Avaya one-X® Agent quick reference

Release: 2.5
March 12, 2011

Contents

Chapter 1: Call handling

This reference guide addresses the most common procedures for taking calls. Your contact center may be configured to use different procedures.

Answering calls

1. To answer a call:

    • If Auto-Answer is in effect, wait for the confirmation tone.

    • If Auto-Answer or Auto Accept option are not in effect, click **Call Answer** icon in the voice interaction to answer/accept the call manually.

2. If an agent greeting is in use, wait for it to finish playing.

3. Speak into the headset, microphone, or handset.

Making calls

1. To dial from text entry field:

    a. On the action bar, click **Work Options** list menu > **New Call**

    b. In the **Text Input** field, enter the contact phone number, valid telephone number, agent number or extension number.

    c. Click **Initiate Call** next to **Text Input** field to initiate a new call.

2. To call a number from the contact list:

    a. On the action bar, click **Contact List** icon

    b. Scroll to the contact you want to call and click **Click to Call** phone icon to initiate a new call.

3. To make a call from Contact Log:

  a. On the action bar, click **Work Log**

  b. Scroll to the contact log record you want to call and click **Click to Call** phone icon to initiate a new call.

Holding and reconnecting

Select the appropriate choice depending on what you want to perform:

• To place a call on hold, click **Hold Call** icon. Note that if auto-hold is in effect, the system puts current calls on hold automatically when you answer another call.

• To return to a call on hold, click **Unhold Call** icon.

Muting and unmuting your workstation

On an active call or during conference, perform one of the following actions:

• To mute a call, on the top bar, click **Mute Phone** icon.

• To disengage mute, on the top bar, click **Unmute Phone** icon.

Transferring calls

1. During an active call, perform one of the following options:

   • Click **Call Transfer** > **Supervisor** to transfer the call to the supervisor.

   • Click **Call Transfer** > **Speed Dial** > <Contact Name> to transfer the call to a contact in the Speed Dial list.

- Click **Call Transfer** > **Contacts** and select a contact from the contact list window to transfer the call to a contact in the list.

- Click **Call Transfer** > **Enter value** > enter phone number in the text entry field to transfer the call to an agent.

If **Direct Transfer** is in effect, the system transfers the call to the selected contact directly. The transfer ends.

2. If **Consultive Transfer** is in effect, wait for the third party to answer the call and announce the call transfer.

3. If the third party agrees to accept the impending call, click **Call Answer**. The system transfers the call to the selected contact.

Conferencing callers

1. During an active call, perform one of the following options:

   - Click **Conference** icon > **Supervisor** to conference the call with the supervisor.

   - Click **Conference** icon > **Speed Dial** > <Contact Name> to conference the call with a contact listed in the SpeedDial list.

   - Click **Conference** icon > **Contact List** and select a contact from the Contact List window to add the contact to the conference.

   - Click **Conference** icon > **Text entry field** and enter the telephone or an extension number in the **Text Input** field to conference the call.

   - If two or more calls are in progress, drag and drop one call into the other to conference the callers.

   If **Direct Conference** is in effect, the system adds the contact to the conference directly.

   If **Consultive Conference** is in effect, wait for the third party to answer the call and announce the conference. The system puts the first party's call on hold, and dials and creates a new call in the work item. If the third party agrees, agent must click **Call Forward** icon.

2. To end the conference call, perform any of the following steps:

   - To drop the last added participant from the conference call, click **Drop Participant** for the associated participant.

   - To close the conference call, click **End Conference** icon in the work item.

Initiating video calls

1. During an active call, click **Video Call** icon to start a video call.

   The system automatically converts the a call I into a video call if the station is a video enabled station.

2. Use any of the following options during the video call:

   - Click **Mute Video** icon to block your video broadcast.
   - Click **Unmute Video** icon to unblock your video broadcast.
   - Click **Acquire remote camera** icon to acquire the remote camera.
   - Click **Call End** icon to release the remote camera.

Playing an agent greeting manually

1. When system recognizes an incoming call, click **Call Answer** icon.

2. On the top bar, click **Agent Greetings** icon and select the agent greetings recording for the incoming call.

   The system starts the agent greeting first and then transfers the voice control to you. You can click **Bypass Agent Greetings** icon if you want to bypass or stop the greeting playback.

Ending a call

To end a call, perform one of the following actions:

   - Click **Call End** icon in the voice interaction.
   - Hang up the handset, if used.

Note: For calls on hold, you must reconnect to the call before you can end it.

Sending instant messages

1. To send instant messages using **Text Input** field:

   a. Click **Work Options** list next to the text entry field and click **New IM** Icon.

   b. Type the recipient's IM user ID and domain in the following manner in the **Text Input** field:
   <IM user ID>@<Domain name>

   c. Press `Enter` or click the **Initiate IM** icon.

2. To send instant messages to a contact from your contact list, click **Initiate IM** icon corresponding to the contact name in the Contact List window.

3. To send instant messages to a contact from your work log, expand the work log entry and click **Initiate IM** icon corresponding to the work log entry in the Work Log window.

4. To start IM interaction on a voice call, click **Add IM to workitem** icon of the relevant work item on the Work List window.

5. Type your messages in the IM window and click **Send** or press `Enter`.

Ending an IM interaction

Click the **End IM** icon of the corresponding IM interaction either on the IM window or on the Work List window.

Answering a TTY call

1. On the incoming call work item, click the corresponding **Start TTY** icon.

TTY call gets accepted and focus shifts to the TTY window.

2. Begin typing your messages at the green prompt on the TTY window. Make sure that you end your message string with the abbreviation GA (meaning Go Ahead).

Ending a TTY call

To end a TTY call, click the **End TTY** icon corresponding to the TTY interaction on the TTY window, or on the Work List window.

Chapter 2: Common tasks and help

Registering with Communication Manager

1. Click **Start Avaya one-X Agent** icon on your computer desktop.

   The Welcome window appears.

2. Click **OK**.

3. On the Login dialog box, perform the following steps:

   a. In the **Extension** field, enter the telephone extension number.

   b. In the **Password** field, enter the password.

   c. To change the settings for your extension, password, save configuration, server address, telephone extension, and IP telephone address, as needed, click **Change Settings**.

   😊 **Note:**

   If the Communication Manager feature is administered on the extension, select the **CM Auto Answer Support Required** option for the application to login with **Auto Answer** option enabled.

Logging in as an agent

1. On the top bar, click **Agent Status** > **Log In**. Agent Login window is displayed after the station login is successful.

2. Enter Agent ID and password on the Agent Login window to login as Agent.

Note: If you have a voice phone, it rings. Answer the call immediately. If you do not answer the call or if you used a wrong number, log in again. Begin answering or making calls.

3. Click **Log In**.

Logging out as an agent

On the top bar, click **Agent Status** > **Logout** and choose appropriate reason code from the list (if configured).

Note: If you attempt to log out while on an active call, the system logs you out from the ACD service only after you hang up the call. You can log back in at any time by clicking the agent login.

Connecting to Presence Services

To be able to log in using this procedure, Presence Server IP Address and domain must be already configured in the **IM** tab or else the log in will fail.

1. Select **System Options** > **Presence Server Connect**.

2. On the Connect to IM Server window, perform the following steps:

   a. In the **User Name** field, enter your Presence Services user name.

   b. Enter your Presence Services password in the **Password** field.

   c. Enter the Presence Services domain name in the **Domain** field.

3. Click **Log in**.

Disconnecting Presence Services

Select **System Options** > **Presence Server Disconnect**.

Changing the agent state

On the top bar, perform one of the following actions:

- If you are ready for ACD calls, click **Agent Status** > **Ready**.
- If you are not ready for ACD calls, click **Agent Status** > **Auxiliary** and choose the appropriate reason code from the list.
- If you want to logout from the ACD, click **Agent Status** > **Log Out**.

Changing the answer settings

Use any of the following options:

- To change the answer setting to Manual-Accept, in the Work List window, click **Work List** > **Manual-Accept**.
- To change the answer setting to Auto-Accept, in the Work List window, click **Work List** > **Auto-Accept**.

😊 **Note:**

Before changing the answer setting to Auto-Accept, ensure that you are using a headset in the My computer configuration, or your phone is in the off-hook state in the Desk Phone or Another Telephone configuration.

Completing the work in follow-up work mode

1. On an active call, in the Work List window, click **Change Work Completion** > **Follow-up** icon.

2. Wait for the caller to hang the phone.

   The system starts the follow-up timer for the associated work item.

3. Complete the work for the associated work item.

4. If you finish the task before the timer expires, click **Complete Follow-up** icon . If you require more time to complete the work, click **Follow-up** > **Extend Follow-up** icon. After completing the work, click **Complete Follow-up**.

   Note: Follow-up is equivalent to After call work.

Accessing your voice mails

1. When a new voice message arrives, the system changes the message-waiting lamp to green with a mail icon appearing on the top left-hand corner of the top bar.

2. Click **Unread Messages** icon.

   Note: Voice mail service is available only for registered extensions registered with a voice mail system.

Getting help

Perform any of the following actions to access help:

• Move the mouse pointer over the icons and other interface elements to display tooltips.

• Press F1 or click **System Options** > **Help** to display the Avaya one-X Agent online help.

• On any dialog box, click the **Help** icon.

See *Using Avaya one-X Agent* for procedures and detailed information.

Chapter 3: Supervisor features

Observing agent service

Prerequisites

You can observe only those agents listed in your contact list.

1. Click the **Contact List** icon to open the Contact List window.
2. Click the **Service Observing** icon against the agent name. This displays the **Service Observe** menu.
3. Click **Observe Agent** on the Service Observe menu. This loads a Service Observing work item on your Work List window.

Sending a quick alert

1. On the action bar, click **Contact List** icon. This displays the Contacts window.
2. Perform any of the following steps to send a quick alert.
   - To send a quick alert to a group, click the **Quick Alert** icon in front of the group name in your contact list.
   - To send a quick alert to an agent, click the **Quick Alert** icon in front of the agent name in your contact list.
   - If you are service observing an agent, click the **Quick Alert** icon in the work item you are observing.
3. Enter the quick alert text on the Quick Alert window and click **Send**.

Barging into a call

1. Start service observing for the agent you want to observe.

2. Click the **Barge In** icon to enter the active call. You can talk to the agent and the customer on the active call.

Performing an ad hoc transfer

Prerequisites

To perform an ad hoc transfer, you must be involved in an assist mode in an active call between an agent and a customer.

Use the following procedure to transfer an active call to the supervisor desktop. After the agent drops the call, the call appears as a normal work item on the supervisor's Avaya one-X Agent application interface. Thus, the system displays the call as a normal call work item.
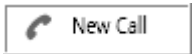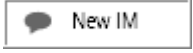
1. During an agent-customer interaction, click **Barge In** on a Service Observing session.

2. Inform the agent to click the **Call End** button.
   The call between the agent and the customer on the agent's interface ends, and the system transfers the call to the Supervisor's Avaya one-X Agent application interface as a normal work item. The system displays the call as a normal call work item.

Chapter 4: Reference tables

Media icon descriptions

Icon	Name
	Start Avaya one-X Agent
	No Messages
	Unread Messages
	Agent Greetings
	Stop Agent Greetings **Bypass Agent Greetings**
	Mute Phone
	Unmute Phone
	Audio Monitor
	System Options
	Help icon
	Manual-Accept
	Auto-Accept
	Alerting
	Working
	Follow-up
	Complete Follow-up
	Extend Follow-up
	Add New Call

Icon	Name
	Conference
	Add IM to workitem
	Work Code
	WorkItem Details
	Incoming Call
	Outgoing Call
	Call Hold **Hold Call**
	Video Call Interaction
	Conference Call
	IM request
	TTY Call
	Accept Desktop Share
	Call Answer **Unhold Call** **Call Forward**
	Call Hold
	Call Transfer
	End Call
	Start Video Call **Unmute Video**
	Acquire remote camera
	Mute Video
	End Video
	Initiate IM
	End IM
	Start TTY

Icon	Name
	End TTY
	Listen In
	Barge In
	Service Observing
	Quick Alert
	Coach
	New Work menu **Work Options** list
New Call	**New Call**
New IM	**New IM**
	Search
	Initiate Call **Click to Call**
	Conference
	Initiate IM
	Transfer
	Contact List
	Dial Pad
	Work Log
	VuStats
	Launch External Applications

Shortcut keys for Avaya one-X Agent

Use these shortcut keys as directed at appropriate location on the Avaya one-X Agent UI.

Shortcut keys to be used on	Shortcut key	Description
Action Bar	Alt+L	Toggles Contact List window
	Ctrl+D	Toggles Dialpad window
	Alt+W	Toggles Work Log window
	Ctrl+S	Toggles Vu Stats window
	Alt+A	Opens the **Launch Application** menu
	Alt+C	Initiates a new call
	Alt+I	Initiates a new IM interaction
	Alt+S	Invokes search window.
Top Bar	Ctrl+M	Opens voice mail
	Alt+G	Opens agent menu (For example, Ready, Auxiliary, Idle)
	Ctrl+Insert	Opens Agent Login dialog box
	Ctrl+Del	Logs out the agent (only applicable with no custom logout reason codes)
	Ctrl+Y	Changes agent state to Ready
	Ctrl+X	Changes agent state to Aux. (only applicable with no custom Aux. reason codes)
	Alt+P	Opens plays agent greeting menu
	Ctrl+U	Toggles between mute and unmute
	Ctrl+O	Opens the **Audio** panel
	Alt+N	Invokes the **System Options** menu

Shortcut keys to be used on	Shortcut key	Description
	`Ctrl+P`	Opens Agent Preferences window
	`Ctrl+T`	Opens System Settings window
	`Ctrl+Shift+S`	Toggles between station connect and disconnect
	`Ctrl+Shift+P`	Toggles between Presence server connect and disconnect
Contact List window	`Ctrl+Shift+C`	Invokes the Advanced Search window for the contact list
	`Ctrl+Shift+A`	Invokes the Contact Details window to add a new contact
	`Insert`	Invokes the Contact Details window to edit the contact
	`Delete`	Deletes the selected contact from the contact list
Work Log window	`Ctrl+Shift+W`	Invokes the Advanced Search window for work log
	`Delete` (while a work log is selected)	Deletes a work log
	`Page up`	Displays the previous page
	`Page down`	Displays the subsequent page
Work List window	`Alt+1` through `9`	Shifts focus between work items if you have multiple active calls in the Work List window
	`A`	Answers the call (while the focus is on voice interaction)

Shortcut keys to be used on	Shortcut key	Description
	R	Releases the call (while the focus is on voice interaction)
	H	Holds/Unholds the call (while the focus is on voice interaction)
	T (open menu)	Transfers the call (while the focus is on voice interaction)
	C (open parent WI menu)	Conferences the call (while the focus is on voice interaction)
	I	Opens IM window (while the focus is on IM interaction)
	Y	Opens the TTY window (while the focus is on voice interaction)
	A	Adds a call to the work item (while the focus is on the work item)
	I	Adds IM interaction to the work item (while the focus is on the work item)
	R	Invokes Reason Codes (while the focus is on the work item)
	D	Displays the work item details (while the focus is on the work item)
While in IM interaction	I	Invokes the IM window.
	R	Invokes the Reason Codes window.
	D	Displays the Work Item details on the Work List window.
Dialpad window	Ctrl+F	Displays the Favorite Buttons window.

Shortcut keys to be used on	Shortcut key	Description
IM Window	Alt+R	Invokes the saved responses on the IM window
All list windows	Alt+F6, Shift+Alt +F6	Alternates between two consecutive pages of the window on which they are used.
TTY Window	Ctrl+Shift+Y	Closes the TTY window
	Ctrl+Shift+H	Toggles between Hold and Unhold states of the TTY call
	Ctrl+Shift+T	Opens menu to transfer the call
	Ctrl+Shift+R	Releases the call
	Alt+Shift+A	Opens the **Abbreviation** menu
	Alt+Shift+O	Opens the **Options** menu of the TTY window