUSY; indicator is on

Answer Calls

ACD CALLS
ACD calls are presented on the ACD DN or INCALLS, which is the bottom right key of the ACD Electronic Business Set. The method in which calls are presented and answered is based on the ACD programming, such as call forcing, and if using a headset. Refer to the CTS EBS User Guide for information on keys, indicators, and call answering instructions and your ACD Application Design sheet for information on your group parameters.

NON-ACD CALLS
When you are logged off of the ACD group and MAKE BUSY is on, non-ACD numbers appear busy to incoming calls. Non-ACD numbers are your intercom line or private secondary numbers. If VoiceNet service is assigned, callers will not be routed to your mailbox service when logged off. Instead, callers hear a busy signal. These aspects of the Make Busy feature can be suspended to receive and answer non-ACD calls or to route calls to VoiceNet while logged off of the ACD group.

ALLOW NON-ACD CALLS - LOGGED OFF
Press MAKE BUSY until the indicator flashes
Agent Telephone Features

Not Ready

Allows you to hold ACD calls in the call queue while performing wrap up duties. When the Not Ready feature is activated, you remain logged on to the group but ACD calls are suspended. Non-ACD calls can be received while in Not Ready.

Closed Key Walkaway (CKW) codes can be used to describe the reason why Not Ready was used. The supervisor/manager establishes the codes if applied.

**ACTIVATE**
1. Press **NOT READY**; indicator is on or flashes
2. If using CKW codes, enter three-digit code while indicator flashes; indicator is on

**DEACTIVATE**
Press **NOT READY**; indicator is off

Display Queue Threshold (DQT)

Displays call queue activity information for 12 seconds using three threshold ranges (T1, T2, and T3) and a single indicator field. The threshold ranges are predetermined to display either the amount of calls waiting in the queue or how long the first call in the queue has been waiting. The single indicator field displays either the total number of calls waiting (CALLQ) or the total wait time in seconds for the first call in queue (WAIT).

To view call queue activity information refer to the ACD Application Design sheet for threshold settings and ranges for your service.

**ACTIVATE**
Press **QUE THRESHLD**; view call queue activity information

Line of Business (LOB)

Codes entered by agents during ACD calls to define the type of calls received for historical reporting. One to three LOB codes may be recorded per ACD call. The supervisor/manager establishes the codes if applicable.

**ENTER CODE**
1. Press **LINE OF BUS** during ACD call; indicator flashes
2. Enter three-digit LOB code; indicator is off
3. Press **LINE OF BUS** again to re-enter code if mistake was made
4. Repeat steps 1 and 2 to record additional codes
Supervisor Telephone Features

Agent Status

Provides up to the minute status on an agent’s activity by viewing the key indicator. Agent Status can be used in conjunction with OBSV AGENT to monitor an agent’s call. It can also be used with FORCE AGENT AVAILABILITY to remove the agent from a Not Ready state. One status key is assigned for each agent position.

**INDICATORS**
- **Off** - Make Busy activated, agent is logged off
- **On** - Busy, active on an ACD or Secondary Directory Number (SDN) call
- **Blinking** - Available, able to receive ACD calls
- **Flashing** - Not Ready activated

Answer Agent

Agents that are in need of assistance and wish to speak to the supervisor can press CALL SUPV, which rings the supervisor’s ANSWER AGENT.

**ANSWER CALL**
1. Press ANSWER AGENT; indicator is on and agent position display
2. Lift handset or press HANDSFREE to respond

Answer Emergency

Agents that are in need of urgent assistance due to an abusive, threatening, or critical call, press EMERGENCY, which connects to the supervisor’s ANSWER EMERGENCY. When the supervisor answers an emergency call, a three-way conference call is established with the supervisor, agent, and the agent’s caller. An incoming emergency call will ring steadily for up to 30 seconds to identify the type of call being received.

**ANSWER CALL**
1. Press ANSWER EMERGENCY; indicator is on
2. Lift handset or press HANDSFREE to respond

Call Agent

Provides a direct connection with an agent position. The agent does not have to be logged on to the ACD group. Call Agent can also establish a three-way call while observing an agent when using OBSV AGENT.

**PLACE CALL**
1. Press CALL AGENT; indicator is on
2. Lift handset or press HANDSFREE
3. Press AGENT STATUS for agent you wish to call
   - or-
   Enter agent’s call supervisor (221) number

Controlled Interflow

Allows the supervisor to reroute all new incoming ACD group calls to a pre-determined telephone number. When activated, calls that were already waiting in the call queue continue to wait for the next available agent.

**ACTIVATE**
- Press CONTROLLED INTERFLOW; indicator is on

**DEACTIVATE**
- Press CONTROLLED INTERFLOW; indicator is off

Display Agent Activity Summary (DASK)

Displays information on agent activity for 12 seconds. To view information, press AGENT SUM.

**INDICATORS**
- **ACD** - number of agents active on ACD calls
- **SDN** - number of agents that are active on non-ACD calls
- **IDL** - number of agents available to receive ACD calls
- **NR** - number of agents in Not Ready
- **NMD** - number of agents logged off in Make Busy
Supervisor Telephone Features

Display Queue Status (DQS)
Displays information on the ACD call queue activity for 12 seconds. To view information, press QUE STATUS.

INDICATORS
- CALLS/INC - number of calls waiting in physical call queue
- LOG* - number of calls waiting in logical call queue
- AGT - number of agents logged on to group
- WAIT - number of seconds the first call in queue has been waiting

* Will not display if logical queuing is not applicable

Forced Agent Availability
Allows the supervisor to force an agent out of the Not Ready state and make the agent available to accept ACD calls. The supervisor position does not need to be logged on to the ACD group to use this feature. Forced Agent Availability cannot be used to force an agent position out of Make Busy.

MAKE AVAILABLE
1. Press FORCED AGENT listen for dial tone, indicator is on
2. Press AGENT STATUS for the agent you wish to make available
   -or-
   Enter five-digit agent position number (last five-digits of ACD DN)
3. Verify agent is available by viewing FAA Confirmed in telephone display

Night Service Key
Routes new ACD calls to the Night Service destination. When activated, logged on agents can answer queued calls waiting. To deactivate Night Service, the Night Service indicator must be off and an agent must be logged on the group.

ACTIVATE
- Press NIGHT SRVC; indicator is on

DEACTIVATE
- Press NIGHT SRVC; indicator is off

Observe Agent
This feature is used to monitor agent calls. Depending on the application programming, the agent will or will not receive a monitoring warning tone. Refer to the ACD Application Design sheet to identify whether a monitoring tone applies.

If you have AGENT STATUS, the ACD directory number and secondary directory number of the agent position can be monitored simultaneously. While monitoring an agent, you can also use CALL AGENT to establish a three-way call with the agent and ACD caller.

MONITOR CALLS
1. Press OBSV AGENT; indicator is on
2. Press AGENT STATUS to monitor ACD and secondary calls
   -or-
   Enter five-digit agent position number to monitor ACD calls
3. Listen for agent conversation
4. Press RLS to end monitoring
   -or-
   Press CALL AGENT to join agent call
Recorded Announcements

Call Queue Announcements

Recorded announcements play for ACD calls that are waiting in the call queue for the next available agent. There are two types of call queue announcements: Primary and Delayed.

- **Primary Announcement** - plays as soon as the call is answered by the physical call queue. It is a customized recording that is managed by the department to identify the place of business.

- **Delayed Announcement** - one or more delayed announcements can be assigned to play periodically, to thank the caller for continuing to wait. Delayed announcements can either be customized and managed by the department or a generic system greeting.

Each customer application has a system access number assigned and a customized access code. A recorded announcement also contains an announcement message number, announcement duration, and delayed announcement intervals. This information is needed to record an announcement. Refer to the ACD Application Design sheet to identify your department’s programming information.

**RECORD ANNOUNCEMENT**

1. Dial **System Access Number** ____________; listen for system prompt to enter access code
2. Enter **System Access Code** _____________, then press #; listen for system prompt to enter command
3. Press 7 # to record announcement message
4. Enter **announcement message number** _____, then press #; listen for tone
5. Record announcement
6. Press # to stop recording; listen for system prompt indicating message was recorded
7. Press 8 # to review announcement message
8. Enter announcement **message number** _____, then press #; listen to recording
9. Repeat steps 3 through 6 to rerecord announcement message
10. Press 0 # to exit system

**REVIEW ANNOUNCEMENT ONLY**

1. Dial **System Access Number** ____________; listen for system prompt to enter access code
2. Enter **System Access Code** _____________, then press #; listen for system prompt to enter command
3. Press 8 # to review announcement
4. Press announcement **message number**, then press #; listen to recording
5. Press 0 # to exit system
Forced Announcements

There are three types of forced announcements: Forced Incoming Announcement, Forced Overflow Announcement, and the Forced Night Service Announcement.

- **Forced Incoming Announcement** - plays for all ACD calls when the group is open, regardless if the call is being routed to an available agent or to the call queue. It will not play if the ACD group is in Night Service.

- **Forced Overflow Announcement** - plays for ACD calls that are deflected to the Overflow destination.

- **Forced Night Service Announcement** - plays for ACD calls routed to Night Service. All forced announcements play prior to any other destination announcement.

Refer to the ACD Application Design sheet to identify if any of these announcements apply to your application and to obtain the department’s programming information. This information is needed to record a customized announcement.

**RECORD ANNOUNCEMENT**

1. Dial **System Access Number ____________**: listen for system prompt to enter access code
2. Enter **System Access Code ____________**, then press #: listen for system prompt to enter command
3. Press 7 # to record announcement message
4. Enter **announcement message number ____**, then press #: listen for tone
5. Record announcement
6. Press # to stop recording; listen for system prompt indicating message was recorded
7. Press 8 # to review announcement message
8. Enter announcement **message number ____**, then press #: listen to recording
9. Repeat steps 3 through 6 to rerecord announcement message
10. Press 0 # to exit system
View Messages

ACD agents can access the Stat-VU Display Screen to view external display messages sent by the call center supervisor/manager from the ACD MIS. The Stat-VU Display Screen does not provide global settings. Each agent must open the Stat-VU software on his/her own computer to set personal configuration settings and to view messages.

The Stat-VU program screen is displayed when launching the Stat-VU software before the Display Screen is opened. The Stat-VU program screen must remain open to receive messages. If no connection is made with the CTS ACD MIS Host when the Display Screen is launched, an error message will appear. If this happens, close the Stat-VU program and notify your supervisor of the error.

OPEN STAT-VU DISPLAY SCREEN
1. Click on Start menu
2. Select Programs, then click on Stat-VU; Stat-VU program screen is displayed then automatically minimizes
3. Wait for Stat-VU Display Screen to open; connection is made to CTS ACD MIS Host, then messages are presented

Configure Display Screen

Stat-VU includes a Display Configuration dialog box for setting display parameters on the individual agent screen. The Display Configuration window can be accessed from any Stat-VU display window. Each agent can customize the Window Options or Font Settings for the Stat-VU Display Screen.

WINDOWS OPTIONS
Window Options allow the agent to customize how the Stat-VU Display Screen is viewed on the computer.

- Scroll - when selected, a scroll bar appears along the right edge of the Stat-VU window. When the window becomes full of messages, you are able to scroll up or down the window to see messages that may be out of view. Stat-VU stores the last 200 messages for display. Subsequent messages overwrite the oldest message available for display. If you scroll upward to view messages, you will be bumped to the bottom of the message window when the most current message is displayed.
- Fixed - when selected, the Stat-VU window will not have a scroll bar to the right of the window. When the window is full, the next message overwrites the most frequent message on the top of the window. Successive messages sequentially overwrite the next message. The height of the window determines the total number of messages to be displayed at any time.
- Always on Top - when selected, the Stat-VU Display Screen will constantly be visible on top of any other open window, when multiple applications are in-use. This option can be selected with the Pop up on Receive option.
- Pop up on Receive - when selected, the Stat-VU Display Screen will open automatically (maximize) as soon as a new External Display message is received. This option can be selected with the Always on Top option.

CHANGE WINDOW OPTIONS
1. Click on Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens.
2. Select desired option by clicking on adjacent radio button or check box under Window Options.
3. Click OK to save changes.
Font Settings

Font Settings allow you to customize the font type, font color, and window background color of the Stat-VU Display Screen. The call center supervisor/manager can choose from three colors (red, yellow, or green) when creating a message within the ACD MIS remote terminal. Each receiving agent can then modify those colors, the font, and the background color of the message window. For example, the agent can change “yellow” font that is sent from the ACD MIS remote terminal to appear as purple on his/her screen.

CHANGE FONT TYPE AND COLOR
1. Click Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens
2. Click Change Font for desired color (Red, Yellow, or Green); Font Screen window appears
3. Select Font, Font style, Size, and/or Color
4. Click OK to make selection
5. Repeat step 2 and 3 for any additional colors
   -or-
   Click OK to save changes and close window

CHANGE BACKGROUND COLOR
1. Click Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens
2. Click Background Color for desired color (Red, Yellow, or Green); Color window appears
3. Select color from color chart or define custom color
4. Click OK to make selection
5. Repeat step 2 and 3 for any additional colors
   -or-
   Click OK to save changes and close window

RESTORE TO DEFAULT
1. Click Stat-VU Menu, then select Display Configuration; Display Configuration dialog box opens
2. Click Restore Defaults
3. Click OK to make selection