Using the Avaya IP Office Contact Center Chrome and Web Interfaces

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Security Vulnerabilities

Information about Avaya's security support policies can be found in the Security Policies and Support section of https://support.avaya.com/security.

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Contents

Chapter 1: Introduction

Purpose

This document provides contextual information and step-by-step procedures on using Agent and Supervisor functionality in the IP Office Contact Center User Interface for Chrome Devices and the IP Office Contact Center Web User Interface. The functionality available on both interfaces is almost the same. The key difference is the devices and operating systems that each interface supports.

Administration functionality is not available on these interfaces. You can perform administration tasks using the IP Office Contact Center User Interface for Windows.

Intended audience

This document is intended for people who want to learn how to use the IP Office Contact Center User Interface for Chrome Devices and IP Office Contact Center Web User Interface.

Related resources

Documentation

See the following related documents at the Avaya Support website at http://support.avaya.com.

Note:

Some documents are restricted and might not be available to all users.

Document title	Use this document to:	Audience
Overview		
Avaya IP Office Contact Center Feature Description	Understand IP Office Contact Center features and capabilities.	All users

Table continues…

Document title	Use this document to:	Audience
Avaya IP Office Contact Center Documentation Catalog	Understand the structure of IP Office Contact Center documentation, and determine which document you should reference to obtain information on a specific subject.	All users
Planning		
Avaya IP Office Contact Center Reference Configuration	Understand IP Office Contact Center deployment topologies, network architecture, system capacities, product interoperability, and functional limitations of specific configurations.	• Sales and support personnel • Architects • Implementation engineers
Deploying		
Avaya IP Office Contact Center Installation Task Based Guide	Install IP Office Contact Center software.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Dialer Task Based Guide	Configure IP Office Contact Center dialer functionality.	• Support personnel • Implementation engineers
Administering		
Administering Avaya IP Office Contact Center Configuration Module	Perform administration tasks on the Configuration module. With the Configuration module, you can update information for agents, teams, announcements, voice units, customers, destinations, and devices in the IP Office Contact Center interface. You can also assign privileges to agents and agent groups. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Dialer	Administer and use the Dialer module in the IP Office Contact Center interface. **Note:** This document is also available as a help system through the product interface.	Administrators

Related links

Finding documents on the Avaya Support website on page 9

Finding documents on the Avaya Support website

About this task

Use this procedure to find product documentation on the Avaya Support website.

Procedure

1. Use a browser to navigate to the Avaya Support website at http://support.avaya.com/.
2. At the top of the screen, enter your username and password and click **Login**.
3. Put your cursor over **Support by Product**.
4. Click **Documents**.
5. In the **Enter your Product Here** search box, type the product name and then select the product from the drop-down list.
6. If there is more than one release, select the appropriate release number from the **Choose Release** drop-down list.
7. Use the **Content Type** filter on the left to select the type of document you are looking for, or click **Select All** to see a list of all available documents.

   For example, if you are looking for user guides, select **User Guides** in the **Content Type** filter. Only documents in the selected category will appear in the list of documents.
8. Click **Enter**.

Related links

Documentation on page 7

Training

You can access training courses and credentials at http://www.avaya-learning.com. To search for a course, after logging in to the website, enter the course code or the course title in the **Search** field and press **Enter** or click **>**.

Table 1: IP Office Contact Center courses and certification credentials

Course code	Course title
ACSS-3003	ACSS — IP Office Contact Center credential
AIPS-4000	AIPS — IP Office Platform credential
ACSS-3000	ACSS — Avaya Midmarket Communications credential
4001	Avaya IP Office Platform Implementation Test
3002	Avaya IP Office Platform Configuration and Maintenance Exam
3003	Avaya IP Office Contact Center Implementation and Maintenance Exam
8S00010E	Knowledge Access: Avaya IP Office Contact Center Implementation and Support.

Table continues…

Course code	Course title
0S00100E	Knowledge Access: Avaya IP Office Contact Center Administration
0S00010E	Knowledge Collection Access: Avaya Midmarket Implementation and Support
8S00010I	Fast Track: Avaya IP Office Contact Center Implementation and Support Instructor Led
8S00010V	Fast Track: Avaya IP Office Contact Center Implementation and Support Virtual Instructor Led
10S00005E	Knowledge Access: Avaya IP Office Contact Center Platform Implementation
5S00004E	Knowledge Access: Avaya IP Office Contact Center Platform Support
2251E	Knowledge Access: Avaya IP Office Contact Center Platform Administration
2252C	Avaya IP Office Contact Center Expanded Configuration and Administration

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

Procedure

- To find videos on the Avaya Support website, go to http://support.avaya.com and perform one of the following actions:
  - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.
  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and perform one of the following actions:
  - Enter a key word or key words in the **Search Channel** to search for a specific product or topic.
  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

Note:

Videos are not available for all products.

Support

Go to the Avaya Support website at http://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Chapter 2: Getting started

With the IP Office Contact Center User Interface for Chrome Devices and the IP Office Contact Center Web User Interface, you can access and use IP Office Contact Center Agent and Supervisor functionality. You can define users and change user privileges with IP Office Contact Center User Interface for Windows.

The following table summarizes Agent and Supervisor functionality. Depending on your privileges, some functionality might be unavailable.

Agent functionality	Supervisor functionality
• Access a Home screen to view statistics and log in to your agent groups. As an agent, you cannot send messages from the Home screen. Telephony statistics include the service factor, the number of abandoned calls, and the number of calls in the queue. • View supervisor messages and other agent statistics. Agent statistics display the number of logged in agents and the work state of each agent. You can also view the number of logged in supervisors. • Access telephony functionality. You can use the Telephony screen to make and receive audio calls. You can also access call control, consultative transfer, unsupervised blind transfer, and conference functionality. You can make an outbound call while you are not on a call or in the After Call Work (ACW) state. **Note:** Video calls are not currently supported. • During a call, you can write notes, view customer history, and access configured websites. You can also request supervisor assistance. • Use email and chat functionality if configured by your system administrator. If email and chat functionality are not configured, the Email and Chat tabs are not available in the UI. • Start and end breaks.	• Access a Home screen that provides similar functionality as the Home screen for agents. As a supervisor, you can also send messages to agents from the Home screen. • Access a Realtime Information screen to monitor groups, agents, and queues. You can expand these items to view details. For example, if you expand an agent group, you can see the current customer service statistics and the status of all agents in the group. You can also change the value of different variables. • View and generate historical reports from the Reporting screen. An administrator must configure the types of reports that you can generate from the UI. You can change report parameters, such as date ranges, before generating a new report. • Act as an agent to perform customer service tasks, such as answering an incoming call. • Monitor an active call silently or join the call. To join a call, you must accept the emergency assistance request from the agent. If the agent did not make an emergency assistance request, you can only monitor the call silently. • Reassign agents to a group. • Force an agent to: - Log in or log out of specific groups. - Take a break.

Requirements and specifications

IP Office Contact Center User Interface for Chrome Devices requirements

The IP Office Contact Center User Interface for Chrome Devices:

- Supports WebRTC or Avaya desk phones.
- Runs on devices with Chrome OS version 37 or later.

Minimum requirements

Memory	4 GB
Storage	16 GB
Screen resolution	1366 x 768 pixels or higher

IP Office Contact Center Web User Interface requirements

The IP Office Contact Center Web User Interface is similar to the IP Office Contact Center User Interface for Chrome Devices, but both interfaces have different support requirements. The IP Office Contact Center Web User Interface supports a screen resolution of 1280 x 850 pixels, but does not support adaptive sizing. The layout depends on the size of your browser window.

The IP Office Contact Center Web User Interface is supported on web browsers with a Windows or Mac OS. Each browser supports different phones and operating systems. The following table lists supported browsers and shows what the IP Office Contact Center Web User Interface supports with each browser. For more information about interoperability, see https://secureservices.avaya.com/compatibility-matrix/menus/product.xhtml?name=IP+Office+Contact+Center.

Important:

Use the latest browser versions, and make sure your browser is updated to the latest available patch.

Web browser	Windows support	Mac support	WebRTC support	Desk phone support	Avaya Communicator for Windows soft phone support
Internet Explorer	• Windows 7 • Windows 8.1	Not supported.	No	Yes	Yes
Google Chrome	• Windows 7	Mac OS X10.10	Yes	Yes	Yes

Table continues…

Web browser	Windows support	Mac support	WebRTC support	Desk phone support	Avaya Communicator for Windows soft phone support
	• Windows 8.1				
Mozilla Firefox	• Windows 7 • Windows 8.1	Mac OS X10.10	No	Yes	Yes
Safari	Not supported.	Mac OS X10.10	No	Yes	No

Certificate configuration

To access the IP Office Contact Center User Interface for Chrome Devices and the IP Office Contact Center Web User Interface, you must configure your browser to accept IP Office Contact Center certificates.

Note:

You do not need to perform this task if your administrator has installed a genuine certificate from a trusted certificate authority (CA).

The following procedures provide guidelines for different browsers and operating systems.

- If you are using IP Office Contact Center User Interface for Chrome Devices, you must use the Chrome device instructions.
- The same Firefox instructions can be used for Windows or Mac.
- If you are using a Chrome browser, the instructions vary for Windows and Mac.

Configuring your Chrome device to accept certificates

About this task

Use this procedure if you are using the IP Office Contact Center User Interface for Chrome Devices. Before you install the required certificate, your browser displays the warning `Your connection is not private`.

Procedure

1. In Google Chrome, enter `https://xxx.xxx.xxx:28443/Administration`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.
2. With your mouse, hover over the red **X** on the padlock in the address bar.
3. Click **View site information**.

4. Click **Certificate information** and then click **Details**.
5. Click the certificate name, `ipoffice-Root`, and then **Export**.
6. In the Save file as window, do the following:
    a. Choose a location to save the certificate.
    b. Type a name for the certificate.
    c. Select **Bas64-encoded ASCII, single certificate** from the drop-down list.
    d. Click **Save**.
7. In the Chrome browser, click **Tools** > **Settings**.
8. Scroll down and click **Show advanced settings** and then **Manage certificates**.
9. Click the **Authorities** tab.
10. Click **Import** and select **All Files** .
11. Select the certificate exported earlier and click **Open**.
12. Select **Trust this certificate for identifying websites** and click **OK**.

    The device displays the Avaya certificate.
13. Click **Done** and then close all open windows and browser sessions.

Configuring certificates on Windows and Mac

Configuring Google Chrome and Internet Explorer to accept certificates on Windows

About this task

All users on the same computer must perform the following procedure to configure the browser to accept IP Office Contact Center certificates.

Procedure

1. In your browser, enter `https://xxx.xxx.xxx:28443/Administration`.

    Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.
2. In Google Chrome, do the following:
    a. Next to the address bar, click the red cross.
    b. Click **Certificate information**.
3. In Internet Explorer, do the following:
    a. In the browser window, click **Continue to this website**.
    b. Next to the address bar, click **Certificate error**.

   c. Click **View certificates**.
4. In the Certificate dialog box:
   a. Click the **Certification Path** tab.
   b. Click the first node in the tree.
   c. Click **View Certificate**.
5. In the next Certificate dialog box:
   a. Click the **Details** tab.
   b. Click **Copy to file**.
6. In the Wizard that displays:
   a. Click **Next** twice.
   b. To choose a folder, click **Browse** and enter a file name.
   c. Save your changes.
   d. Click **Next** > **Finish**.
7. When prompted to close all dialog boxes, click **OK** and exit the browser.
8. In Windows Explorer, locate the file that you saved in step 6.b on page 16, and then do the following:
   a. Right-click the file and click **Install certificate**.
   b. Click **Next**.
   c. Click **Place all certificates in the following store**.
   d. Click **Browse** > **Trusted Root Certification Authorities**.
   e. Click **OK** > **Next** > **Finish**.
   f. In the Warning dialog box, click **Yes** > **OK**.
9. **(Optional)** Delete the file that you created in step 6.b on page 16.

Result

You can now browse the IP Office Contact Center application website without certificate warnings by using:

- The host name or IP address in Google Chrome.
- The host name in Internet Explorer.

If you use the IP address, the system displays a certificate error next to the address bar.

Configuring Firefox to accept certificates on Mac and Windows

About this task

All users on the same computer must perform the following procedure to configure the browser to accept IP Office Contact Center certificates.

Procedure

1. In your browser, enter `https://xxx.xxx.xxx:28443/Administration`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. Click **I understand the risks** > **Add Exception**.
3. In the dialog box, click **View**.
4. In the next dialog box:
   a. Click the **Details** tab.
   b. To highlight the top row, in the Certificate list, click the top root node.
   c. Click **Export**.
   d. Select a folder and ensure the file has a `.crt` extension.
   e. Click **Save** > **Close**.
5. Select **Options** from the **Tools** menu or next to the toolbar.
6. Click **Certificates** > **View Certificates**.
7. From the **Authorities** tab, do the following:
   a. Click **Import**.
   b. Select the file that you created in step 4.d on page 17 and click **Open**.
8. In the dialog box, do the following:
   a. Select **Trust this CA to identify web sites**.
   b. Click **OK**, close the dialog boxes, and then exit the browser.
9. **(Optional)** Delete the file that you created in step 4.d on page 17.

Result

You should now be able to browse the IP Office Contact Center application website without certificate warnings by using the hostname or IP address.

Configuring your Mac device to accept certificates on Safari

Procedure

1. In your browser, enter `https://xxx.xxx.xxx:28443/Administration`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. Click **Show Certificate** in the Warning window.
3. Select the **Always trust** check box.
4. Click **Continue**.
5. Enter your operating system password to confirm the Certificate Trust Settings change.

Result

In the future, the browser will trust the certificate from the IP Office Contact Center server.

Configuring your Mac device to accept certificates on Chrome

Procedure

1. In Google Chrome, enter `https://xxx.xxx.xxx:28443/Administration`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.
2. With your mouse, hover over the red **X** on the padlock in the address bar.
3. Click **Certificate information** and then click **Details**.
4. Click and drag the image of the certificate to the desired location on your Mac.
5. Open Keychain Access from your Mac computer.
6. At the bottom of the screen, click +.
7. Navigate to the location of the saved certificate.
8. Select the certificate `.cer` file and click **Open**.

Adding a certificate to Keychain Access on Mac

About this task

Use this procedure if you already have the certificate `.cer` file. This procedure describes how to install your certificate in Keychain Access.

Procedure

1. Open Keychain Access from your Mac computer.
2. At the bottom of the screen, click +.
3. Navigate to the location of the saved certificate.
4. Select the certificate `.cer` file.

Result

The certificate is added to Keychain Access.

Logging in to the user interface

Before you begin

- Obtain the IP Office server address from your system administrator.
- If you plan to use WebRTC, your administrator must enable the Sync Service. Otherwise, the UI will not be able to retrieve your WebRTC settings.

Procedure

1. With the IP Office Contact Center Web User Interface, navigate to one of the following URLs in your browser:
   - `https://<Server address>:28443/WebUI`
   - `http://<Server address>:28080/WebUI`

   Important:

   - If you are using WebRTC, you must use the secure HTTPS URL listed above.
   - The secure link does not work in Safari browsers unless you install the required IP Office Contact Center certificate in your Trusted store.
   - Non-secure HTTP connections are blocked by the Cloud firewall.
2. To change the application settings, do the following on the Login screen:
   a. Click **Settings** ( ).
   b. Enter the IP address of the IP Office Contact Center server.
   c. Enter the IP Office Contact Center server port number.
   d. To use WebRTC, change the slider to green, and enter the IP address and port number of the WebRTC gateway.
   e. **(Optional)** Change the logging level.

      Warning is selected by default.
   f. Click **Save**.
3. On the Login screen, enter the following information:
   a. Your agent or supervisor user name.
   b. Your agent or supervisor password.
   c. Your telephone extension number.

   If you are using the WebRTC gateway, the **Extension** field is replaced by the following:
   - **Phone Extension**: The integrated phone extension.
   - **Phone Password**: The integrated phone password.
4. Click **Login** or press `Enter` on your keyboard.

   Note:

   If the IP Office Contact Center server and UI versions are not compatible, you cannot log in to the UI. When you try to log in, the UI will display an error message saying `Server is not compatible`. Contact your administrator for assistance.

Next steps

Sign in to your agent groups. As a supervisor, you must also sign in to the agent groups you want to monitor.

Related links

Signing in and out of agent groups on page 30

Logging out of the interface

About this task

Use this procedure to log out of the UI when your work shift ends. After you log out, you cannot receive calls until you sign in to your agent groups again.

You cannot log out while you are on an active call. The system automatically signs you out of all agent groups if you do not answer an incoming call in the required time.

Procedure

1. In the left navigation pane, click .
2. Click **Log out**.
3. Click **Close** () to exit the UI.

Chapter 3: Navigation

General interface options

The following tables display key buttons and options in the UI. You might need to click **More** ( ) to access some options.

General options

Button	Name	Description
	Settings	Enables you to configure the server settings when you log in to the UI. If you are using WebRTC, you must also include the WebRTC settings information.
	Information	Displays release information, including the version installed.

Agent and supervisor menus

Button	Name
	Home
	Telephony
	Email
	Chat
	Realtime information
	Reports

Functionality and statistics

Agent and supervisor Home screen functionality

Home screen

The following table describes the general options you can access in the Home screen.

Option	Description
Group sign in area	You can sign in to all your agent groups or select specific groups.
Messages	Agents can view messages from the supervisor. Supervisors can send messages to agents.
Statistics	You can view general statistics, such as overall service levels and the average wait time for calls. You can also view the number of logged-in agents and supervisors.

Related links

Home screen statistics for agents and supervisors on page 22

Home screen statistics for agents and supervisors

The statistics on the Home screen are the same for agents and supervisors. All values displayed on this screen are for the overall contact center and are calculated by taking the average for all topics in the contact center.

Note:

Some statistics might not match what is displayed in the IP Office Contact Center User Interface for Windows. For example, the average wait time does not coincide with the value in the IP Office Contact Center User Interface for Windows. The IP Office Contact Center User Interface for Chrome Devices and IP Office Contact Center Web User Interface show the average wait time for all topics in which telephony, email, or chat are enabled. The IP Office Contact Center User Interface for Windows shows the average time for individual topics.

The following tables describe the key telephony, email, and chat statistics on the Home screen.

Telephony statistics on the Home screen

Statistic	Description
Abandoned call monitor	The percentage of calls that were abandoned out of the total calls for each shift.
Service factor	The task service factor. This value is displayed as a percentage and indicates the overall quality of service.
Longest wait time	The longest wait time for a call in the queue. This value is calculated based on all topics in the contact center.
Average wait time	The average wait time for calls in the queue.

Table continues…

Statistic	Description
Current active calls	The number of active conversations through call distribution. **Note:** For this statistic to work, an administrator must configure a virtual agent group with the name `ChromeAppAG`. Virtual agent groups can be configured in the IP Office Contact Center User Interface for Windows.
Average active calls	The average number of active conversations through call distribution. This average is calculated based on the time range configured in the IP Office Contact Center User Interface for Windows Administration tab under **Configuration** > **System** > **Real time information default values** > **Calculating time period**. **Note:** For this statistic to work, an administrator must configure a virtual agent group with the name `ChromeAppAG`. Virtual agent groups can be configured in the IP Office Contact Center User Interface for Windows.
Answered calls	The number of conversations per shift.
Abandoned calls	The number of abandoned calls per shift.
Logged-in agents	The number of agents that are signed in to the Telephony channel.
Logged-in supervisors	The number of supervisors that are signed in to the Telephony channel.

Chat statistics on the Home screen

Statistic	Description
Service factor	The task service factor. This value is displayed as a percentage and indicates the overall quality of service.
Longest wait time	The longest wait time for an IM conversation in the queue. This value is calculated based on all topics in the contact center.
Average wait time	The average wait time for an IM conversation in the queue.
Chats waiting	The number of waiting or pending IM conversations.
Logged-in agents	The number of agents that are signed in to the Chat channel.
Logged-in supervisors	The number of supervisors that are signed in to the Chat channel.

Email statistics on the Home screen

Statistic	Description
Service factor	The task service factor. This value is displayed as a percentage and indicates the overall quality of service.

Table continues…

Statistic	Description
Longest wait time	The longest wait time for emails in the queue. This value is calculated based on all topics in the contact center.
Average wait time	The average wait time for emails in the queue.
Emails waiting	The number of waiting or pending emails.
Logged-in agents	The number of agents that are signed in to the Email channel.
Logged-in supervisors	The number of supervisors that are signed in to the Email channel.

Telephony screen functionality

The following table describes the general options you can access in the Telephony screen.

Option	Description
Call area	Displays the following: • Active calls. • Actions available for all calls. **Note:** After a customer leaves a conference call, the customer name continues to display on the UI. If customer information is unavailable, nothing displays on the UI. The area where the customer name is usually displayed remains blank.
Content area	Displays the following: • **Customer Details**: Customer history, notes about customer issues, and an option to search for information on the internet. • **Groups**: Agent group statistics and call statistics for the group. Call statistics include the list of calls in the queue and abandoned calls. You can also edit group information. **Note:** You can only reserve a call when the call is in the queue. • **Users**: A list of agents and the actions available for each agent. You can also view a complete list of names and contact numbers for the entire contact center.
Tertiary information	Displays telephony statistics, including: • Answered calls • Placed or outbound calls • Average talk time • Incoming calls per hour

Table continues…

Option	Description
	Note: The placed or outbound calls counter is increased for Direct Dialer, Campaign Dialer, and Agent Dialer calls, but not for Mechanic Dialer calls.

Related links

Telephony users on page 25
Telephony screen statistics for agents on page 25

Telephony users

In the **Telephony** > **Users** tab, you can view the following:

- **Agents**
- **Contacts**

Agents tab options

Name	Description
Agent names and extensions	You can view a list of agent names and extension numbers. You can also search for agents by name.
Agent status information	Agents work states include the following: • Signed off • Available • Do not disturb (DND) • Busy

Contacts tab options

Name	Description
Search Contacts field	Enables you to search for IP Office users by contact number.
User names and phone numbers	The UI displays a list of user names and phone number. You can also use the **Phone** button ( ) to call a user.

Related links

Agent work states on page 32
Realtime Information screen statistics for supervisors on page 27
Home screen statistics for agents and supervisors on page 22

Telephony screen statistics for agents

The statistics on the Telephony screen are customized for the agent. Each statistic is based on the agent's performance during a shift. General statistics for the whole contact center are available on the Home screen.

Statistic	Description
Answered calls	The number of conversations that the agent addressed during the shift.
Outbound dialer calls	The number of outgoing calls per shift.
Average talk time	The average conversation length per shift.
Incoming calls per hour	The average number of Automatic Call Distribution (ACD) calls per hour. This value is related to the time when the agent is signed in during the shift.

Email and chat functionality

Email screen

Option	Description
Search and folder views	On the left side of the Email screen, you can search for a specific email message or switch the folder view.
Email list	The left side of the Email screen displays the email issues that are assigned to you.
Reading pane and email actions	When you select an email, the email message displays on the right side of the screen. At the top of the email, you can access actions, such as **Reply**, **Forward**, **Add attachment**, and **Send**. You might need to click **More** ( ) to view some options.
Customer details	At the bottom of an email message, you can view customer details.

Chat screen

Option	Description
Assigned chats tab	On the left side of the screen, you can see all of the open chat or IM conversations assigned to you. When you select a chat, the content displays on the right side of the screen.
Archived chats tab	After you end an IM conversation, the conversation is stored in the Archived chats tab. You can use this tab to search for archived conversations on your server. You can also view other agents' conversations.
Customer details	At the bottom of a chat conversation assigned to you, you can view customer details.

Supervisor Realtime Information and Reporting functionality

Supervisors can access agent functionality and the following additional functionality:

- Realtime Information

- Reporting

Realtime Information screen

Name	Description
Realtime statistics	You can monitor the following in real time: • Groups • Agents • Queue When you click on each category, the system displays a high-level list of items. You can click each item to view details, such as current status of agents or agent groups, details of current calls, and current service statistics. You can sort and filter the organization of real time information. **Note:** Do not monitor more than 25 agents at a time. If you monitor multiple agent shifts, you must have multiple accounts for each group and then log in to the appropriate account for each shift.

Reporting screen

Button	Description
Choose Report	You can select a report type from the available options, which are configured by your administrator.
View Report	You can view the last generated report after you select a report type. The options are: • Display the report in full screen mode. • Download the report to your Google Drive. • Print the report.
Run Report	You can generate a new report after you specify the start and end dates for the reporting period. You can see the status of the report being generated. You can continue browsing through reports while the system generates a new report.

Related links

Realtime Information screen statistics for supervisors on page 27

Realtime Information screen statistics for supervisors

The statistics on the Realtime Information screen enable supervisors to monitor real time activities in the contact center. The statistics on this screen show information at the individual topic or group level. Topic-related monitoring statistics are displayed in the corresponding group that is mapped to the topic in the IP Office Contact Center User Interface for Windows Administration tab.

The following tables describe the key telephony, email, and chat statistics on the Realtime Information screen.

Telephony statistics on the Realtime Information screen

Statistic	Description
Abandoned call monitor	The percentage of calls that were abandoned out of the total calls for each shift.
Service factor	The task service factor. This value is displayed as a percentage and indicates the overall quality of service.
Longest wait time	The longest wait time for a call in the queue.
Average wait time	The average wait time for calls in the queue.
Agents available	The number of available agents.
Total calls	The total number of answered and abandoned calls for each shift.

Chat statistics on the Realtime Information screen

Statistic	Description
Longest wait time	The longest wait time for an IM conversation in the queue.
Average wait time	The average wait time for an IM conversation in the queue.
Chats waiting	The number of waiting or pending IM conversations.
Agents available	The number of available agents.

Email statistics on the Realtime Information screen

Statistic	Description
Longest wait time	The longest wait time for emails in the queue.
Average wait time	The average wait time for emails in the queue.
Emails waiting	The number of waiting or pending emails.
Agents available	The number of available agents.
Total activated emails	The number of emails that were activated during the shift.

Related links

[Home screen statistics for agents and supervisors](#) on page 22
[Telephony users](#) on page 25
[Agent work states](#) on page 32

Part 1: Agent operations

Chapter 4: General agent operations

This chapter describes general agent tasks that are available for all agents regardless of which channels they are signed in to. These tasks are not unique to the telephony, email, or chat channels. General agent tasks include the following:

- Signing in and out of agent groups.
- Taking breaks: This feature is available to all agents regardless of which channels they are signed in to.
- Working with customer details: You can access customer details and take notes about customer interactions related to telephony, email, or chat. Some minor differences in functionality exist depending on whether you are using telephony, email, or chat.

Information that is unique to the telephony, email, and chat channels are not described in this chapter. You can find this information in the subsequent chapters.

Signing in and out of agent groups

About this task

Use this procedure to manually sign in to and sign out of agent groups. This procedure is not applicable if your administrator has configured automatic sign in with the IP Office Contact Center User Interface for Windows.

You can receive calls and, if applicable, emails and IMs from the groups that you are signed in to. The UI also displays your availability for the telephony, email, and chat channels, and indicates which channels you are signed in to.

Tip:

When the IP Office Contact Center User Interface for Chrome Devices is minimized, notifications are still visible. However, if you are using the IP Office Contact Center Web User Interface, you do not see notifications when your browser is minimized. Ensure you monitor the UI in your browser regularly so you do not miss important notifications.

Before you begin

Ensure your administrator has configured the required agent groups and virtual agent groups.

Procedure

1. On the Home screen:
   - To join all authorized agent groups, click **Join All Groups** (Join All 8 Groups).
   - To select specific groups, click **Select Groups** (Select Groups).
2. For each agent group, select whether you want to sign in to telephony, email, or chat.

   You can sign in to one or more of these channels. You can change the channels selected for each agent group at any time.

   Note:

   If your administrator has not configured the email and chat functionality, then these options are not available when you sign in.
3. To sign out of all selected groups, in the Select groups dialog box, click **Clear All**.

   You can also choose to sign out of a specific agent group.

Moving to a new agent group

About this task

You can move from one agent group to another during an active call. After you select the new authorized agent groups, you cannot receive calls from the groups you are no longer signed in to. You can receive calls from the new selected agent groups after you end the current call.

Procedure

1. In the left navigation pane, click **Telephony** ( ).
2. In the content area, click **Edit Groups**.
3. In the Select groups dialog box, click the appropriate agent groups.
4. **(Optional)** In the left navigation pane, click **Agent Groups** ( ) and move the slider to the right or left.

Viewing agent work states and other agent group details

About this task

The **Groups** tab displays the number of other agents available to answer calls. You can view information, such as the number of agents logged in and average wait time for calls. With this information, you can decide when to take a break, sign out, or switch agent groups. You can also expand individual groups to view detailed information about the group.

Procedure

1. In the left navigation pane, click **Telephony** ().
2. In the content area, click **Groups**.

   The system displays the number of agents signed in to the selected groups.
3. **(Optional)** To view individual groups, in the agent group, click **Expand** ( ).

   The system displays detailed statistics, including waiting callers.

   You can also:

   - Reserve a call from the queue.
   - Pick up a call.
   - Return a call from the list of abandoned calls.

Agent work states

Agents work states include the following:

- Signed off
- Available
- Do not disturb (DND)
- Busy

You can filter agents by status. For example, you can choose to only view agents that are set to "Available".

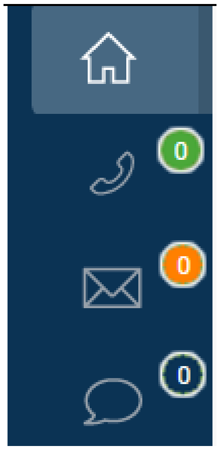
Note:

- Logged off agents are not displayed in the UI. If an agent is logged in to the interface, but not signed in to an agent group, the agent status displays as "Signed off". The agent status changes to "Available" when the agent signs in to the group. When the agent logs out of the interface, the agent is no longer listed in the UI.
- The "Available" state only appears if an agent is not on break or on a call. "Available" is overridden by other work states, such as "On Break" and "Busy".

Channel availability

The UI also uses colors to indicate whether you are signed in to all groups for a channel. In the following image example, the agent is:

- Signed in to all telephony groups. The agent is fully available on the Telephony channel.
- Signed in to one email group. The agent is partially available on the Email channel.
- Not signed in any groups for chat. The agent is not available on the Chat channel.



Starting and ending a break

About this task

When you request a break, you might be prompted to select a code describing the type and duration of the break. Agents that are also logged in to IP Office Contact Center User Interface for Windows cannot use break codes.

Procedure

1. To view your Worked, On Break, and Last Break status, click in the left navigation pane.

   You can see the status information for the telephony, email, and chat channels.

2. To start or end a break, click the button below .

Result

Your request to take a break might not be granted right away. The grey indicator appears next to the appropriate channel when your break request is pending..

When your break is granted, the red indicator displays next to the channels you are signed in to. While you are on break:

- You cannot receive any calls. You start receiving new calls again after you return from break.
- You cannot receive any IMs. You start receiving IMs again after you return from break.
- You cannot activate emails. The **Activate** button becomes available again when you return from break.

Agent break and work statistics

You can view the following work and break time information for an agent:

UI statistic	Description
On Break	The time spent on break during the current shift.
Last Break	The time since the agent returned from their last break and resumed work.
Worked	The time spent working during the current shift.

Example scenario

An agent works for 40 minutes and then goes on break for 5 minutes. When the agent resumes work, the **Last Break** timer resets to `0`. If the 5 minute break is the agent's first break for the shift, **On Break** displays `00:05`.

After 10 minutes of working:

- **Worked** displays `00:50`. This includes the 40 minutes spent working at the beginning of the shift plus the 10 minutes spent working since the agent returned from their last break.
- **Last Break** displays `00:10` because the agent has been working for 10 minutes since the last break.
- **On Break** continues to display `00:05` because, so far, the agent only spent 5 minutes on break during the current shift.

Break policies and restrictions

Your administrator can configure a sign out prevention quota in IP Office Contact Center User Interface for Windows to automatically restrict agent breaks in IP Office Contact Center User Interface for Chrome Devices. This quota defines the minimum number of agents that must remain signed in to agent groups, preventing too many agents from taking a break at the same time. Your supervisor controls break times to ensure that enough agents are available to handle calls. If the system reaches the sign out prevention quota, IP Office Contact Center does not grant your break. For example, you might not be able to take a break when:

- Call volume is high.
- Multiple agents are already on break. A certain number of agents must always be available.
- Another break was taken recently.

The grey indicator appears next to the appropriate channel when your break request is pending. If you request a break while you are on a call, your break request is granted after the call is completed. When your break is granted, the red indicator displays next to the channels you are signed in to.

Working with customer details

About this task

You can view customer details at the bottom of an email or IM conversation, while you are on an active call, or during wrap-up time for a call.

You can also:

- Take notes and view notes from other agents.
- View information resources from configured websites.

  Depending on your web access configuration, a browser window or tab might automatically open in the UI.

Before you begin

To perform research on the internet, your administrator must configure the websites you can access.

Procedure

1. If you are on a call, click **Call Details** in the content area.

   Customer details automatically appear at the bottom of emails and IM conversations.

2. To view general information, click **Customer Details** ( ).

   The following type of information appears if available:

   - Name
   - Phone number
   - Account number

3. To enter notes, click **Notes** ( ) and describe the customer issues in the text area.

4. To view a history of notes entered by other agents, click **History** ( ).

   Long notes are partially visible. You might need to expand an entry to read the full note.

   Important:

   The History tab is not available for chat. You can use this feature with telephony and email.

5. To search for additional customer records, such as email exchanges, click **Search** ( ).

   You can search by:

   - Telephone number
   - Email ID
   - Jabber ID

6. To perform research on the internet, click on an available website.

Depending on your system configuration, a browser window or tab might automatically open in the UI.

Chapter 5: Telephony

This chapter describes how to perform telephony tasks. For information about general agent operations, such as working with breaks and customer details, see the “General agent operations” chapter.

To use telephony functionality, you must enable telephony when you sign in to your agent groups. From the Telephony screen, you can handle incoming and outgoing calls, and view telephony statistics for the shift. You can also view customer details while you are on an active call or during wrap-up time for a call.

Note:

If you lose connection to the server while on a call, the Telephony screen becomes unresponsive and you might not see the complete call details. After the connection to the server is restored, you might need to log out and log back in to the UI. Your call remains connected when you log out of the UI. Call details will appear properly starting with the next call, but you might not see the correct call details for the current call.

Call duration

While on an active call, you can see the call duration timer. The talk time displayed on the timer is calculated for the current call. The talk time does not include the time taken for internal transfers and putting calls in the queue. You can see if the call duration exceeds the predefined average talk time.

Mute and adjust volume during a call

You can use the controls on the Chrome OS device, WebRTC client, or headset to:

- Adjust audio and microphone volume.
- Mute audio.

Outbound dialer calls

IP Office Contact Center uses the outbound dialer functionality to automatically assign outgoing calls to agents. An outbound caller ID is generated for each call. Outbound dialer calls can be set up in the following ways:

- IP Office Contact Center makes the outgoing call automatically. After the connection with the called party is established, IP Office Contact Center immediately distributes the call to an agent to handle.
- IP Office Contact Center distributes details about the call to an agent in preview mode. The agent then makes the call manually.

For more information about outbound dialer, see:

- *Avaya IP Office Contact Center Feature Description*
- *Administering Avaya IP Office Contact Center Dialer*

Call response and qualification types

When you are on an outbound dialer call, the call area can display one of the following responses. You must select the appropriate response code at the end of the call.

Outbound dialer call responses

Type of response	Description
Call answered by intended recipient	The recipient answers the call, and you confirm that the person at the other end is the intended party.
Call answered, but intended recipient unavailable	The recipient answers the call, and you confirm that the person at the other end is not the intended party. You can leave a message asking the intended party to call back and then disconnect the call.
Call answered by voice mail	The call is connected and reaches the voice mail box or answering machine. You can leave a message asking the intended party to call back and then disconnect the call.
Called number is busy	The call is unanswered, and you hear a busy tone. The system tries to make the call again.
Called number not in service	The call is unanswered, and you hear a fast busy tone or an automatic announcement that the number is not in use.
Call answered by fax machine	The call is connected and reaches a fax machine or modem.
No Answer	The call is connected, and you hear a call back tone. If the maximum wait time for an answer is exceeded, the call disconnects automatically. The system tries to make the call again later.
Wrong Number	The recipient answers the call, and you identify that the number is no longer used by the intended party.

Closure options

You can select closure options defining the outcome of the call. Example of closure options are described in the following table.

Option	Description
Closure ()	Specifies that the call was unsuccessful and provides an explanation, such as: • Follow Up • Wrong Number • New Number

Table continues…

Option	Description
Closure RPC ( )	Confirms that the job was completed.
Closure as Fax Abandoned Call ( )	Specifies that a fax machine answered the call.

Managing calls in the user interface

Answering calls

About this task

After you sign in to your agent groups, the **Telephony** ( ) button on the left flashes if you have an active call.

Procedure

In the call area, click **Answer** ( ).

The UI displays the caller name and number, the routed topic, and the queue time.

Making a call

About this task

Use this procedure to make calls. If you are using a Chrome OS device, you can choose to manually dial numbers using the Chrome numeric keyboard.

Before you begin

Ensure you have access to the phone book for internal calls.

Procedure

1. In the call area, click **Dial** ( ).
2. To make a call by dialing a number manually, do the following:
   a. In the pop-up menu, click **Manual**.
   b. In the **Enter Number** field, provide one of the following:
      - Destination number
      - Topic number
      - Extension number
   c. To start the call, click **Phone** ( ).

3. To make an internal call to a phone number in your contact list, do the following:
   a. In the pop-up menu, click **Internal**.
   b. From the contact list, select the number to dial and then click **Phone** ( ).

Making conference calls

Before you begin

An active call must be in progress.

Procedure

1. In the call area, click **Consultation** ( ).
2. In the pop-up menu, do one of the following:
   - In the **Internal** tab, click **Phone** ( ).
   - In the **Manual** tab, type a destination number in the **Enter Number** field and click **Phone** ( ).

   The system establishes a two-party call with the agent.
3. To add a third party to the conference, do the following:
   a. Dial the third-party number.
   b. Request permission to add the party to the conference call.
   c. Click **Conference** ( ).

   The system establishes a three-way conference call.
4. If there is no response from the third party, click **Hang up** ( ).
5. To drop one of the parties from the conference call, click **Hang up** ( ) next to the number that you want to drop.

   The other two parties remain connected.

   If you hang up, the other two parties remain on the call.

Putting calls on hold

Before you begin

An active call must be in progress.

Procedure

1. In the call area, click **Hold** ( ).

2. To resume the call, click **Hold** ( ) again.

Inserting DTMF digits

About this task

You might need to enter dual-tone multi-frequency (DTMF) digits during certain calls. For example, in your voice mailbox, you use DTMF digits to enter your login password and select options.

Procedure

1. In the call area, click **More** ( ).
2. Click **DTMF** ( ).
3. Select the required digits.
4. Click **Close** ( ) to close the window.

Transferring calls

About this task

You can perform consultative and unsupervised call transfers. With consultative transfers, you request permission before completing the transfer. With unsupervised transfers, you perform the transfer without permission from the party that the call will be transferred to.

Before you begin

An active call must be in progress.

Procedure

1. In the call area, click **Consultation** ( ).
2. In the pop-up menu, do one of the following:
    - In the **Internal** tab, click **Phone** ( ).
    - In the **Manual** tab, type a destination number in the **Enter Number** field and click **Phone** ( ).
3. Click **Transfer** ( ).

    If required, ask for permission before transferring the call. You can also transfer the call without asking for permission.
4. If the extension is busy, click **Hang up** ( ) next to the call that you want to drop.

    The caller is informed that the call cannot be transferred.

Requesting supervisor support during a call

About this task

During a call with a customer, you can request emergency assistance from a supervisor. The supervisor joins the call to provide assistance.

Before you begin

An active call must be in progress.

Procedure

In the call area, click **Emergency** ( ).

The **Notification** ( ) icon turns red and a signal is activated on the supervisor's interface.

Result

The supervisor can join the call at any time. If the supervisor hangs up, you and the customer remain connected on the call.

Ending calls

About this task

You automatically enter wrap-up or After Call Work (ACW) time at the end of a call. During wrap-up time, you can select job codes that define the outcome or result of the call. You cannot receive a new call until you finish selecting job codes.

Procedure

1. In the call area, click **Hang up** ( ).

   When the call disconnects, you automatically enter wrap-up time. A timer shows the amount of time you have by default.

   If a job code is mandatory for the call, the **Job Codes** button flashes until you select a job code.

2. In the pop-up menu, select the required job codes and enter any other required notes for the call.

   You can enter a key word in the **Search** field to find a job code.

3. **(Optional)** To extend your wrap-up time, click **Extend ACW** ( ).

4. When you have finished selecting job codes and entering notes for the call, click **Finish**.

   Wrap-up time ends. You can receive new calls.

Managing calls with a Plantronics headset in the IP Office Contact Center User Interface for Chrome Devices

About this task

With the IP Office Contact Center User Interface for Chrome Devices, you can answer and end calls using your Plantronics headset. You can also adjust volume using your headset.

The following procedure describes how to answer and end calls using a Plantronics headset.

Important:

You cannot use your headset to control calls with the IP Office Contact Center Web User Interface. This functionality is only supported on the IP Office Contact Center User Interface for Chrome Devices.

Before you begin

Ensure the following:

- You are using IP Office Contact Center User Interface for Chrome Devices on a supported Chrome OS device.
- You have a supported Plantronics headset. For information about supported devices, see https://support.avaya.com/CompatibilityMatrix/Index.aspx. Call control functionality is not supported with other headsets.
- Your headset uses a wired USB connection. Other connection types, such as bluetooth or a standard headphone jack connection, are not supported.
- Integrated phone mode is selected. This feature will not work with an external phone.

Procedure

1. Connect your headset to your Chrome device.
   - You can connect your headset first and then launch the UI.
   - You can launch the UI first and then connect your headset to the Chrome device.
2. Open the Telephony screen in the UI.
3. To answer an incoming call or hang up, press the **Call** button on your headset.

   Note:

   If you answer a call with your headset, you should also hang up the call with your headset. If you answer a call with your headset and end it on the UI, then you will need to press the **Call** button on your headset twice to answer a second incoming call.

Chapter 6: Email and chat

Email operations

You can perform the following tasks from the Email screen if you enable email when you sign in to your agent groups:

- View unread emails. When you receive a new email, a visual notification displays in the UI.
- Create and send emails.
- Reply to the sender of an email or to all users on the email distribution list.
- Forward an email to one or more people.
- Delete emails. You can only delete topic emails if your administrator has given you the appropriate privilege.
- Save email drafts. For example, if you start typing an email but cannot finish right away, then you can save the draft and finish typing the email later.
- Add attachments, such as files and images, to an email before sending it.
- View customer details at the bottom of a customer email.
- Reassign or delegate customer emails to another agent or supervisor.
- Update the status of emails. After you finish addressing a customer action, you can set the email status to “Completed”. If you cannot address a customer issue right away, you can set the email status to “Defer” and then follow up on the email later.
- Select job codes that define the outcome of the email exchange.
- Print emails.
- View archived emails if your administrator has given you the appropriate privilege.

Searching for emails

About this task

You can search for emails in any folder and sort emails by criteria. The left side of the Email screen lists the emails that are assigned to you.

Note:

You can only search for keywords in the email subject and not in the email body.

Procedure

1. From the drop-down menu, select the folder that you want to search.
2. In the **Search** field, type keywords and then click .

   For example, you can type part of the subject.

   Tip:

   You might need to click **More** for the UI to display the latest search results.
3. **(Optional)** Sort emails based on the available criteria.

   You can sort emails by the:

   - Date received
   - Name of the sender in alphabetical order
   - Topic to which the email is allocated in alphabetical order

Saving an email draft

About this task

If you cannot finish an email right away, you can save a draft and then finish the email later. You can access saved emails from the Drafts folder.

Procedure

1. Start typing an email.
2. To save a draft of the email, click **Save** ().

Creating, replying to, and forwarding emails

About this task

You can create new emails, reply to emails assigned to you, and forward emails. New, unread emails have a blue indicator, and these emails are considered inactive.

When working with customer emails, you can access available customer details and take notes about your current interaction. For more information about customer details, see Working with customer details on page 35.

Before you begin

Before replying to an inactive email, you must click the **Activate** button. **Reply** replaces the **Activate** button.

Procedure

1. Do one of the following:
   - To create a new email, click **Compose** ( ).
   - To reply to the sender of an email, click **Reply**.
   - To reply to everyone on the email distribution list, click **More** ( ) and then select **Reply all** ( ).
   - To forward an email to someone, click **Forward** ( ).
2. If you are creating a new email, enter a subject.
3. Type a message.
4. **(Optional)** Do one of the following to add an attachment:
   - Click **Add attachment** ( ) and then select the file that you want to attach.
   - Drag and drop the file that you want to attach onto the email.
5. When you are ready to send the email, click **Send**.

Selecting a job code

About this task

Use this procedure to select a job code. If you already selected a job code, you can also update your selection. Only one job code can be associated with an email topic.

Before you begin

Your administrator must configure job codes in the IP Office Contact Center User Interface for Windows. When configuring job codes in the IP Office Contact Center User Interface for Windows, your administrator can choose whether to make job code selection mandatory or optional.

Procedure

1. Select the appropriate email.
2. Click **More** ( ).
3. Click **Job Codes** ( ).
4. Select a job code from the list.

   You can search for a specific job code using the **Search** field.
5. Click to submit your selection.

Result

The job code selected for an email displays in the email header.

Changing the status of an email

Setting an email to “Complete”

About this task

When configuring job codes in the IP Office Contact Center User Interface for Windows, your administrator can choose whether to make job code selection mandatory or optional. If job code selection is mandatory, you must select a job code before you can set an email to “Complete”. If job code selection is optional, you can set an email to “Complete” right away without selecting a job code.

Procedure

1. Select the appropriate email.
2. Click **More** ().
3. **(Optional)** If job code selection is mandatory, select a job code.
4. Click **Complete** ().

Result

Completed emails are stored in the Completed folder. These emails do not appear in your Inbox.

Deferring an email

About this task

If you cannot immediately address a customer email, you can put the email item on hold and then address it later. When you defer an email, you can set a follow-up date and add notes for yourself.

Procedure

1. Select the appropriate email.
2. Click **More** ().
3. Click **Defer** ().
4. In the pop-up window:
    a. Click and select a follow-up date.
    b. Use the arrows to select a follow-up time.

       For example, you can set the follow-up time to `12:28 PM`.
    c. **(Optional)** Enter a note for yourself.
    d. Click **OK**.

Result

The deferred email is stored in the Delayed folder until the follow-up date. At the specified time, the email reappears in your Inbox.

Reassigning an email

About this task

You can reassign or delegate an email to another agent or supervisor. You can also delegate an email to a specific topic.

Procedure

1. Select the appropriate email.
2. Click **More** ( ).
3. Click **Delegate** ( ) to reassign the email.
4. In the pop-up window, do the following:
    a. Select the appropriate agent, supervisor, or topic from the list.

       You can use the **Search** field to help you find a specific name.
    b. **(Optional)** Enter a note or instructions.
    c. Click .

Result

Reassigned emails no longer appear in your Inbox.

Chat operations

You can perform the following tasks from the Chat screen if you enable chat when you sign in to your agent groups:

- View unread instant messaging (IM) notifications. When you receive a new IM, you can see a visual notification in the UI.
- Respond to an IM from a customer. Agents cannot start a new IM conversation.
- Work with multiple IM conversations at a time. The default is three.
- Use spell check if you have internet access.
- Print an IM conversation.
- View customer details during an IM conversation.
- View completed or archived conversations.

Replying to a chat conversation

About this task

Use this procedure to reply to an IM from a customer. New, unread customer conversations have a blue indicator. You can work with multiple conversations at a time.

During an IM conversation with a customer, you can access available customer details and take notes about your current interaction. For more information about customer details, see Working with customer details on page 35.

Procedure

1. On the left side of the Chat screen, click the **Assigned chats** tab.
2. Select the appropriate IM conversation.

   New, unread conversations are automatically activated when you select them.
3. Type a message.

   Tip:

   When you copy text from documents, such as Microsoft Word or PDF documents, some characters, such as single or double quotes, might not appear properly. If you copy text, retype these characters manually before sending your IM.
4. To send your IM, do one of the following:
   - Click .
   - Press `Enter` on your keyboard.

Related links

Enabling and disabling spell checks on page 49

Enabling and disabling spell checks

About this task

You can enable and disable the spell check functionality during an IM conversation.

Before you begin

Ensure that you have internet access.

Procedure

1. On the left side of the Chat screen, click the **Assigned chats** tab.
2. In the IM conversation, use the abc and ✓abc buttons to enable or disable the spell check functionality.

Related links

Replying to a chat conversation on page 49

Ending a chat

About this task

After a customer issue is resolved, you can complete or end the chat conversation. After you end a conversation, you cannot reopen it.

Procedure

1. On the left side of the Chat screen, click the **Assigned chats** tab.
2. Select the appropriate IM conversation.
3. At the top right of the IM conversation, click **End chat**.
4. In the pop-up window do the following:
    a. Select one of the available job codes.

       You can search for a specific job code using the **Search** field.
    b. Click ↵ to submit your selection.

Result

Completed conversations are stored in Archived chats. These conversations are removed from Assigned chats.

Searching for archived conversations

About this task

After you end an IM conversation, the conversation is stored in the Archived chats tab. You can search for any archived IM conversation on your server.

Note:

If you do not replace copied characters, such as single and double quotes, then the conversation that contains these characters might not appear in the Archived chats tab.

Procedure

1. In the Chat screen, click the **Archived chats** tab.
2. Use the first drop-down menu to filter conversations by date.

   You can view conversations from:
    - Today. This option is set by default.
    - The last 7 days.
    - The last 15 days.

- The last 30 days.

3. **(Optional)** In the **Search** field, type keywords and then click .

   For example, you can enter a topic name to find IM conversations related to that topic.

4. **(Optional)** To search for a specific agent's conversations, select the agent from the drop-down menu below the **Search** field.

5. Select the conversation you want to view.

   The conversation appears on the right side of the screen.

Related links

Replying to a chat conversation on page 49

Part 2: Supervisor operations

Chapter 7: Real time information

This chapter describes what supervisors can do using the Realtime Information feature.

Realtime Information is organized in the following tabs:

- Agents
- Groups
- Queue
- Other

You can click on an item in the tabs to expand it. Some of the agent and group information provided is also available to agents. For a detailed description of agent statistics, including break and work time statistics, see the “Agent operations” part in this document.

You can access additional configuration options for Realtime Information feature from the IP Office Contact Center User Interface for Windows.

Viewing agent and group information in real time

About this task

Real time monitoring enables you to manage agent actions and perform customer service tasks when needed.

Note:

Do not monitor more than 25 agents at a time. If you monitor multiple agent shifts, you must have multiple accounts for each group and then log in to the appropriate account for each shift.

Procedure

1. On the Home screen, sign in to the agent groups you want to manage.

   You can also send a message to agents if needed.

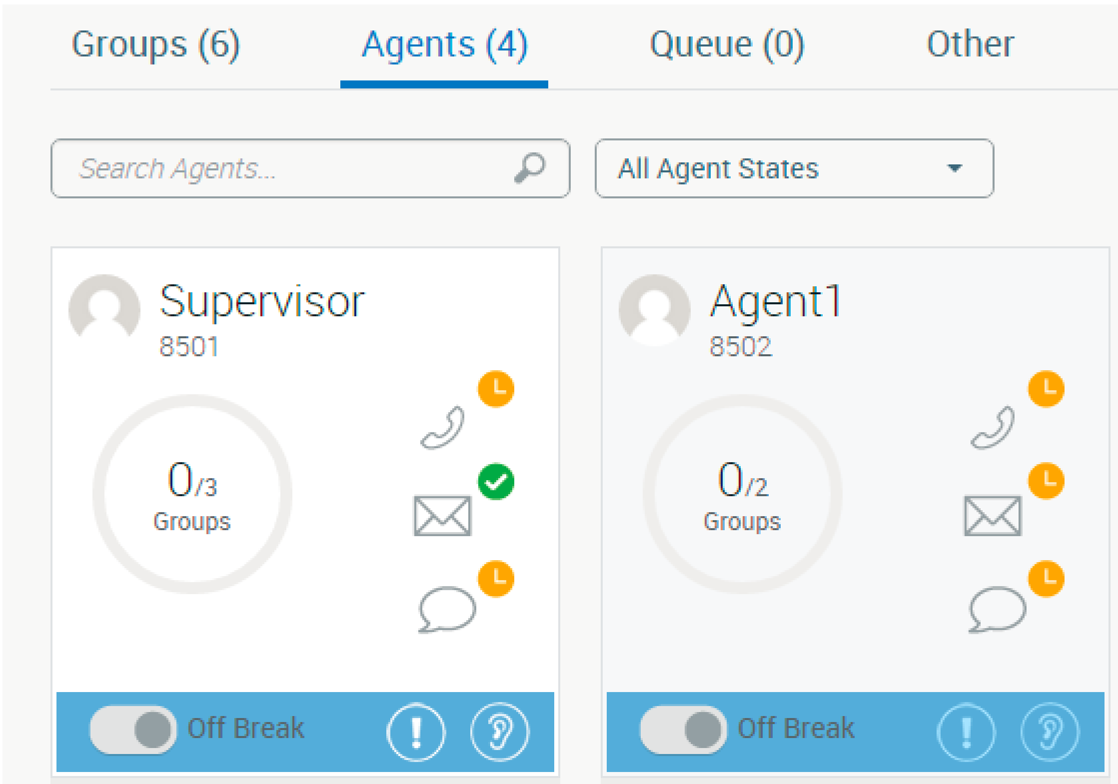
2. Click the **Realtime information** ( ) tab.
3. To view and update information for a specific agent, click the **Agents** tab.

   You can:

   - Search for an agent or work state.

- View agent work states and break information. You can also force an agent to take a break or log out.
- View the agent groups that the agent is signed in to.
- View the channels that the agent is signed in to. The available channels are telephony, email, and chat.

The following image provides an example of the type of information you see in the Agents tab.



4. To monitor an agent group and add or remove agents from the group:
    a. Click the **Groups** tab.
    b. Expand the group you want to view in detail.

       When you expand the group, you can see agent information, waiting calls in the queue, and abandoned calls.

Related links

Signing in and out of agent groups on page 30
Agent work states on page 32
Agent break and work statistics on page 33

Assigning calls in the queue

About this task

You can assign a waiting call to yourself or to another agent.

Procedure

1. On the Home screen, sign in to the agent groups you want to manage.
2. Click the **Realtime information** () tab.
3. Click the **Groups** or **Queue** tab.

   The Groups tab enables you to see the waiting calls for a specific agent group. The Queue tab shows all waiting calls.
4. Select the appropriate user from the **Assign to** drop-down menu.

Monitoring agent calls

About this task

As a supervisor, you can silently monitor calls anytime. You can also join calls when an agent requests emergency assistance.

Procedure

1. On the Home screen, sign in to the agent groups you want to manage.
2. Click the **Realtime information** () tab.
3. To monitor agent calls silently, click from the Agents, Groups, or Queue tab.

   The agent and customer cannot hear you and are unaware that you are on the call.
4. If an agent requests emergency assistance, join the call actively.

   The indicator glows when an agent requests emergency assistance.

   When you join the call, it becomes a three-way conference between you, the agent, and the customer. If you drop from the call, the agent and customer still remain connected.

Viewing other variables in real time

About this task

Use this procedure to view variables and objects that are not in the other tabs.

Procedure

1. Click the **Realtime information** () tab.
2. Click the **Other** tab.

Result

The screen displays the available variables and the associated value for each variable.

Chapter 8: Reports

You can view and generate manual historical reports from the **Reports** tab. The reports record, examine, assess, and present all important IP Office Contact Center system data.

Reporting data

Reports evaluate the performance of the IP Office Contact Center system and calculates agent hours to bill clients. You can also process reports data using staff planning tools, or other business programs.

Reports gathers and classifies numeric data and other information, such as job codes and skill combinations for defined objects such as agents, topics, and agent groups. You can also create records of individual telephone conversations. With reports, you can display and process the data that you collect.

The database stores all report values. The recorded data is the basis for further evaluations or special algorithms. You can collect data and evaluate results using the report generator server and report viewer components.

Advantages of reporting

You can use reports to:

- Ensure continuous quality of service. You can also identify peak times that can be counteracted by the coordinated employment of staff.
- Use the previous evaluation as a basis to address seasonal or event-related increases in customer requests.
- Record feedback about promotions and marketing measures.
- Determine the time needed for processing a service. You can also use this information to calculate expenses.

Reporting types

Your administrator can configure the following types of reports. You can only generate reports that your administrator has configured.

- Agent report
- Agent group report
- Telephone report
- Dialer report
- Skill combination report
- System report
- Team report

- Topic report
- IVR report

Report types

You can activate reports for two different user groups:

- Private: You can enable private reporting for the user who defined the report.
- Public: You can enable reporting as public, so that all users with privileges can view the configured report type.

You must define a time frame for the report survey. The options are months, weeks, days, total period, and a user-defined time in hours and minutes.

The report is displayed in the following formats:

- Tabular format: The report displays as a table. The order of events is organized based on custom groupings.
- Graphical display: The report displays as a line graph, bar chart, or pie chart. This display is not available for all agent groups and topic counters.

You can view reports in the following ways:

- View the report on the screen.
- Export the report into a `.csv` file.

Viewing existing reports

About this task

You can view reports that you generated in the past using the IP Office Contact Center User Interface for Chrome Devices.

Note:

If the administrator updates a report, then the previous version of the report is overwritten. IP Office Contact Center User Interface for Chrome Devices displays the new version of the report. The old version of the report is no longer displayed.

Before you begin

Ensure your administrator configures the setting **Use basic data period/output only** in the IP Office Contact Center User Interface for Windows for each report. Otherwise, the reports will not be displayed in the user interface.

Procedure

1. Click the **Reports** () tab.

2. Select **View Report**.
3. To find the appropriate report, in the Choose a Report screen, do one of the following:
   - Enter a key word in the **Search** field.
   - Scroll down through the list of all reports.

   The system displays the selected report on the right side of the screen.
4. To view the report in full screen mode, click **Toggle view** ( ).
5. To download the report, click **Download** ( ).
6. To print the report, click **Print** ( ).

Generating a report

About this task

You can create a new report using the IP Office Contact Center User Interface for Chrome Devices. You must choose one of the available report types.

Procedure

1. Click the **Reports** ( ) tab.
2. Select **Run Report**.
3. To find the report, in the Choose a Report screen, do one of the following:
   - Enter a key word in the **Search** field.
   - Scroll down through the list of all reports.
4. To set the specifications for your report, do the following:
   a. Select a start and an end date, and a time.
   b. If you want to limit the days and times for which reports are generated, select the appropriate options in **Only Report**.
5. To create a new report, click **Generate Report**.

   The system displays a status bar in the **View Report** field indicating the progress of the report.
6. To view the report in full screen mode, click **Toggle view** ( ).
7. To download the report, click **Download** ( ).
8. To print the report, click **Print** ( ).

Glossary

After Call Work mode	A mode in which agents are unavailable to receive calls. Agents enter the After Call Work (ACW) mode to complete forms, select job codes, or perform other activities that are related to a previous call.
agent	An agent who typically handles customer service tasks. A user can be associated to an agent. Only agents can receive tasks from call center routing. An agent can log in to one or more specific media types. The agent media states are independent of each other. For example, an agent can be signed on for email and signed out for voice. Agents can belong to one or more agent groups.
agent group	A tool for categorizing and organizing agents. Agent groups are used as routing targets for customer calls and emails. The UI tracks customer service statistics for agent groups. Skills are allocated to agents in agent groups, and calls can be routed to agents based on their skills. An agent can be part of multiple agent groups. Agents must sign on to an agent group to receive calls that are routed to that group.
Automatic Call Distribution	A programmable feature at the contact center. Automatic Call Distribution (ACD) handles and routes voice communications to queues and available agents. ACD also provides management information that can be used to determine the operational efficiency of the contact center.
module	An IP Office Contact Center component or application. The components for the Agent, Supervision, and Administration tabs in the IP Office Contact Centerinterface are examples of modules. The Wallboard application is also referred to as a module.
Task flow	A process that explains how each telephony, voice, email, or chat task type is processed within IP Office Contact Center. For every task type, a task flow set can be defined.
user	Agents, supervisors, or administrators that can log in to the IP Office Contact Center UI to use or administer parts of the system. Unique privileges can be assigned to each user.
Wrap-up time	The time that a call center agent spends completing a transaction after the call is disconnected. Wrap-up time starts automatically and includes work directly associated with the call, such as taking notes or selecting job

codes. The time does not include time spent in meetings, breaks, or correspondence.

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