



# Using Avaya one-X<sup>®</sup> Agent

Release 2.0  
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# Chapter 1: Introduction

Avaya one-X Agent Release 2.0 is an integrated telephony softphone solution that provides seamless connectivity to at-home agents, remote agents, outsourced agents, contact center agents, and agents interacting with clients having vocal and hearing impairment. This is the second release of Avaya one-X Agent and has number of enhancements in addition to the features available in the Release 1.0.

Agent collaboration, supervisory support, and central administration capabilities are the main enhancements of Avaya one-X Agent Release 2.0. These enhancements are supported by Presence Services, System Manager, and Communication Manager. Avaya one-X Agent Release 2.0 also relies on the Call Center features of Communication Manager.

In addition to the features present in release 1.0, Avaya one-X Agent now supports new features such as instant messaging, hot-desking, supervisor monitoring, central management, TTY interaction, desktop sharing, and single sign on. The availability of new features depends on the type of Avaya one-X Agent license used for deployment.

All the enhancements are achieved maintaining the same user interface to help users adapt quickly to the new features presented in this release.

## **Related topics:**

[Supported languages for Avaya one-X Agent](#) on page 9

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## **Supported languages for Avaya one-X Agent**

Avaya one-X Agent 2.0 supports the following languages on the UI. The localized interface should be available with the upcoming service pack release.

- Simplified Chinese
- Traditional Chinese
- Dutch
- French
- German
- Italian
- Japanese
- Korean
- Brazilian Portuguese

## Introduction

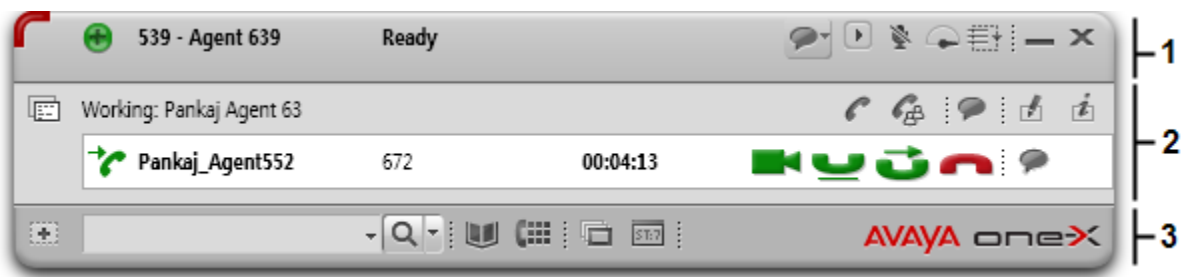
- Russian
- Spanish

# Chapter 2: Familiarizing with the Avaya one-X Agent UI

## Avaya one-X Agent main window

Avaya one-X Agent occupies as little space as possible on your computer screen and provides a common look-and-feel providing a flexible GUI configuration option to match the type of work an agent performs. The main window provides complete access to all features of Avaya one-X Agent.

The following illustration explains most of the components of the main window.



1	<a href="#">Top bar</a> on page 11
2	<a href="#">Work List window</a> on page 16
3	<a href="#">Action bar</a> on page 22

### Note:

Certain features will not be available in the application if you have not logged into the Automatic Call Distribution (ACD) service in Communication Manager.

## Top bar

The top bar appears on top of the main window. The top bar provides the system status and main controls to operate Avaya one-X Agent. The following illustration explains the different parts of the top bar.



1	<a href="#">Message-waiting indicator</a> on page 12
2	<a href="#">Agent status and system messages</a> on page 12
3	<a href="#">Common controls</a> on page 14
4	<a href="#">System Options</a> on page 15
5	<a href="#">UI controls</a> on page 16

## Message-waiting indicator






A message-waiting indicator appears only if voice mail system is integrated with Avaya one-X Agent.


A message-waiting indicator notifies that the voice mailbox contains messages. The message-waiting indicator appears at the top left corner of the top bar. The indicator changes its state when you have an unread voice message in your voice mail system. The following is the voice mail indicators that appear on the top bar:

Icon	Name	Description
	<b>No Messages</b>	This icon appears when there are no new messages in the voice mail system. You can also click the blank icon to the voice mail system, if available.
	<b>Unread Messages</b>	This icon appears when there is an unread message in the voice mail system. Clicking the icon will connect to the voice mail system, if available.

## Agent status and system messages



















The agent status icons appear on the right corner of the top bar with the corresponding agent status. You will also see an agent's name or extension number with the corresponding system status. Further, you may see temporary messages including system error, network failure, or scheduled backup, as appropriate. The following is the possible agent status icons that appear on the top bar:





Icon	Name	Description
	<b>Ready</b>	This icon appears when you choose the agent status to <b>Ready</b> from the <b>Change Agent State</b> drop-down arrow. The <b>Ready</b> message indicates that you are ready to receive calls coming from a Communication Manager. In addition, Communication Manager delivers ACD calls only if you have no currently active telephone calls or ACD Work Items in the Work List window. For the procedure to change your agent work status, see <a href="#">Changing the agent work status</a> on page 81.
	<b>Auxiliary</b>	This icon appears when you choose the agent status to <b>AUX</b> from the <b>Change Agent State</b> drop-down arrow. The <b>AUX</b> message indicates that you are not ready for ACD calls. However, you can still make and receive calls on your station but not extension and make calls to a contact outside the contact center. For the procedure to change your agent work status, see <a href="#">Changing the agent work status</a> on page 81.
	<b>Pending Auxiliary</b>	This icon appears when you attempt to change the agent status to <b>AUX</b> from the <b>Change Agent State</b> drop-down arrow while on an active call. The system creates a pending Auxiliary and changes the agent states to AUX only after you hang up the active call.
	<b>Log Out</b>	This icon appears when you choose the agent status to <b>Logout</b> from the <b>Change Agent State</b> drop-down arrow. The <b>Sign Out</b> message indicates that you have logged out from the ACD service. For the procedure to change your agent work status, see <a href="#">Changing the agent work status</a> on page 81.
	<b>Pending ACD Logout</b>	This icon appears when you choose the agent status to <b>Logout</b> from the <b>Change Agent State</b> drop-down arrow while on an active call. The system logs you out from the ACD service only after you hang up the call.

Icon	Name	Description
	<b>Pending Logout</b>	This icon appears when you choose to disconnect station from the <b>System Options</b> menu while on an active call.

## Common controls

Common controls appear on the left of the top bar to provide quick access to common functions. The following are the controls available on the top bar:


Button	Name	Description												
	IM Status menu	<p>You can set your IM status using this menu. The IM status set with this menu is displayed to others subscribing to your IM status. You can set the following IM status:</p> <table border="1"> <tbody> <tr> <td></td> <td><b>Available</b></td> </tr> <tr> <td></td> <td><b>Busy</b></td> </tr> <tr> <td></td> <td><b>Be Right Back</b></td> </tr> <tr> <td></td> <td><b>Away</b></td> </tr> <tr> <td></td> <td><b>Do Not Disturb</b></td> </tr> <tr> <td></td> <td><b>Offline or Log Out</b></td> </tr> </tbody> </table>		<b>Available</b>		<b>Busy</b>		<b>Be Right Back</b>		<b>Away</b>		<b>Do Not Disturb</b>		<b>Offline or Log Out</b>
	<b>Available</b>													
	<b>Busy</b>													
	<b>Be Right Back</b>													
	<b>Away</b>													
	<b>Do Not Disturb</b>													
	<b>Offline or Log Out</b>													
	<b>Agent Greetings</b> (start and stop)	<p>This is a toggle button to start or stop an agent-greeting playback. The Agent Greetings button is available in addition to any triggers that have been defined for automatic playing of a greeting. For the procedure to play agent greetings, see <a href="#">Playing agent greetings</a>.</p> <p> <b>Note:</b> The Agent Greetings button appears only if you have greetings configured in the Agent Preference dialog box. The button changes to active only after accepting an incoming call.</p>												

Button	Name	Description
	<b>Mute Phone</b> (mute and unmute)	<p>This is a toggle button to mute and unmute audio. To mute and unmute the system, see <a href="#">Muting and unmuting your workstation</a> on page 66.</p> <p> <b>Note:</b> The Mute Phone button is only visible and active in the My Computer configuration.</p>
	<b>Audio Monitor</b>	<p>This control allows you to view the current audio levels used for your microphone and speakers. To view the voice quality, see <a href="#">Monitoring the audio quality and VoIP traffic</a> on page 86.</p> <p> <b>Note:</b> The Audio Monitor button is only visible and active in the My Computer configuration.</p>

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## System Options



The System Options menu provides quick menus to control the Avaya one-X Agent application.

Button	Name	Description
	<b>System Options</b>	<p>The <b>System Options</b> menu provides the following controls:</p> <ul style="list-style-type: none"> <li>• <b>Agent Preference:</b> This option provides a centralized control to customize audio, video, and GUI.</li> <li>• <b>System Settings:</b> This option offers an extensive and robust set of tools to administer the Avaya one-X Agent application.</li> <li>• <b>Help:</b> This option provides quick access to the HTML help files.</li> <li>• <b>About Avaya one-X Agent:</b> This option displays the following details: <ul style="list-style-type: none"> <li>- Current Avaya one-X Agent version</li> <li>- Install directory</li> </ul> </li> </ul>

Button	Name	Description
		<ul style="list-style-type: none"> <li>- Data directory</li> <li>- Current telephony mode</li> <li>- Server IP</li> <li>- Supported features</li> </ul> <ul style="list-style-type: none"> <li>• <b>Station Disconnect:</b> This option allows you to log out of the station.</li> <li>• <b>Presence Server Disconnect:</b> This option disconnects you from the Presence server; that is logs you out of IM service. To reconnect, this option appears as <b>Presence Server Connect</b>.</li> <li>• <b>Exit:</b> This option allows you to close the Avaya one-X Agent application.</li> </ul>

## UI controls

Avaya one-X Agent provides the control to minimize and close the Avaya one-X Agent application. The following options are available:

Button	Name	Description
	<b>Minimize Window</b>	Clicking this button minimizes the application in to the task bar.
	<b>Close Application</b>	Clicking this button closes the application from your personal computer. The systems prompts you if you want to exit if you have an active work item, and if you click Yes, the system closes the application. For details, see <a href="#">Closing the Avaya one-X Agent application</a> on page 89.

## Work List window

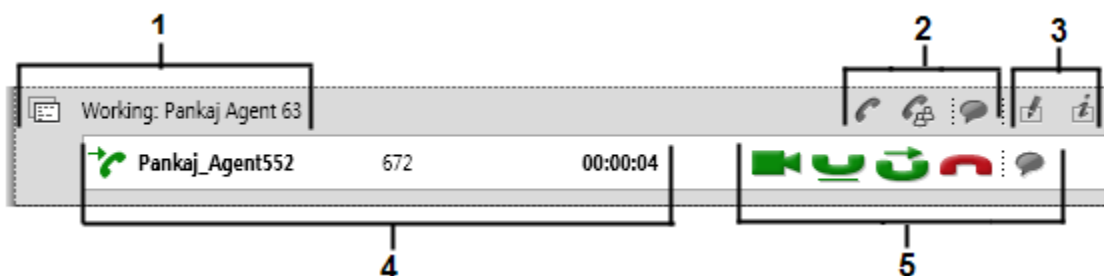
The Work List window consists of work items and control buttons corresponding to the work item. The controls and functionalities change depending on the work list window behavior. The



table below explains controls and icons that appear on the work list window during an active call.

The top right corner of the Work List window has work item controls. These controls are common to all work items in the Work List window. When a call arrives, the system notifies the corresponding call details in the work list window. When you accept the call, the control buttons appear for the associated work item.

The illustration below explains the Work List window and its elements.



1	<a href="#">Work item controls and functionalities</a> on page 17
2	<a href="#">Work Item controls</a> on page 18
3	<a href="#">View Work Item Information</a> on page 19
4	<a href="#">Media appearance states</a> on page 19
5	<a href="#">Media controls</a> on page 20

## Work item controls and functionalities




The work item menus and its corresponding icons appear on the top left corner of the Work List window. The controls and functionalities change depending on the Work List window behavior state. The table below explains controls and icons that appear on the Window List during an active call.

The Work List menu appears when you have a work item in the work list window. By default, the option is set to Manual-Accept. You can switch between these options as needed. The Work list menu provides the following controls:

Icon	Name	Description
	<b>Manual-Accept</b>	This icon indicates that you must manually accept the call to answer the call. For details, see <a href="#">Answering a call</a> on page 51.
	<b>Auto-Accept</b>	This icon indicates that the application accepts the call automatically when the

Icon	Name	Description
		system recognizes a call. For details, see <a href="#">Answering a call</a> on page 51.

The Work Item status icon appears when you have an active work item in the Work List window. Icons change dynamically depending on the work item state. For example, when you have an active work item, the alerting icon appears with the corresponding textual message. When you accept the call, the icon changes to work state dynamically. The following are the work item states that appear when you have an active work item in the Work List window:

Icon	Name	Description
	<b>Alerting</b>	This icon appears when the system recognizes an incoming work item. The icon remains in the alert state until you accept the call.
	<b>Working</b>	This icon appears when you accept an incoming call. The icon remains in the working state through the call.
	<b>Follow-up</b>	This icon appears when you release an active call and start the follow-up work for the work item. The icon remains in the follow-up state until you complete the follow-up work for the call.



**Related topics:**


[Changing the answer settings](#) on page 81

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## Work Item controls

The Work Item controls appear when you initiate a call or when the system recognizes an incoming call. The Work Item buttons appear on the top right corner of the Work List window, and are common to all work items in the Work List window. The following are the work item controls available during an active call:



Button	Name	Description
	<b>Add New Call</b>	This button allows you to talk to a contact in the list or a supervisor during a live call. This also adds another call to the current work item. For details, see <a href="#">Consulting the supervisor or an agent</a> .
	<b>Conference</b>	This button allows you to conference a contact or a supervisor to a live call. For details, see <a href="#">Making a conference call</a> on page 60.

Button	Name	Description
	<b>Add IM</b>	This button allows you to add an IM interaction to an active work item. You can select the IM user ID from your speed dial contacts, manually type the IM user ID, or select an ID from your contact list. For details, refer <a href="#">Starting IM interaction on a voice call</a> on page 74

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## View Work Item Information

You can view the details of a work item for an active call in the Work List window. The following are the work item controls available in the Work List window:





Button	Name	Description
	<b>Work Code</b>	This button appears during an active call. For details, see <a href="#">Assigning a work code</a> on page 84.
	<b>WorkItem Details</b>	This button appears for an active work item. For details, see <a href="#">Viewing the Work Item details</a> on page 83.





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## Media appearance states

Media appearance states appear when the client recognizes an incoming work item, or when you make a call. In addition to the call appearance status, you can see call-related information including call type, caller name, phone number, and call time and duration.

The following are the media states that appear in the Work List window at the beginning and during an active call:

Icon	Name	Description
	<b>Incoming Call</b>	This icon indicates an incoming call. The icon first flashes and remains in the answered state (Talking) when you accept the call.
	<b>Outgoing Call</b>	This icon indicates an outgoing call. The icon first flashes and remains in the answered state (Talking) where the called party answers the call.
	<b>Call Hold</b>	This icon indicates that the call is on hold.
	<b>Video Call</b>	This icon indicates a video session.







Icon	Name	Description
	<b>IM request</b>	This icon indicates an IM interaction.
	<b>TTY Call</b>	This icon indicates a TTY call.
	<b>Accept Desktop Share</b>	This icon indicates that you are requested to start a desktop sharing session with the caller. The icon is displayed as long as desktop sharing is in progress.
	<b>Service Observing</b>	Indicates a service observing session in progress on the supervisor desktop.










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## Media controls

Media controls appear when the system recognizes an incoming work item or when you make an outgoing call.

The following are the media controls that appear in the Work List window:

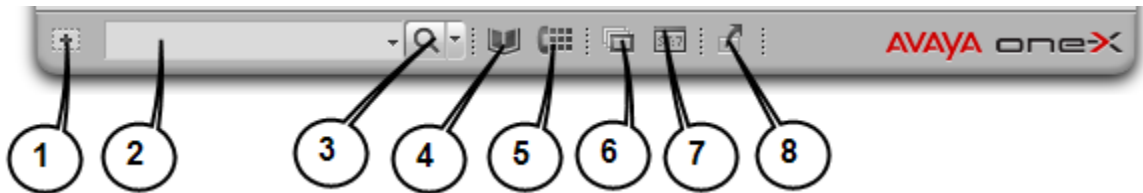
Button	Name	Description
	<b>Call Answer</b>	This button appears when a system recognizes an incoming call or when you put an active call on hold. For details, see <a href="#">Answering a call</a> on page 51.
	<b>Call Hold</b>	This button puts an active call on hold. For details, see <a href="#">Putting a call on hold</a> on page 58.
	<b>Call Transfer</b>	This button allows you to transfer an active call to any other contact. For details, see <a href="#">Transferring a call</a> on page 63.
	<b>Call End</b>	This button allows you to release an active voice call session. For details, see <a href="#">Ending a call</a> on page 67.
	<b>Video Call</b>	This button allows you to initiate a video call, if available. The video button appears only if the called party is using a video feature. For details, see <a href="#">Initiating a video call</a> on page 117.
	<b>Video Mute</b>	This toggle button appears in conjunction with the video call and allows you to mute or unmute the video session.

Button	Name	Description
		For details, see <a href="#">Muting or unmuting the video</a> on page 120.
	<b>Video End</b>	This button appears in conjunction with the video call and allows you to end the video session.
	<b>Initiate IM</b>	This icon appears when you receive an IM conversation invite. For details, see <a href="#">Managing Instant Messaging and Presence</a> on page 69.
	<b>End IM</b>	This button ends the IM conversation. This button appears when you receive an IM conversation invite. For details, see <a href="#">Ending an IM interaction</a> on page 75.
	<b>Initiate TTY</b>	Receives the incoming TTY call and opens the TTY window to begin the TTY interaction. For details, see <a href="#">Answering a TTY call</a> on page 79.
	<b>End TTY</b>	Ends TTY interaction. For details, see <a href="#">Ending a TTY call</a> on page 80.
	<b>Listen In</b> (toggles to <b>Barge In</b> )	Enables the Listen In feature and starts service observing for the supervisor. Listen In is always on initially when service observing is started. This is a toggle button and appears only for supervisor desktop. For details, see <a href="#">Observing agent service</a> on page 146.
	<b>Barge In</b> (toggles to <b>Listen In</b> )	Enables supervisor to enter a call under service observation and communicate with the agent and customer on that call. This is a toggle button and appears only for supervisor desktop. For details, see <a href="#">Barging into an agent call</a> on page 148.
	<b>Quick Alert</b>	Opens the Quick Alert window for a call under service observation session. Supervisor can send quick alerts using this feature. For details, see <a href="#">Sending a quick alert</a> on page 146.
	<b>Coach</b>	Starts a supervisor coaching session on a call under service observation. This opens an IM window for the supervisor to begin a coaching session for the agent, while the agent is still on the call. For details, see <a href="#">Coaching an agent</a> on page 147.

## Action bar

The action bar provides global controls such as creating a new work item, searching a contact, initiating a media element, and opening the secondary windows. The action bar stays at the bottom of the main window and remains at the bottom as the window expands.

The following illustration explains the action bar and its elements.



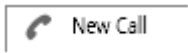



1	<a href="#">New Work menu</a> on page 22
2	Text Input field
3	<a href="#">Work Options menu</a> on page 23
4 through 8	<a href="#">Secondary windows</a> on page 24

## New Work menu

The New Work menu appears in the left side of the action bar.

**\* Note:**

When you select a media type from the New Work menu, the function button changes the menu to match the selected media type.

Menu	Name	Description
	<b>New Call</b>	This menu clears the <b>Text input field</b> to accept the number you want to dial. The <b>Work Options</b> icon changes to  .
	<b>New IM</b>	This menu clears the <b>Text input field</b> to accept the IM ID. The <b>Work Options</b> icon changes to  .






## Work Options menu

The **Work Options** menu is available in conjunction with the Text Input function menu. The **Work Options** menu performs multiple functions based on contexts such as searching a contact, initiating a call, conference, and transfer.

 **Note:**






As you type a character, characters matching the result dynamically appear in the Contact List window or the Contact Logs window based on your selection.

The following are the available in the **Work Options** menu:

Button	Name	Description
	<b>Search</b>	<p>The default state of the text input field is searching contacts from the Contacts window. You can view the following prompts in the Text Input field on a mouse rollover depending on the context:</p> <ul style="list-style-type: none"> <li>• <b>Search Contact:</b> Use this option when you are searching contacts in the Contacts window.</li> <li>• <b>Search Call Log:</b> Use this option when you are searching call logs in the Contact Logs window.</li> </ul> <p>For details, see <a href="#">Finding a contact</a> on page 96.</p>
	<b>Initiate Call</b>	<p>This button is available from the Work Option menu. Use this option when you want to make a new call. For details, see <a href="#">Making a call from the Text Input field</a> on page 53.</p>
	<b>Conference</b>	<p>This button allows you to initiate a conference. For details, see <a href="#">Making a conference call</a> on page 60.</p>
	<b>Initiate IM</b>	<p>This button initiates an IM interaction with valid IM ID provided in the adjacent <b>Text input field</b>.</p>
	<b>Transfer</b>	<p>The button allows you to transfer an active call to a supervisor or an agent in the contact list. For details, see <a href="#">Transferring a call</a> on page 63.</p>

## Secondary windows

Secondary windows are available as toggle buttons in the action bar. When you click a button for the first time, the corresponding window opens and when you click the button again the opened window closes. The following are the available secondary window buttons:

Button	Name	Description
	<b>Contact List</b>	Clicking this button opens the Contacts window below the Work List window. For details, see <a href="#">Managing the Contact List window</a> on page 91.
	<b>Dial Pad</b>	Clicking this button opens the dialpad window. For details, see <a href="#">Using Dialpad</a> .
	<b>Work Log</b>	Clicking this button opens the Contacts Log window below the work list window. For details, see <a href="#">Managing the Work Log window</a> on page 99.
	<b>VuStats</b>	Clicking this button opens the VuStats monitor window. For details, see <a href="#">Managing the VuStats Monitor window</a> on page 109.
	<b>Launch External Applications</b>	Clicking this button open a window applications if it has been administered in the Launch Application panel. For details, see <a href="#">Managing Launch Application</a> on page 105



# Chapter 3: Getting started

This section describes how to log on to Avaya one-X Agent Release 2.0. The procedure to log on depends on the configuration of Avaya one-X Agent deployed in your network and the type of authentication supported. The two types of authentication are described below.

## Basic authentication

In basic authentication, your user credentials get authenticated against the servers, namely Communication Manager, Central Management, and Presence Services, deployed in your network. In case of an authentication failure on Central Management or Presence Services, Avaya one-X Agent logs you on with the basic telephony features.

## Single sign-on

In this type of authentication, you can log on to your enterprise network and Avaya one-X Agent with the same user credentials. You do not need to provide separate user credentials to log on to Avaya one-X Agent.

In this section, you will learn how to launch the Avaya one-X Agent application on your personal computer, log in as an extension, and register as an agent.



### Important:

To enable Single Sign-on, Central Management and Presence Services must be configured for Avaya one-X Agent.

---

## Logging on to Avaya one-X Agent

You must register your station with Communication Manager to configure your system preferences, make and receive direct calls or to sign in as an agent. The system logs you in automatically if you have enabled automatic registration in the **System Settings** panel.

If you have Avaya IP Agent or Avaya IP Soft phone already installed, your login credentials, contact lists, and contact logs can be imported when you log in to Avaya one-X Agent for the first time. Avaya one-X Agent shows an Import Settings from IP Agent/IP Softphone dialog box when you log in for the first time. You can choose **Import Login Settings**, **Import Call History**, and **Import Contacts** on the dialog box. Avaya one-X Agent detects the database file and shows the path in the **Database File** field. Whatever you choose to import is displayed in the relevant windows on Avaya one-X Agent. However, make sure you have logged out of Avaya IP Agent or Avaya IP Soft phone while importing the relevant details.

Use the following steps to log on to Avaya one-X Agent. Before logging on to the application, obtain the following user credentials from your system administrator:

- User authentication ID and password
- Extension and password

- Agent Login ID and password
- IM user name and password

 **Note:**

- If Presence Services are not installed, IM user name and password are not required.
- For installations without Central Management, all the above credentials except User authentication ID and password are required.

- 
1. Launch Avaya one-X Agent on your personal computer. This displays the User Authentication window if you are not using Single sign on.
  2. Enter your ID and password on the User Authentication window. This step is not required if you are using Single sign on or if Central Management is not installed as a part of server installations and you will directly see the Welcome window after you launch Avaya one-X Agent.

The Welcome window may display a welcome message or an important instruction configured through Central Management, provided Central Management is installed as a server component.

You can complete the initial configuration using the Welcome window menu, when you launch Avaya one-X Agent on your personal computer for the first time. The initial task may include configuring your agent settings, defining your user profile, or setting the dialing rules. To configure the basic settings, see [Setting up the initial configuration](#) on page 29.

3. On the Welcome window, click **OK**. This displays the Login window.
  - If you have enabled automatic registration settings in the **System Settings** Login panel, the system logs you on to Avaya one-X Agent automatically.
  - If you have not enabled automatic registration settings in the **System Settings** Login panel, you need to enter your user credentials for each of the subsequent login windows.
  - If you have multiple user profiles, the system prompts you to choose an appropriate profile from the Profile window. You must choose a profile to proceed.
4. On the Login window:
  - a. In the **Extension** field, enter the telephone extension number.
  - b. In the **Password** field, enter the password.
  - c. Click **Log in**. This shows the Agent Sign In to ACD window.
5. To make and receive ACD calls, you must log on to the ACD server using the agent extension. On the Agent Sign In to ACD window:

- a. Enter the agent login ID in **Agent** field.
  - b. Enter the password in the **Password** field.
  - c. Click **Log in**. This shows the Connect to IM Server window. Connect to IM Server window is not displayed if Presence is not a part of your deployment. In such case you are directly logged on to Avaya one-X Agent after this step.
6. On the Connect to IM Server window:
- a. Enter your IM user name in **User Name** field.
  - b. Enter the password in the **Password** field.
  - c. Enter the IM server domain name in the **Domain** field.
  - d. Click **Log in**. This launches the application and logs you on to Avaya one-X Agent.

 **Note:**

The respective details appear as you log on to Avaya one-X Agent.

If you have logged into Avaya IP Soft Phone, a warning message is displayed. You need to log out to be able to import contact logs into Avaya one-X Agent.

---



# Chapter 4: Setting up the initial configuration

If you are an agent working from multiple locations and not an Avaya Central Management provisioned user (from the contact center, from your home, or from a different location), you must change your settings each time you change locations. This section describes how to configure various settings after logging in to Avaya one-X Agent.

 **Important:**

You may not have permission to change, add, delete, or configure some of the features in the application as these features may have been restricted at the enterprise level. These restricted features are visible, but grayed out.

---

## Configuring phones for different locations

You can perform day-to-day tasks from the contact center, at home, or while traveling by registering Avaya one-X Agent with Communication Manager.

You can select an appropriate configuration that optimizes the voice endpoints and network connectivity requirements of your current location. You need not change the configuration, as long as you do not access the contact center from any other location. However, if you work from multiple locations (from the contact center, from your home, or from a different location), you must configure Communication Manager IP on Avaya one-X Agent to connect to the correct Communication Manager each time that you change locations.

Avaya one-X Agent offers several options to register with the Communication Manager. Depending on your location, telephone set, and network, you can place and receive calls using:

- My Computer
- Desk Phone
- Another Phone

This section lists the minimum requirements and provides steps to set up each configuration. If you are not sure about the configuration type, contact your system administrator.

---

## Setting up the My Computer configuration

The My Computer configuration uses an IP connection to connect to Communication Manager for data path and VoIP for voice path. The configuration does not use an analog or an IP telephone, which, obviously, is valuable when a physical telephone is not available. You can

make or receive voice calls through Avaya one-X Agent using a headset connected to your personal computer.

The My Computer setting provides the best IP audio quality that is possible with your connection speed, personal computer performance, and network setup.

## Prerequisites

- Network connection from a personal computer running the Avaya one-X Agent application to Communication Manager.
- Network interface card for connectivity to Communication Manager and a sound card (full-duplex recommended).
- An USB-compliant headset connected to the personal computer (recommended), or a personal computer microphone and speakers, or a headset with a microphone connected to the mini connectors.
- Telephone extension number, password, and Communication Manager address.

---

Use the My Computer configuration when you are traveling and need to access Communication Manager through the Internet. You can configure the My Computer setting for VoIP either through the Login window or through the System Settings dialog box.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, **Login** panel is displayed by default with the **Telephony** tab.
  3. In the **Telephony** tab:
    - a. Select the **Enable automatic connection to CM** option if you want the system to connect to Communication Manager automatically using the last successful registration.
    - b. In the **Extension** field, specify the telephone extension number if you want Communication Manager to identify your telephone extension number each time you log in to the system.
    - c. In the **Password** field, specify the password for the associated telephone extension number.
    - d. Select **Save password during sign in** if you want the system to save the password when you are signing in with the associated extension number.
    - e. If the extension has been administered on Communication Manager to support Auto Answer, select the **CM Auto Answer Support Required** option.
    - f. In the **Server Address** field, enter the IP address of Communication Manager.
    - g. Select the appropriate **License Type**.

The **Basic** license supports only **Desk Phone** as the device to place and receive calls. Therefore, to set **Place and receive calls using** field as **My Computer**, make sure that your **License Type** selection is not set to **Basic**.

h. In the **Place and receive calls using** drop-down field, select **My Computer**.

4. Click **OK**.

The system applies the new changes in the next login.

---

#### Related topics:

[Telephony Login panel field descriptions](#) on page 161

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## Setting up the Desk Phone configuration

The Desk Phone configuration uses an Avaya IP/DCP telephone for voice path and an Avaya one-X Agent to share control of the same administered station using the same button layout and features. You access audio components from your office phone and visual components from your personal computer.

### Prerequisites

- Network connection from a personal computer running the Avaya one-X Agent application to Communication Manager.
- Avaya DCP or IP telephones capable of receiving calls from Communication Manager.
- Network interface card for connectivity to Communication Manager.
- Desk phone extension number, password, and Communication Manager server address.

Use the Desk Phone configuration when you are at the contact center and want to share the control between the office telephone and your personal computer. While registering as a Desk Phone with Communication Manager, you must register the desk phone number as the extension number. You can configure the Desk Phone setting either through the Login window or through the System Settings dialog box.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the **System Setting** dialog box, click **Login**.
  3. In the **Telephony** tab:
    - a. Select the **Enable automatic connection to Communication Manager** option if you want the system to connect to Communication Manager automatically using the last successful registration.
    - b. In the **Extension** field, specify the desktop extension number if you want Communication Manager to identify your telephone extension number each time you log in to the system.

- c. In the **Password** field, specify the password for the associated desktop extension number.
  - d. Select **Save password during sign in** if you want the system to save the password when you are signing in with the associated extension number.
  - e. If the extension has been administered on Communication Manager, select the **CM Auto Answer Support Required** option.
  - f. Select the appropriate **License Type**. If you select **Basic**, the **Place and receive calls using** field is set to **Desk Phone** and is disabled.  
The **Basic** license supports only **Desk Phone** as the device to place and receive calls. If you select **Basic** as the **License type**, the **Place and receive calls using** field is set to **Desk Phone** by default and is disabled.
  - g. In the **Place and receive calls using** drop-down field, choose **Desk Phone**.
4. Click **OK**.  
The system applies the new changes in the next login.

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**Related topics:**

[Telephony Login panel field descriptions](#) on page 161

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## Setting up the Other Phone configuration

The Another Phone configuration registers with Communication Manager as an off-site agent through a telephone and an IP connection. The telephone can be a PSTN telephone, a cellular telephone, or an extension on a local or remote switch. The Another Phone configuration uses an IP connection to connect to a Communication Manager and a PSTN connection to make or receive calls.

### Prerequisites

- Network connection from a desktop computer running Avaya one-X Agent to Communication Manager.
- Any telephone capable of receiving calls from Communication Manager.
- Communication Manager connection, one user connection for signaling connection and the other for off-site use, one trunk connection, or for on-site use, an additional user connection.
- Telephone extension number, password, and the Communication Manager server address.
- Telephone numbers to be configured as **Other Phone** must be added on the **Phone Numbers** panel. Refer [Adding a new phone number](#) on page 139 for information on adding phone numbers.

---

Use the Another Phone configuration when you are telecommuting and want to use Avaya one-X Agent from a remote location with a PSTN telephone connected to a Communication



Manager directly. You can configure the Other Phone setting either through the Login window or through the System Settings dialog box.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, click **Login**.
  3. In the **Telephony** tab:
    - a. Select the **Enable automatic connection to Communication Manager** option if you want the system to connect to Communication Manager automatically using the last successful registration.
    - b. In the **Extension** field, specify the telephone extension number if you want Communication Manager to identify your telephone extension number each time you log in to the system.
    - c. In the **Password** field, specify the password for the associated telephone extension number.
    - d. Select **Save password during sign in** if you want the system to save the password when you are signing in with the associated extension number.
    - e. If the extension has been administered on Communication Manager, select the **CM Auto Answer Support Required** option.
    - f. In the **Server Address** field, enter the IP address of Communication Manager.
    - g. Select the appropriate **License Type**.  
The **Basic** license supports only **Desk Phone** as the device to place and receive calls. Therefore, to set **Place and receive calls using** field as **Other Phone**, make sure that your **License Type** selection is not set to **Basic**.
    - h. In the **Place and receive calls using** drop-down field, select **Other Phone**.
    - i. In the **Telephone At** field, enter the telephone number you want to use for voice calls.  
If you are using a telephone number repeatedly, such as a home telephone number, you must add another number.
  4. click **OK** to save the settings.  
The system applies the new changes in the next login.

---

**Related topics:**

[Telephony Login panel field descriptions](#) on page 161

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## Configuring the agent settings

### Prerequisites

Obtain the agent extension number and password from your system administrator.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the Login Settings dialog box, click the **Agent** tab.
  3. In the **Agent** tab:
    - a. Select the **Automatically sign into the ACD server** to register the agent extension with the ACD server automatically with the previous successful registration through Communication Manager.
    - b. In the **Agent** field, specify the agent extension number if you want the ACD service to identify your agent extension number each time you log in to the system.
    - c. In the **Password** field, specify the password for the agent extension number.
    - d. Select **Save password during sign in** if you want the system to save the password when you are signing in as an agent with the associated agent extension number.
    - e. In the **Default Agent state upon ACD connection** drop-down field, choose the appropriate option.
  4. Click **OK**.

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### Related topics:

[Agent Login panel field descriptions](#) on page 163

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## Configuring IM settings

### Prerequisites

Obtain your IM user name and password, domain name, and IM server IP address from your supervisor or system administrator before you configure IM settings.

- 
1. On the top bar, click **System Options > System settings** .
  2. On System Settings dialog box, click **Login > IM** tab.

3. On **IM** tab, select **Enable IM Login** check box to enable instant messaging. Once you have selected this check box, you need to provide the user credentials required to log on to Avaya Presence Services.
  4. Select **Enable automatic connection to IM server** check box to if you want to automatically connect to IM server with the last successful registration. This step is optional.
  5. Enter the IM user ID, password, and domain name in **User Name**, **Password**, and **Domain** fields respectively.
  6. Select **Save password during sign in** check box if you want to save the credentials for subsequent log in.
  7. Enter the IM server IP address in **Server Address** field.
  8. Click **OK**.
- 

## Setting up the dialing rules

The dialing rules depend on the country and location of your Communication Manager. The dialing rules help the system to distinguish extensions from trunk calls, based on the length of the dialing string. It ensures that the system uses the right Automatic Route Selection (ARS) code, and if needed, modifies the digits in keeping with Communication Manager and the PSTN requirements.

Use dialing rules when you want the system to dial the correct digit sequence to register the settings with your Communication Manager.

### **Tip:**

For traveling agents visiting a different location and needing to register with a different Communication Manager, Avaya recommends defining a user profile with appropriate dialing rules for that location and using a login with the corresponding profile so that the dialing rules for the system do not change.

### **Note:**

You must change the dialing rules each time you register the telephone settings with a different Communication Manager.

Use the following steps if you are a travelling agent using Avaya one-X Agent from a different location, and want to register the settings with a different Communication Manager.

1. On the top bar, click **System Options > System Settings** .
2. In the System Settings dialog box, click **Dialing Rules**.
3. In the **Dialing Rules** panel:

- a. In the **Number to dial to access outside line** field, specify the number required to dial to access your outside line.  
You may have to dial '0' or '9' (or another number) to get an external line.
- b. In the **Your Country Code** field, specify the country code of your Communication Manager. For example, type 1 if you are accessing your Communication Manager from the United States.



**Note:**

In the context of the Communication Manager, the country code is called as the ARS access code.

- c. In the **Your Area/City Code** field, type the area or city code of your Communication Manager. For example, type 415 if you are accessing the Communication Manager located at San Francisco.
- d. In the **Number to dial for long distance calls** field, type the long distance prefix number of your Communication Manager.
- e. In the **Number to dial for international calls** field, type the international prefix.
- f. In the **Length for internal extension calls** field, type the length of the internal extension calls. For example, if your internal extensions consist of five digits, enter 5. If you specify the multiple extension lengths, Avaya one-X Agent performs the exact matches.  
When you assign the length of the internal extension number, Avaya one-X Agent treats the dialed number consisting of the selected number of digits as an internal extension.  
Your Communication Manager may have multiple length extension numbers, for example, if your company supports internal three-digit, five-digit, and seven-digit extensions, type 3, 5, 7. You must use a comma to separate the values.
- g. In the **Length of national phone numbers including City/Area code** field, type the length of the number for internal extension calls. This number should also include the code used to identify a city or an area.
- h. Select **Include area/city code when making a local call**, if area code should be prefixed with a number when making a local call. For example, if you dial a telephone number, the system prefixes the area code number defined in the **Your Area/City Code** field and dials the telephone number.
- i. Select **Display confirmation window before dialing a number**, for confirmation before dialing.

4. Click **OK** to save the settings.

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**Related topics:**

[Dialing Rules field descriptions](#) on page 179

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## Configuring the Work Handling options

### Prerequisites

To be able to specify **Aux Codes** during the **Transition to Ready state** interval, Aux. Codes must be defined prior to following this procedure.

Use the Work Handling options to configure the incoming work items, to use Communication Manager settings to change the agent status (if administered), to define the agent's transition state after releasing the call, and to set the work completion options.

1. On the top bar, click **System Options > System Settings** .
2. In the System Settings dialog box, click **Work Handling**. This displays the **Work Handling** panel with **Basic** and **Advanced** tabs.
3. On the **Basic** tab:
  - a. In the **Work Completion for ACD calls** section, define the work completion mode, as appropriate.
  - b. In the **Transitions to Ready State** section, define the agent's transition state after releasing the call.  
The **With Aux Code** option gets enabled if you select the **Manual-Ready** option.
4. On the **Advanced tab** tab:
  - a. In the **Work Items** section, select the appropriate option to accept incoming work items.  
**Auto-Accept** automatically accepts calls; however, this is not related to **CM Auto Answer Support Required** option on the Login window but provides the same functionality on the client side.
  - b. In the **Communication Manager Ready mode** section, select **Auto In** if you want Communication Manager to do the work handling, so that all work items get auto-completed. Selecting **Auto In** disables most Work Handling panel settings. If **Manual In** is selected, agent controls the work handling.
5. Click **OK** to save the settings.

---

### Related topics:

[Work Handling panel field descriptions](#) on page 165

---

## Configuring the incoming call appearance

Use the following steps to set the incoming call notifications to display the main window, or to flash the icon on the task bar when the system recognizes an incoming call.

- 
1. On the top bar, click **System Options > Agent Preferences** .
  2. In the Agent Preferences dialog box, click **Call Handling**.
  3. In the **Call Handling** panel, use any of the following options:
    - Select **Consultive Transfer** to consult the caller before transferring the call.
    - Select **Consultive Conference** to consult the second caller before adding the first caller to the conference.
    - Select **Auto-Hold** to automatically put the call on hold before transferring or conferencing the call.
    - Select **Bring main window to front** if you want the system to bring the main window to the foreground and activate the window for a ringing call.
    - Select **Flash icon** if you want to view the call flashing in the task bar when the system recognizes a ringing call.
  4. Click **OK** to save the settings.

---

### Related topics:

[Call Handling panel field descriptions](#) on page 156

---

## Configuring incoming instant message appearance

Use these settings to define how you want to be notified about an incoming instant message. You can also specify messages to be sent automatically as greetings when you begin IM interaction or as responses when receive to an instant message. The messages set using the this procedure are available through the **Add Response** button on the IM window.

- 
1. On the top bar, click **System Options > Agent Preferences** . This opens the Agent Preferences dialog box.
  2. On the Agent Preferences dialog box, select **Instant Messaging**. This displays the Instant Messaging panel with **General**, **Alerts**, and **Responses** tabs.
  3. On the **General** tab, enter your automated IM greetings in the **Greeting** field.

4. On the **Alerts** tab, select the following options:
    - a. Select the **Display main window** check box if you want the system to display main Avaya one-X Agent window on the foreground for an incoming message.
    - b. Select the **Display IM window** check box if you want the system to display the incoming message directly in an IM window.
    - c. Select the **Flash icon** check box if you want the system to flash the one-X Agent icon to flash on the task bar for an incoming message.
  5. On the **Responses** tab, set your automated IM response using the following steps. You can record multiple responses and use them anytime during your IM interaction.
    - a. Click the **+** (plus) button to add a response.
    - b. Select the response and add the text for you automated IM response.
    - c. Repeat steps a and b to add more IM responses.
    - d. To user the IM responses, click the **Add response** button on the IM window and select the IM response and press `Enter`.
  6. Click **OK** on the Instant Messaging panel to save your settings.
- 

---

## Configuring incoming TTY appearance

Use this procedure to define how an incoming TTY call must be displayed. You can also set an automated response to the incoming TTY message and specify numbers for which the TTY message window should be displayed.

1. On the top bar, click **System Options > Agent Preferences** . This opens the Agent Preferences dialog box.
2. On the Agent Preferences dialog box, select **TTY**. This displays the TTY panel with **General** and **Abbreviations** tabs.
3. On the **General** tab panel, perform the following steps:
  - a. Enter your agent greeting in the **Greeting** text box.
  - b. To display TTY window on every incoming voice call, select **Show TTY window on every voice call** check box.
  - c. To display TTY window for specific incoming voice calls, select **Show TTY window when a call comes from** check box and then specify the TTY numbers.
  - d. Perform this step if you have selected the **Show TTY window when a call comes from** check box. Click the **+** (plus) button. This adds a blank text item.

- e. Select the blank text item and type the number for which you want the TTY window to be displayed.
  - f. To display the TTY window for every voice work item on the work list window, select **Always show TTY button in Voice interaction**.
4. On the **Abbreviations** tab, perform the following steps:
- a. To view the preset TTY abbreviations, select any abbreviation in the list. The abbreviation details are displayed in the **Meaning**, **Literal Meaning**, and **Description** fields.
  - b. To add a new abbreviation, click the **+** button. This adds an untitled abbreviation to the list.
  - c. Select the untitled abbreviation and enter the abbreviation.
  - d. Enter a short explanation in the **Meaning** field.
  - e. Enter the expansion in the **Literal Meaning** field.
  - f. Use the **Description** field to add additional description or information on the abbreviation.
- The abbreviations are displayed in rectangular boxes on the TTY window. To view the abbreviation details, you must click the abbreviation box on the TTY window. The details are displayed in a popup box on the TTY window. The recipient can also view the same details if the same abbreviation and details are configured through the recipient's Avaya one-X Agent.
5. Click **OK** to save the settings.
- 

---

## Setting the audio options

Use the following steps to set the auto options to adjust the audio volume for playback, recording, and incoming calls. You can also set the system to play ring tone through the personal computer speaker and select a ringtone for an incoming call.

---

1. On the top bar, click **System Options > Agent Preferences** .
2. In the Agent Preferences dialog box, click **Audio**.  
This displays the **Audio** panel with **Basic** and **Advanced** tabs. The **Basic** tab is active by default.
3. On the **Basic** tab, perform the following steps in the **Volume** section to set the basic audio settings. The steps are optional and you can skip to the required step.



- a. Adjust the **Playback** slider to set the volume for all sound output through your computer speakers or headphones.
- b. Adjust the **Record** slider to set the recording volume of all sound transmitted through a microphone to your personal computer.
- c. Select the **Mute** check box adjacent to the **Record** slider to eliminate any sound being sent to your personal computer through the microphone.  
These settings will not affect the headset volume if the headset is attached to a telephone rather than the personal computer.
- d. Adjust the **Ringling** slider to set the volume of the sound played through your speakers or headset when you receive an incoming call.
- e. Select the **Mute** check box adjacent to **Ringling** slider to eliminate any sound that indicates an incoming call.
- f. Select **Play ringing through the internal PC speakers** to play the sound associated with an incoming call through the speakers of your personal computer and your headset simultaneously.  
If your personal computer does not have an internal speaker, this option has no effect.
- g. Select **Use Custom ringtone** to play the a custom ringtone (a Wave file) through the speaker or headset when you receive an incoming call. The wave file is played from the specified location.  
When you select **Use Custom ringtone**, a **Browse** field and **Test Ringtone** button are displayed below . Use the browse field to locate the wave file and click **Test Ringtone** to test the wave file.

Refer the *Audio Basic tab field descriptions* for more information.

4. On the **Advanced** tab, perform the following steps in the **Audio Devices** section to set the advanced audio settings:
  - a. Select the audio play back hardware on your local system from the **Playback Device** list.
  - b. Select the audio recording hardware on your local system from the **Record Device** list.
  - c. To be able to test the background noise, click **Background Noise Test**.  
This opens a Background Noise Test window. Click the **Test** button on that to test the background noise.

Refer the *Audio Advanced tab field descriptions* for more information.

5. Click **OK** to save the audio settings.

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**Related topics:**

[Audio Basic tab field descriptions](#) on page 151

[Audio Advanced tab field descriptions](#) on page 153

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## Defining an agent profile

Defining an agent profile from Avaya one-X Agent client interface is only possible for deployments without Central Management. With the given procedure, you can create a local agent profile.

A profile is a collection of pre-configured settings and preferences. Using profiles, agents can switch configurations (For example, agents can create profiles for different settings such as home, Office, Sales, Support and use them as needed) reusing the same Avaya one-X Agent installation. For example, you can create an agent profile for the My Computer configuration and use the profile with the appropriate VoIP network. You can also create another agent profile from the Desk Phone configuration and use it as appropriate.

- 
1. Make necessary changes using the System Settings and Agent Preferences options.
  2. On the top bar, click **System Options > System Settings** .
  3. In the System Settings dialog box, click **Profiles**.
  4. In the **Profiles** panel:
    - a. Click **Add**.  
The system displays the Create Profile dialog box.
    - b. In the **Profile Name** field, enter the name for the profile and click **OK**.  
The new profile appears in the Profile list.
  5. Click **OK**.  
The system creates a new profile and stores it locally in your personal computer. When you restart the application, the application resets the last used profile as the default profile, however allows you to choose the required profile from the list. This is provided you have created multiple profiles. If you have a solitary profile, you do not get to choose a profile at the launch of the application. You must select the appropriate profile to at the launch of Avaya one-X Agent on your personal computer.  
You can change the settings in the configuration parameters for the new profile in the next login.

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### Related topics:

[Profiles panel field descriptions](#) on page 182

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## Integrating the voice mail system

Avaya one-X Agent provides voice mail support for registered extensions in a voice mail system. You can integrate the voice mail system with a telephone system, a third party voice mail application, or a web-based voice mail server, and retrieve your voice mail from one of the voice mail services.

### **Important:**

The voice mail service is available only for those extensions registered with a voice mail system. If voice mail settings are not available on your extension, contact the system administrator.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the left pane of the System Settings dialog box, click **Voice mail Integration**.
  3. In the **Voice Mail Integration** panel, click **Enable Message Access**.
  4. To integrate voice mail service, perform one of the following actions as appropriate:
    - To integrate voice mail services with a telephone, select **Dial this number** and specify the voice mail number in the field.
    - To integrate voice mail services through a third-party voice mail application, select **Start this application** and click **Browse** to navigate a windows executable file.
    - To integrate voice mail with a third-party web server, select **Open on web** and type a valid web address in the field.
  5. Click **OK**.

---

### **Related topics:**

[Accessing your voice mails](#) on page 86

[Voice Mail Integration panel field descriptions](#) on page 176

[Voice Mail Integration panel field descriptions](#) on page 176

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## Activating a recorded greeting

You must activate the Record Greetings option for the system to play the greeting. You can have more than one active greeting at the same time.

For example, you can set multiple greetings to be active if each greeting has a unique Vector Directory Number (VDN) as the activation criterion. This is also true for Agent Greetings that play for specific Automatic Number Identification (ANI) telephone numbers or Prompted Digits.

If two recorded greetings meet the same criteria that make them eligible for a single call, Avaya one-X Agent chooses the first one on the search list.

### Prerequisites

You must have at least one greeting recorded to be able to activate a recorded greeting.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, select **Greetings Triggers**.  
The system displays the **Greetings Triggers** panel.
  3. In the **Greetings Triggers** list, select a greeting.
  4. Click **OK**.  
You can manually play the selected greeting on the incoming call.

---

### Related topics:

[Greetings Triggers panel field descriptions](#) on page 166

[Setting Greeting Triggers activation criteria](#) on page 127

[Recording an agent greeting](#) on page 125

[Record Greetings panel field descriptions](#) on page 157

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## Defining a reason code

Reason code is a way to associate a particular number to a label for an agent's reason for not being at the workstation or for not accepting an ACD call. These reason codes, if defined in Communication Manager, appear on the message window when an agent changes the work status to auxiliary or logs out from the ACD service. By default, the system creates a default reason code each for auxiliary, logout and work reason code types. You can change the default reason codes, but cannot delete them.

### Important:

The system administrator must define a common set of reason codes and manage it centrally. The administrator can distribute these reason code files to all agents by pushing the configuration to agent's system. Moreover, if your deployment is using Central Management, the administrator must upload a CSV file and universally assign common reason codes across the account or skill.

---

## Defining reason codes for work

Work codes are codes that you assign to a work item in the Work List window. You must define the work code to use them in the Work List window.

1. On the top bar, click **System Options > System Settings** .
2. In the left pane of the System Settings dialog box, click **Reason Codes**. This opens the Reason Codes panel on the right.
3. From the **Select menu to edit** list, select **Work Reason Codes**. A default and untitled reason code item is displayed under a **root** node in the container below **Select menu to edit** list.

You can add a singular work reason code or create a group and add a set of work reason codes in that group. Reason codes having similar or related characteristics are organized together in one group. Make sure that the labels given to the group are easy to understand the group activity.
4. To add a group, perform the following steps:
  - a. Click the **Add Reason Group** button at the bottom of the Reason Codes panel. This adds an untitled group node in the container below **Select menu to edit** list.
  - b. Select the untitled node and type the group name. The group node gets labeled with the name you type.
  - c. Follow step 5 to add reason codes to the group.
5. To add a solitary reason code, perform the following steps:
  - a. Select the node under which you want to add a reason code. This node may be the **root** node or a group node.
  - b. Click the **Add Reason Code** button. This adds an untitled reason code item under the selected node.
  - c. Select the untitled reason code item and rename it. The reason code name replaces the default name of the reason code item.
  - d. Repeat step 5 to add as many singular reason codes you want to.
6. Click **OK** to save your settings.

Work codes created using the above procedure are displayed when you click the **Work Code** icon on an active call on the Work List window. You can choose the appropriate code to assign during the active call. If you have not created any work code, the **Work Code** icon remains disabled during an active call.



**Note:**

If Central Management is used, reason codes can be defined only from Central Management. You will not be able to edit from Avaya one-X Agent application.

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**Related topics:**

[Reason Codes panel field descriptions](#) on page 177

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## Defining reason codes for logging out

The log out reason code describes the reason for logging out from the ACD service. You can use the log out reason code only if you have defined reason codes in the System Settings dialog box.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the left pane of the System Settings dialog box, click **Reason Codes**. This opens the Reason Codes panel on the right.
  3. From the **Select menu to edit** list, select **Log Out Reason Codes**. A default and untitled reason code item is displayed under a **root** node in the container below **Select menu to edit** list.  
You can add a singular log out reason code or create a group and add a set of log out reason codes in that group. Reason codes having similar or related characteristics are organized together in one group. Make sure that the labels given to the group are easy to understand the group activity.
  4. To add a group, perform the following steps:
    - a. Click the **Add Reason Group** button at the bottom of the **Reason Codes** panel. This adds an untitled group node in the container below **Select menu to edit** list.
    - b. Select the untitled node and type the group name. The group node gets labeled with the name you type.
    - c. Follow step 5 to add reason codes to the group.
  5. To add a solitary reason code, perform the following steps:
    - a. Select the node under which you want to add a reason code. This node may be the **root** node or a group node.
    - b. Click the **Add Reason Code** button. This adds an untitled reason code item under the selected node.

- c. Select the untitled reason code item and rename it. The reason code name replaces the default name of the reason code item.
  - d. Repeat step 5 to add as many singular reason codes you want to.
6. Click **OK** to save your settings.  
The system displays the newly created log out reason code in the **Log Out** list of the **Change Agent State** drop-down list.

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**Related topics:**

[Reason Codes panel field descriptions](#) on page 177

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## Defining reason codes for auxiliary

The auxiliary reason code describes the reason for changing your state to the AUX mode. You can use the auxiliary reason code only if you have defined the reason codes in the System Settings window.

Use the following steps to define the auxiliary reason codes and to associate them with the numeric reason codes supported in Communication Manager.

- 
1. On the top bar, click **System Options > System Settings**.
  2. In the left pane of the System Settings dialog box, click **Reason Codes**. This opens the Reason Codes panel on the right.
  3. From the **Select menu to edit** list, select **Aux Reason Codes**. A default and untitled reason code item is displayed under a **root** node in the container below **Select menu to edit** list.  
You can add a singular auxiliary reason code or create a group and add a set of auxiliary reason codes in that group. Reason codes having similar or related characteristics are organized together in one group. Make sure that the labels given to the group are easy to understand the group activity.
  4. To add a group, perform the following steps:
    - a. Click the **Add Reason Group** button at the bottom of the Reason Codes panel. This adds an untitled group node in the container below **Select menu to edit** list.
    - b. Select the untitled node and type the group name. The group node gets labeled with the name you type.
    - c. Follow step 5 to add reason codes to the group.
  5. To add a solitary reason code, perform the following steps:

- a. Select the node under which you want to add a reason code. This node may be the **root** node or a group node.
  - b. Click the **Add Reason Code** button. This adds an untitled reason code item under the selected node.
  - c. Select the untitled reason code item and rename it. The reason code name replaces the default name of the reason code item.
  - d. Repeat step 5 to add as many singular reason codes you want to.
6. Click **OK** to save your settings.  
The system displays the newly created auxiliary reason code in the **Auxiliary** list of the **Change Agent State** drop-down list.

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**Related topics:**

[Reason Codes panel field descriptions](#) on page 177

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## Viewing the phone display on the main window

Avaya one-X Agent allows you to view a 40-character display at the bottom of the Work List window from Communication Manager. You can view both call-related and non-call-related information including call-prompting digits, VuStats data, and the local date and time display from the ACD server.

 **Note:**

Only those telephone types that are capable of displaying 80 characters are compatible with this feature.

- 
1. On the top bar, click **System Options > Agent Preferences > User Interface**.
  2. In the User Interface panel enable the **Show Phone Display** option.
  3. Click **OK**.

---

**Related topics:**

[User Interface panel field descriptions](#) on page 158

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## Setting the toolbar buttons on the main window

Avaya one-X Agent allows you to set the toolbar buttons on the main window. These buttons provide quick-access to options including releasing a call, changing the answer settings to



manual or auto, changing the agent status to ready or auxiliary, making a call to the supervisor directly, assigning a work code to the work item, and dialing the last called number.

- 
1. On the top bar, click **System Options > Agent Preferences > User Interface** .
  2. In the User Interface panel:
    - a. Enable the **Display Button Toolbar** option.
    - b. Click **Select Favorite Buttons**.
    - c. In the Favorite Buttons dialog box, select the appropriate buttons.  
You can select up to eight buttons from the list.
  3. Click **OK**.
- 

**Related topics:**

[User Interface panel field descriptions](#) on page 158

Setting up the initial configuration

# Chapter 5: Handling phone calls

The way you want to handle phone calls depends on your phone settings. Each contact center environment is different, which can affect the way agents handle phone calls. For instance, the way you handle phone calls in the My Computer mode is different from when you handle phone calls in the Desk Phone mode.

 **Note:**

Avaya recommends that each contact center evaluate its configuration and instruct agents on the best practice to handle calls with Avaya one-X Agent.

This section explains the procedures to handle phone calls for different settings. You will explore how to answer calls, transfer calls, conference a call, put a caller on hold, mute a call, make calls, and end a call.

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## Answering a call

You can answer both ACD call and direct calls using Avaya one-X Agent. ACD calls occur when a customer dials a number associated with the contact center; the ACD server routes the dialed number to the agent extension number. Direct calls occur when you receive a call at the station extension number from extensions within the contact center or from outside the contact center through Communication Manager.

You can choose to answer both ACD calls and direct calls manually or automatically. The procedure to answer the call in a different mode is available below.

---

## Answering a call manually

Accepting a call manually is similar to lifting the telephone receiver whenever the telephone rings. In the context of Avaya one-X Agent, you must press the answer button on the application, or physically go-off hook (depending on your phone settings) when the system recognizes an incoming call.

### Prerequisites

- Work Item status is set as Manual-Accept.
- Signed in as an agent for ACD calls.
- Agent Status is set to Ready for ACD calls.

- A USB headset with microphone (For the My computer configuration).
  - A telephone handset (For the Desk Phone configuration).
- 

1. When the system recognizes an incoming call, the caller's information appears on the Work List window.

If the caller's information is present in the system, the system automatically retrieves the caller's details and displays the callers details in the Work List window or on the telephone display panel.

2. Answer the call by performing any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, click **Answer**.
- If you are using the Desk Phone configuration, go off-hook.
- If you are using the Another Phone configuration, click **Answer** or go off-hook.

Avaya one-X Agent creates a new work item in the Work List window.

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**Related topics:**

[Work Handling panel field descriptions](#) on page 165

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## Answering a call automatically

Answering a call automatically means you answer an incoming call on your extension without accepting the call. When the system recognizes a call, it provides a short beep indicating an incoming call. In Auto-Answer mode, you are mostly using a headset connected to your personal computer.

Avaya one-X Agent supports two types of auto answers, namely, Communication Manager administered Auto Answer where the extension has been administered in Communication Manager to answer the call automatically, and Avaya one-X Agent supported Auto-Answer where an agent can set the answer settings to auto answer.

### Prerequisites

- Work Item status is set as Auto-Accept.
  - Agent Status is set to Ready for ACD calls.
  - Signed in as an agent to accept ACD calls.
  - An USB headset with microphone (For the My computer configuration).
  - A telephone handset (For the Desk Phone configuration).
- 

1. When a call arrives, the telephone or the system rings (zip tone).

When the system recognizes an incoming call, the caller's information appears on the Work List window. If the caller's information is present in the system, the system automatically retrieves the caller's details and displays the details in the Work Item window or on the telephone display panel. If the system cannot find the contact, then the contact appears as `Unknown`.

2. Answer the call by performing any one of the following actions:
  - If you are using the My Computer configuration, in the Work List window, answer the call through the USB headset.
  - If you are using the Desk Phone configuration, use the telephone handset to answer the call.

 **Note:**

If you cut the call off or go on-hook accidentally, Communication Manager lets the telephone ring when it has a call to deliver. You must answer the call by picking up the telephone receiver.

Avaya one-X Agent creates a new work item in the Work List window. The work item will remain in the Work List window throughout the session.

3. Do not return the call to the on-hook state for the remainder of the shift.

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**Related topics:**

[Work Handling panel field descriptions](#) on page 165

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## Making a call

You can make calls to a customer outside the contact center or to contacts in the organization.

 **Note:**

Before making a call, ensure that you have set the dialing rules for Communication Manager. For steps, see [Setting up the dialing rules](#) on page 35.

You can make calls from the Contacts window, Contact Log window, Speed Dial list, Favorite lists, or by dialing a telephone number in the text input field.

---

## Making a call from the Text Input field

Use the Text Input field to make quick calls to a contact or a known telephone number.

1. On the action bar, click **New Work > New Call** .
2. In the **Text Entry** field, enter the contact name or a valid telephone number.

3. Click **Initiate Call** or press `Enter`.  
If you have enabled the **Display confirmation window before dialing a number** option in the Dialing Rules panel, the system displays the Call confirmation window. You make the changes as appropriate.
4. If you are making a call through a telephone, perform the above tasks and take the telephone receiver off the hook. Your telephone rings before the destination telephone answers and dials a call to the number specified in the field.  
The system dials a call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

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**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

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## Making a call from the Contact List window

Contacts List refers to an address book with individual contact details that you create and save in your personal computer.

1. On the action bar, click **Contact List**.  
The Contact List window displays a list of individual names with their available communication channels.
2. In the Contact List window, click **Click To call** for the associated contact.  
If the recipient has more than one telephone number, the system chooses the telephone number in the following order: work phone, mobile number, home phone, and video phone.
3. If you are making a call through a telephone, perform the above steps and go off-hook using the telephone receiver. Your telephone rings before the destination telephone answers and dials a call to the selected contact.  
The system places the call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

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**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

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## Making a call from the Work Log window

The Work Log window maintains records of recent incoming, outgoing, and missed calls. You can use these call logs to return or make a call.

- 
1. On the action bar, click **Work Log**.  
The Work Log window displays a list of recent calls with date, time, duration, and available communication channels.
  2. Scroll to the contact you want to call and click the **Click To call** icon for the associated work log. Alternatively, double-click on the contact log.  
If you have enabled the Enable the Display confirmation window before dialing a number option in the Dialing Rules panel, the system displays the Call confirmation window. You make the changes, as appropriate.
  3. If you are making a call through a telephone, perform the above tasks and go off-hook. Your phone rings before the destination telephone answers and dials a call to the selected work log.  
The system makes a call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

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**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

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## Making a call using the Speed Dial list

The Speed Dial feature provides a one-click access to frequently-used telephone numbers or contacts. The system saves these numbers as shortcuts in the Speed Dial list.

### Prerequisites

The contact to whom you want to make a Speed Dial call must be present in your **Speed Dial** list. Otherwise, the **Speed Dial** menu item would not appear while following the given steps.

---

Use the Speed Dial feature to initiate a call to your supervisor, to transfer a call, or to conference an active call.

- 
1. On an active call, perform any one of the following steps:
    - To consult a contact in the SpeedDial list, click **Add call to WorkItem > SpeedDial** and choose the telephone number.  
The system initiates a call to the contact in the SpeedDial list and creates an active work item in the Work List window. When the contact accepts the call, consult the contact as needed.
    - To conference a contact in the SpeedDial list, click **Conference > SpeedDial** and choose the telephone number.

The system initiates a call to the contact in the SpeedDial list and creates an active work item in the Work List window. When the contact accepts the call, add the contact to the conference based on the conference settings.

- To transfer a call to a contact in the SpeedDial list, click **Call Transfer > SpeedDial** and choose the telephone number.

The system initiates the call to the contact and creates an active work item in the Work List window. When the contact accepts the call, transfer the call based on call transfer settings.

2. Take appropriate actions as necessary and complete the work item.

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**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

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## Making a call to your supervisor

Use the following steps to initiate a call with your supervisor to seek opinion, to transfer a call, or to conference an active call.

- 
1. On an active call, use any one of the following options:

- To consult your supervisor, click **Add call to WorkItem > Supervisor** . The system initiates the call with your supervisor and creates an active work item in the Work List window.
- To conference the call with your supervisor, click **Conference > Supervisor** . The system initiates the call with your supervisor and creates an active work item in the Work List window. When supervisor accepts the call, add the supervisor to the call based on your conference settings.
- To transfer the call to your supervisor, click **Call Transfer > Supervisor** . The system initiates the call with your supervisor and creates an active work item in the Work List window. When your supervisor accepts the call, transfer the call based on your call transfer settings.

2. Take appropriate actions as necessary and complete the work item.

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**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

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## Making a call from the Dialpad window

You can use the Dialpad window in the same way that you would use the key pad on a telephone. For example, you can use the dialpad to respond to answer a call that you receive



from the other endpoint. You may consider using the Dialpad window while retrieving the voice mail from the voice mail box through a DTMF signaling.

 **Note:**

Avaya encourages using the main window to make or receive calls.

- 
1. On the action bar, click **Dialpad**.
  2. Expand the Dialpad window to see the full line appearance display.
  3. Perform any one of the following steps:
    - If you are using the My Computer configuration:
      - i. Select a free line appearance by clicking one of the lamps on the right.
 

The selected line appearance changes to green and you receive a service link call. You will get the speaker phone if you have not activated the headset.
      - ii. Click the on-screen number pad exactly as you do to enter the numbers on a telephone.
 

When you finish dialing, you hear an alert to let you know that the call has been placed. The display next to the button appears as a telephone set display.
      - iii. When you finish talking, click **Release** to terminate the call.

 **Note:**

At any stage during the call, you can move to the main window and use the standard media and work item controls as normal.

- If you are using the Desk Phone configuration:
  - i. Select a free line appearance by clicking one of the lamps on the right.
 

The selected line appearance changes to green and you receive a service link call. You will get the speaker phone if you have not activated the telephone headset.
  - ii. Wait for the dial tone and click the on-screen number pad exactly as you do to enter the numbers on a telephone.
 

When you finish dialing, you hear an alert to indicate that the call has been placed.
  - iii. When you finish talking, click **Release** to terminate the call.
- If you are using the Another Phone configuration, perform the following steps:

- i. Select a free line appearance by clicking one of the lamps on the right.

The selected line appearance changes to green and you will get a service link call for you to answer.

- ii. Wait for the dial tone and click the on-screen number pad exactly as you do to enter the numbers on a telephone.

When you finish dialing, you hear an alert to indicate that the call has been placed.

- iii. When you finish talking, click **Release** to terminate the call.

---

**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

---

## Putting a call on hold

The Call Hold feature puts an active call on hold. The call remains active even though you and the other party cannot hear one another. You can answer other calls while the active call is on hold. Depending on your system settings, you can put an active call either on manual hold or auto hold.

By default, Avaya one-X Agent puts an active call on hold automatically when you initiate a new call or reactivate a previously held call. The option to configure the call hold feature is available under the Call Handling panel in the Agent Preferences dialog box.

 **Important:**

Avaya recommends using auto-hold feature as the auto-hold feature works best in the real-time scenario.

 **Note:**

Avaya recommends that you avoid placing a conference call on hold as the system generates music or a beeping tone while the call is on hold

---

## Putting a call on hold manually

### Prerequisites

Disable the Auto-Hold option under the Call Handling panel in the Agent Preferences dialog box.

---

Use the manual hold option to put an active call on hold manually when you initiate a new call or reactivate the previously held call.

---

1. On an active call, perform any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, click **Hold**.
- If you are using the Desk Phone configuration, on the telephone set, press **Hold**.

The fast blinking LED next to the call line appearance button on the desk phone indicates that the active call is on hold.

If you attempt to perform any other tasks without putting the active call on hold, the system displays an error message. If you still attempt to perform any other task, the held call drops.

The system puts the active call on hold.

2. To return to the previously held call, perform any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, click **Unhold**.
- If you are using the Desk Phone configuration, on the telephone set, press **Unhold** when a single call is on hold, or press the corresponding call line appearance button when multiple calls are on hold.

You can switch between calls by clicking the **Unhold** button for the corresponding called parties.

---

### Related topics:

[Call Handling panel field descriptions](#) on page 156

---

## Putting a call on hold automatically

### Prerequisites

Enable the Auto-Hold option under the Call Handling panel in the Agent Preferences dialog box.

---

Use the auto hold option to put an active call on hold as required.

---

1. On an active call, perform any one of the following actions:

- If you are using the My Computer setting, in the Work List window, click any feature button. For example, click the **Consult** button.
- If you are using the Desk Phone setting, on the telephone set, press on any feature button. For example, press the **Transfer** button.

The fast blinking LED next to the call line appearance button on the desk phone indicates that the active call is on hold.

The system puts the active call on hold automatically.

2. To return to the previously held call, perform any one of the following actions:

- If you are using the My Computer setting, in the Work List window, click **Unhold**.
- If you are using the Desk Phone setting, on the telephone set, press **Unhold** when a single call is on hold, or press the corresponding **call/line** appearance button when multiple calls are on hold.

You can switch between calls by clicking the **Hold** button for the corresponding called parties.

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### Related topics:

[Call Handling panel field descriptions](#) on page 156

---

## Making a conference call

Conference calls allow several people to communicate simultaneously. During a conference call, you can exit the conference call to answer other calls and then return to the conference, or exit permanently while the other participants continue speaking. Avaya one-X Agent allows you to add up to five participants to a conference call.

 **Note:**

Before initiating a conference call, you must have at least one active call in the Work List window.

Avaya one-X Agent offers two types of conference calls:

- **Direct Conference:** You add participants to the conference call without speaking to them.
- **Consultative Conference:** You speak to participants before adding them in to the conference call.

Depending on the system settings, you can use Consultative Conference or Direct Conference. The option to configure conference call is available in **System Options > Agent Preferences > Call Handling**.

---

## Making a direct conference call

### Prerequisites

Disable the Consultative Conference option in **System Options > Agent Preferences > Call Handling**.

Use Direct Conference when you want to add participants to the conference without announcing the conference.

1. On an active call, perform any one of the following actions:
  - To conference the call with your supervisor, in the Work List window, click **Add WorkItem to Conference > Supervisor** . For steps, see [Making a call to your supervisor](#) on page 56.
  - To conference the call using the SpeedDial list, in the Work List window, click **Add WorkItem to Conference > SpeedDial** . For steps, see [Making a call using the Speed Dial list](#) on page 55.
  - To conference the call with an agent in the contact list, in the Work List window, click **Add WorkItem to Conference > Contact List** . For steps, see [Making a call from the Contact List window](#) on page 54.
  - To conference the call with an agent using the text input field, in the Work List window, click **Add WorkItem to Conference > EnterValue** . For steps, see [Making a call from the Text Input field](#) on page 53.

The system puts the first party's call on hold, dials a call to the selected third party, and when the third party answers the phone, the system adds the new call to the work item.

2. To add more participants to the conference, click **Add to Conference** and repeat step 1.

3. To control the conference hold options, perform any one of the following options:
  - To put the conference on hold, click **Hold Conference**.
  - To return to the conference on hold, click **Unhold Conference**.
4. To end the conference call, perform any one of the following steps:
  - To drop the last added participant from the conference call, click **Drop** for the associated participant.  
  
The conference returns to normal call.
  - To close the conference call, click **Drop** in the corresponding work item.

Depending on the Communication Manager settings, and on whether the conference participants are local extensions or trunk calls, dropping a conference may release some or all of the participants from the conference.

The system ends the conference call and releases all added participants from the call.

---

**Related topics:**

[Call Handling panel field descriptions](#) on page 156

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## Making a consultative conference call

### Prerequisites

Enable the Consultative Conference option in **System Options > Agent Preferences > Call Handling**.

Use Consultative Conference when you want to announce the call to the third party before conferencing the call.

 **Note:**

You cannot alternate between active calls in the work item during consultative calls. To overcome this limitation, you can create a new work item in the Work List window using the **Add Call** button and alternate between two active calls. If you want to conference the work item with another work item, drag the call and drop it into the held call work item.

- 
1. On an active call, perform any one of the following actions:
    - To conference the call with the supervisor, in the Work List window, click **Add WorkItem to Conference > Supervisor**. For steps, see [Making a call to your supervisor](#) on page 56.
    - To conference the call using the SpeedDial list, in the Work List window, click **Add WorkItem to Conference > SpeedDial**. For steps, see [Making a call using the Speed Dial list](#) on page 55.

- To conference the call with an agent in the contact list, in the Work List window, click **Add WorkItem to Conference > Contact List** . For steps, see [Making a call from the Contact List window](#) on page 54.
- To conference the call with an agent using the text input field, in the Work List window, click **Add WorkItem to Conference > EnterValue** . For steps, see [Making a call from the Text Input field](#) on page 53.

The system puts the first party's call on hold and dials a call to the selected third party.

2. Wait for the third party to pick up the phone and announce the conference call.  
The system adds the new call to the associated work item in the Work List window.
3. If the third-party is ready for the conference call, click **Consultative Conference**.  
The system creates a conference call for the associated work item.
4. To add more participants to the conference, click **Add to Conference** and repeat the above steps.
5. To control the call hold options, perform any one of the following steps:
  - To put the conference on hold, click **Hold Conference**.
  - To return to the conference on hold, click **Unhold Conference**.
6. To end the conference call, perform any one of the following steps:
  - To drop the last added participant from the conference call, click **Drop** for the associated participant.  
The conference returns to normal call.
  - To close the conference call, click **Drop** in the corresponding work item.

Depending on the Communication Manager settings, and on whether the conference participants are local extensions or trunk calls, dropping a conference may release some or all of the participants from the conference.

The system ends the conference call and releases all added participants from the call.

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#### Related topics:

[Call Handling panel field descriptions](#) on page 156

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## Transferring a call

You can transfer an ACD or a direct call to another caller in the contact center using the transfer button and dialing the required extension. Avaya one-X Agent offers two types of call transfer:

- **Direct Transfer:** You transfer an active call to a contact in the contact center without announcing the transfer.
- **Consultative Transfer:** You speak to the contact to whom the call is being transferred before transferring the call.

Depending on the system settings, you can use Direct Transfer or Consultative Transfer. The option to configure the call transfer settings is available in **System Options > Agent Preferences > Call Handling**.

---

## Making a direct transfer

### Prerequisites

Disable the Consultative Transfer option in **System Options > Agent Preferences > Call Handling**.

Use Direct Transfer to forward an impending call to the third party without announcing the call transfer.

---

On an active call, perform any one of the following actions:

- To transfer the call to your supervisor, in the Work List window, click **Transfer Call > Supervisor** . For steps, see [Making a call to your supervisor](#) on page 56.
- To transfer the call using the SpeedDial list, in the Work List window, click **Transfer Call > SpeedDial** . For steps, see [Making a call using the Speed Dial list](#) on page 55.
- To transfer the call to an agent in the contact list, in the Work List window, click **Transfer Call > Contact List** . For steps, see [Making a call from the Contact List window](#) on page 54.
- To transfer the call to an agent using the text input field, in the Work List window, click **Transfer Call > EnterValue** . For steps, see [Making a call from the Text Input field](#) on page 53.

The system transfers the active call to the selected contact directly. If you have set the work completion option to the Allow Follow-Up mode, the call moves the work item into the follow up state when the transfer is complete. For details, see [Completing the work](#) on page 84.

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### Related topics:

[Call Handling panel field descriptions](#) on page 156



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## Making a consultive transfer

### Prerequisites

Enable the Consultive Transfer option in **System Options > Agent Preferences > Call Handling**.

Use Consultive Transfer when you want to announce the call before transferring the call to the third-party.

 **Note:**

You cannot switch between two live calls during a consultive calls. To overcome this limitation, you can create a new work item in the Work List window using the Add Call button and switch between two active call. If you want to transfer the call to the caller in another work item, drag the call and drop it into the held call work item.

- 
1. On an active call, perform one of the following actions:
    - To transfer the call to the supervisor, in the Work List window, click **Transfer Call > Supervisor** . For steps, see [Making a call to your supervisor](#) on page 56.
    - To transfer the call to a contact in the SpeedDial list, in the Work List window, click **Transfer Call > SpeedDial** . For steps, see [Making a call using the Speed Dial list](#) on page 55.
    - To transfer the call to an agent in the contact list, in the Work List window, click **Transfer Call > Contact List** . For steps, see [Making a call from the Contact List window](#) on page 54.
    - To transfer the call to an agent using the text input field, in the Work List window, click **Transfer Call > EnterValue** . For steps, see [Making a call from the Text Input field](#) on page 53.

The system puts the first party's call on hold and dials and creates a new call in the associated work item.

2. 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 **Consultive Transfer**. The system transfers the call to the selected contact. If you have set the work completion option to the Allow Follow-Up mode, the call moves the work item into the follow up state when the transfer is complete. For details, see [Completing the work](#) on page 84.

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### Related topics:

[Call Handling panel field descriptions](#) on page 156

---

## Alternating between live calls

Avaya one-X Agent allows you to alternate between two live calls to carry out private conversation with each called party. You can use this function during consultive transfer and consultive conference.

Use the following steps when you have two live calls in the Work List window.

---

On two live calls, perform the following actions:

- To speak to the third party, in the first party's Work List window, click **Hold**
- To speak to the first party, in the third party's Work List window, click **Hold**.

You may continue to alternate between the first party and the third party call by clicking on the corresponding hold button. When you speak to one party, the other party's call is put on hold.

---

---

## Muting and unmuting your workstation

 **Note:**

The mute function is available only for the My Computer mode.

Use the mute function when you want to prevent other parties from listening to your conversation or to avoid the background noise during an active call.

---

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

- To mute the call, click **Mute**.

The Mute button changes to Unmute, and other listeners can no longer hear any background noise.

- To disengage mute, click **Unmute**.

The Unmute button changes to Mute, and the callers can hear you speaking.

---

---

## Ending a call

There are different methods to end a call. These methods work only if the Release feature has been administered for your station.

Use the following steps to end an active call or to drop the last called party added from a conference call.

---

When a call ends, perform any one of the following actions:

- If you are using the My Computer setting, click **End Call** for the associated call in the **Work List** window.
- If you are using the Desk Phone setting, hang-up the telephone.
- If you are using the Another Phone setting, click **End Call** or hang-up the telephone.

If you have put a call on hold, you must first reconnect to the call and then drop the call.

---

### Next steps

When you drop a call, you must wrap up the work item for the corresponding call. If you have set the work completion option to Allow Follow-Up or Auto-Follow-Up, the call changes the work item to the follow up state. For details, see [Completing the work](#) on page 84.



# Chapter 6: Managing Instant Messaging and Presence

Instant messaging and Presence are the new features added to Avaya one-X Agent in this release. Both these features are available provided Presence Services are installed as a part of server components in your network. Instant messaging (IM) allows agents to send instant messages using their Avaya one-X Agent client. Only agent-to-agent instant messaging (IM) is supported in this release.

Presence allows agents to know the availability of other agents. Agent state, voice channel state, and IM state are the three states for which the Presence status can be seen. After you have configured the IM settings, you simply need to add the IM address of your contact in your contact list to be able to view the contact's Presence status and use **Click to IM** to send messages.

## IM Features

- Agents can configure IM credentials before and after logging on to the application.
- Agent can communicate with each other using the IM communicator.
- Agent can subscribe to Agent state, Voice channel state, and IM channel state of other agents.
- Agent can choose to log off from IM, yet continue the telephony communication as agent.
- Agents can click to contact and click to IM agents in their contact list.
- Agents can also add IM work item to an active call from another agent present in their contact list.
- Agents can simply type the IM user ID in the **Text input field** to initiate an IM communication.
- All IM interactions are displayed in the same IM window. While replying to multiple IM responses, agents must first select the recipient from the IM window to whom the message needs to go.
- The standard features supported are Emoticons, http(s) links, and indicates if the other agent is composing a message.
- Agent also communicate with a user of Microsoft Office Communicator.

IM and Presence are optional and agents can only use these features if they choose to log into the Presence Server

This sections describes how to use IM and Presence features on Avaya one-X Agent.

### Related topics:

[IM window](#) on page 70

[Viewing presence status](#) on page 72

[Sending instant message from Text input field](#) on page 72

[Sending instant messages to contacts from your contact list](#) on page 73

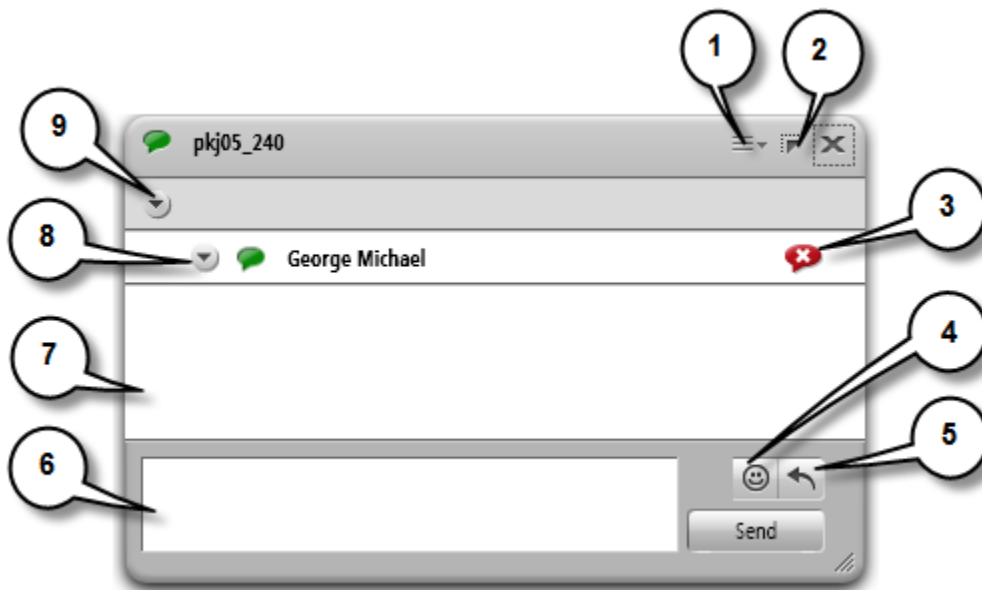
[Sending instant messages from the Work Log window](#) on page 74

[Starting IM interaction on a voice call](#) on page 74

[Ending an IM interaction](#) on page 75

## IM window

All IM interactions happen through the IM window. IM window is displayed whenever you initiate an IM interaction from the main application window. The following figure and the reference table help you understand the controls on the IM window.



No.	UI object	Description
1	<b>Options</b> menu	<p>The menu has the following menu items:</p> <ul style="list-style-type: none"> <li>• <b>IM Settings:</b> Opens the Agent Preferences dialog box displaying the Instant Messaging panel. Refer <a href="#">Configuring incoming instant message appearance</a> on page 38 to configure the message appearance.</li> <li>• <b>Help:</b> Opens the help for IM window.</li> </ul>

No.	UI object	Description
2	<b>Dock</b>	<p>Docks the IM window to the application window. You have the following docking options:</p> <ul style="list-style-type: none"> <li>• <b>Left</b></li> <li>• <b>Top</b></li> <li>• <b>Right</b></li> <li>• <b>Bottom</b></li> </ul> <p>Once docked, the name changes to <b>UnDock</b>.</p>
3	<b>End IM</b>	Ends the corresponding IM interaction.
4	<b>Emoticons</b>	<p>Invokes a list of emoticons. You can select one or more emoticons to use in your IM interaction. The following expressions can be sent:</p> <ul style="list-style-type: none"> <li>• Smile</li> <li>• Wink</li> <li>• Laugh</li> <li>• Frown</li> <li>• Angry</li> <li>• Stick out tongue</li> <li>• Confused</li> <li>• Sick</li> <li>• Ambivalent</li> </ul>
5	<b>Add Response</b>	<p>Displays a list of automated responses that you can add to your IM interaction. Refer <a href="#">Configuring incoming instant message appearance</a> on page 38 to add automated responses.</p>
6	<b>Message entry box</b>	Allows you to enter the IM interaction text.
7	<b>IM Interaction box</b>	Displays the incoming and out going messages.
8	<b>Close Additional Information</b>	<p>Collapses and hides the corresponding IM interaction text under the IM contact ID. In case there is an incoming message, the IM icon adjacent to the contact ID blinks to alert you about the message.</p>
9	<b>Close Additional Information</b>	Collapses all IM interactions under the current work item.

## Viewing presence status

### Prerequisites

The following prerequisites must be fulfilled to be able to view the presence status of other agents and Microsoft Office Communicator users:




1. Presence server must be one of the server components in your deployments.
2. The agent whose Presence status is to be viewed must be a member of your contact list and must have an IM address.
3. You must be logged on to the Presence server.

Presence status can be viewed from the Contacts List window.

1. On the action bar, click **Contact List**. The Contacts window is displayed.
2. View the extreme left column to know the agent status of your contact. Refer [Agent status and system messages](#) on page 12 for information on agent status.
3. View the extreme right column to know the voice and IM channel status of your contact.

### Example

Some of the common voice and channel states are described in the following table:

Channel	Available	Busy	Information not available
Voice			
IM			

## Sending instant message from Text input field



## Prerequisites

To send instant message directly from the **Text input** field, you must know the IM user ID and the domain name of the recipient.

---

1. On the Action bar, select **New Work > New IM** menu. The **Work Options** icon changes to the IM icon.
  2. Type the recipient's IM user ID and domain in the following manner:  
<IM user ID>@<Domain name>
  3. Press Enter or click the IM icon adjacent to the **Text input** field. If there is no IM window already open, the systems displays your message in a new IM window. Simultaneously, an IM work item is created and is displayed in the Work List window. For subsequent communication, you can directly type your text in the IM window.
- 

---

# Sending instant messages to contacts from your contact list

## Prerequisites

The IM contact you wish to communicate with must be present in your contact list with a valid IM address and must have logged on to the presence server. This condition is also applicable for Microsoft Office Communicator (MOC) contacts.

---

You can use the same procedure to communicate with an MOC user. The MOC user will send and receive messages from the MOC interface.

---

1. Click **Contacts** icon on the Action bar. This displays the Contacts window below the Action bar.
  2. Click the **Click to IM** icon against the recipient's name. This will open a new IM window.
  3. Type your message in the **IM text box** on the IM window and click **Send** to send message to the recipient. Simultaneously, a new IM work item is created and displayed in the Work List window of the application.  
If you initiate more than one IM interactions, the new IM recipients get added to the same IM window. You need to choose the right recipient in the IM window to send the IM message.
-

---

## Sending instant messages from the Work Log window

### Prerequisites

The IM contact you wish to communicate with must be present in your contact list and must have logged on to the presence server.

- 
1. Click **Work Log** icon on the Action bar. This displays the Work Log window below the Action bar.
  2. Select the appropriate work log from using the **Show** and **View** lists.
  3. Click the **Click to IM** icon against the recipient's name. This will open a new IM window.
  4. Type your message in the **IM text box** on the IM window and click **Send** to send message to the recipient. Simultaneously, a new IM work item is created and displayed in the Work List window of the application.

If you initiate more than one IM interactions, the new IM recipients get added to the same IM window. You need to choose the right recipient in the IM window to send the IM message.

---

---

## Starting IM interaction on a voice call

### Prerequisites

To initiate an IM interaction on a voice call, the caller must be a member of your contact list, must have an IM user ID, and must have logged on to the Presence services.

---

You can initiate an IM interaction with an incoming voice call. If the caller satisfies all the prerequisites for an IM interaction, the **Add IM to work item** icon appears enabled for the incoming call.

- 
1. Click **Add IM to work item** icon from the work item controls of the call for which you want to start an IM interaction.
  2. The system initiates an IM interaction with the caller in a new IM window.
  3. Enter your messages in the IM window text box and click **Send**.
-

---

## Ending an IM interaction

You can end individual or all IM interactions.

---

Click the **End IM** icon to end your IM interaction.

If you click **End IM** in the IM window, it will end the relevant IM interaction. However, if you click **End IM** icon in the work space, it will close all the IM interactions displayed in the IM window.

---



# Chapter 7: Handling TTY calls

Handling Tele Type (TTY ) calls is a new feature of Avaya one-X Agent. TTY calls are calls initiated by callers having hearing or speech impairment. Callers make TTY calls using a TTY phone or device. These calls are received as a normal voice call work item. However, Communication Manager recognizes the TTY call signal and prompts to initiate a TTY interaction by displaying a TTY-specific icon.

The TTY interaction is addressed in a window similar to the IM window. Agents can interact with TTY callers using a set of abbreviations available on the TTY interaction window. The text messages between the caller and the Agent are broken when either the agent or the caller types “GA” — an abbreviation for Go Ahead. GA signifies end of a statement and that the other party can provide a response.

Avaya one-X Agent also supports a parallel video call with TTY callers, provided both agent and the caller have the necessary hardware. The video response is handled as a normal video call and is displayed in a separate media window in parallel with the TTY text interaction window.

## Related topics:

[TTY window](#) on page 77

[Answering a TTY call](#) on page 79

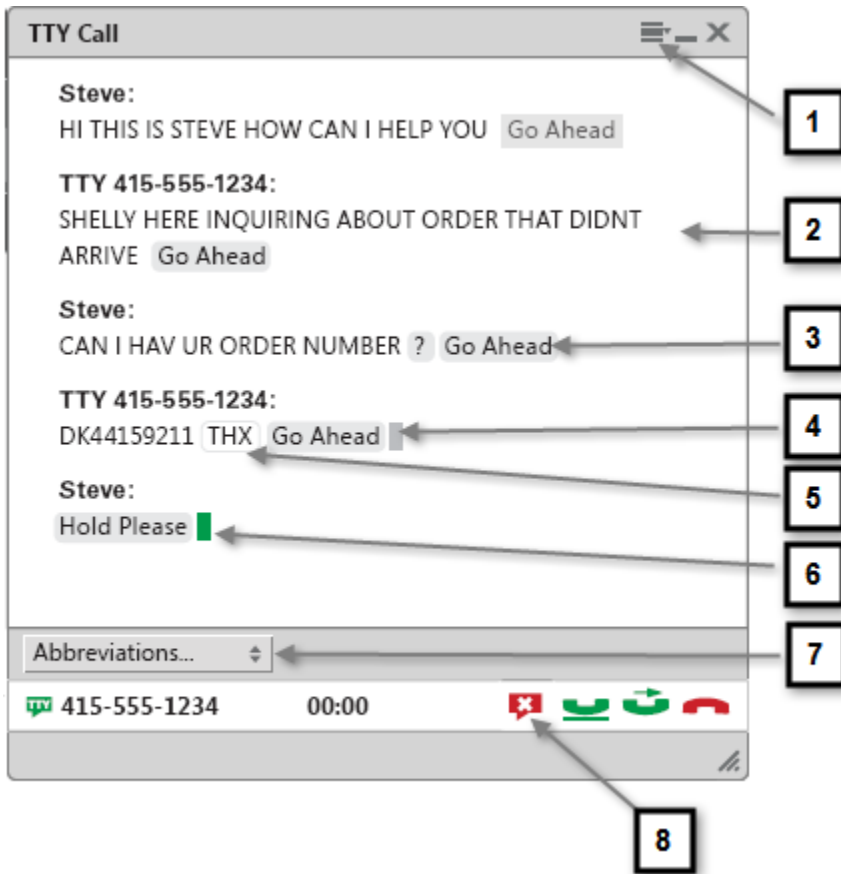
[Using abbreviations in TTY calls](#) on page 79

[Ending a TTY call](#) on page 80

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## TTY window

TTY window is an extension of the IM window. TTY window is displayed only after you accept the TTY call. The following figure and the reference table help you understand the controls on the TTY window.



No.	UI object	Description
1	Dock	Docks the TTY window to the main application window. The docking options available are: <ul style="list-style-type: none"> <li>• Left</li> <li>• Top</li> <li>• Right</li> <li>• Bottom</li> </ul> Once the window is docked, the menu label changes to <b>UnDock</b> .
2	Message area	Contains and displays the TTY interaction.
3	Expansion for GA	Marks end of the preceding message string so that the other person on the call can type a response.
4	Callers cursor	Displays a gray cursor against the callers text.
5	Recognized abbreviation	TTY users use number of abbreviations to ease their communication and also expect.
6	Agent's cursor	Displays a green cursor for your messages.

No.	UI object	Description
7	Abbreviations Menu	Invokes a TTY abbreviation list.
8	End TTY	Ends the TTY interaction.

**Related topics:**

[Using abbreviations in TTY calls](#) on page 79

[Answering a TTY call](#) on page 79

---

## Answering a TTY call

The TTY call appears as a regular telephone call on the work list window. Therefore, the incoming call alert displays a voice call icon. However, Avaya one-X Agent recognizes the call as TTY call from the call signal and displays an **Initiate TTY** button in the work list window. A blank TTY window also opens with the incoming call.

1. Click the **Initiate TTY** button on the work list window. 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). This would indicate to the TTY caller to start typing the message.

 **Note:**

You can put a TTY call on hold just as you do for a telephony call. However, to end the call, you must click the **End TTY** button.

**Related topics:**

[Using abbreviations in TTY calls](#) on page 79

[TTY window](#) on page 77

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## Using abbreviations in TTY calls

TTY callers use TTY abbreviations for ease of communication and efficiency in sending messages. You can insert abbreviations either from the **Abbreviations** menu on the TTY window or directly invoke an abbreviations list at your cursor.

1. To insert abbreviations in your message from the **Abbreviations** menu:

- a. Place your cursor where you want to insert the abbreviations.
  - b. Click the **Abbreviations** menu. This invokes the abbreviations list. The list contains TTY abbreviations along with their expanded forms.
  - c. Select the abbreviation you want to insert from the list. The abbreviation gets inserted at your cursor location.
2. To invoke the abbreviation list at your cursor location:
- a. Double-click the ~ (tilde) key on your keyboard. This shows an abbreviations list adjacent to your cursor.
  - b. Type the letters of your abbreviation in the abbreviation list. The list gets filtered based on the text you enter.
  - c. Select the abbreviation on the list and it gets inserted at your cursor location.
- Make sure you enter the GA abbreviation to terminate your message string.

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**Related topics:**

[Answering a TTY call](#) on page 79

[TTY window](#) on page 77

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## Ending a TTY call

### Prerequisites

A TTY call must be in progress.

---

Click **End TTY** on the work list window or the TTY window. The TTY call gets terminated and the TTY window gets closed.

---



# Chapter 8: Performing common tasks

This chapter explains the common tasks that you perform using Avaya one-X Agent.

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## Changing the answer settings

You can choose to answer an incoming call manually or automatically. When you choose the answer setting to Manual-Accept, you must select the Answer button or go off hook to answer an incoming call. When you choose the answer setting to Auto-Accept, the system automatically accepts the call as soon as the call arrives to your extension.

 **Note:**

The Auto-Accept setting requires you to be in off-hook mode all the time. You must ensure that you are using a headset if you are using the My computer configuration before you change the answer setting to Auto-Accept. If you are using the Desk Phone or Another Telephone configuration you must ensure that your telephone is in the off-hook state.

---

Perform any one of the following actions:

- 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** .

The option to change the default answer setting is available in the **Work Handling** panel.

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**Related topics:**

[Work item controls and functionalities](#) on page 17

---

## Changing the agent work status

You can set the agent status to Ready or Auxiliary modes. The Ready state indicates that you are available for ACD calls and the Auxiliary state indicates that you are not available for ACD calls.

 **Important:**

Always refer to the agent status (on the top bar) to monitor your work status so that you are available for ACD calls. The ACD server routes calls to your extensions only if you have set the agent status to Ready and closed all work item to get a new ACD call. If you have set the agent status to Auxiliary, or Logged Out modes, the ACD server will not send any ACD calls to your extension until you change your status back to Ready.

You can control your status and your availability for accepting ACD calls. For example, if you want to leave your station for lunch or if you need time after a recently concluded call, you can make yourself temporarily unavailable for the new ACD calls.

 **Note:**

If you attempt to change the agent status to Logout or AUX mode during an active call, the system prompts you to complete the work item before changing the agent status as required.

---

Perform any one of the following actions:

- If you want to accept ACD calls, on the top bar, click **Agent Status > Ready** .

The system changes the agent work status to Ready on the status bar indicating that you are ready to accept ACD calls.

- If you do not want to take ACD calls, on the top bar, click **Agent Status > Auxiliary** and choose the appropriate reason code from the list, if available.

The system changes your agent work status to Auxiliary with the associated reason code with the current state on the status bar indicating that you are not ready for ACD calls. If you change your agent state while on a call, your state will change only after you release the call.

- If you want to logout from the ACD service, on the top bar, click **Agent Status > Log Out** and choose appropriate reason code from the list, if available.

The system logs you out from the ACD service and changes the agent work status to log out with the associated reason code on the status bar indicating that you have signed out from the ACD service.

The option to configure the default agent status to Auto-Ready or Manual-Ready is available in the **Work Handling** panel.

---

**Related topics:**

[Work Handling panel field descriptions](#) on page 165

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## Playing recorded greetings manually

Recorded greetings are useful in environments where you often play a standard disclaimer statement or when you play a recording at any subsequent time to answering a call. You can

choose to play an agent greeting recording to a caller who makes an ACD call, before the caller begins speaking with you. An example of an agent greeting playback is: Hello, my name is Allen Smith. How can I assist you?"

You can also customize to play agent greetings by setting up the greeting triggers. To enable recorded greeting triggers, see [Managing Agent Greetings](#).

### Prerequisites

At least one agent greeting recording is enabled in **System Options > System Settings > Agent Preferences > Record Greetings** .

- 
1. When the system recognizes an incoming call, click **Accept**.
  2. On the top bar, click **Play Greetings** and select an agent greeting for the incoming call.

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

---

### Related topics:

[Recording an agent greeting](#) on page 125

---

## Viewing the Work Item details

You can view details corresponding to a work item in the Work List window. By looking at the work item details, you will be able to view the digits that a caller entered during an IVR interaction, User-to-User Information (UUI), and work codes for the associated call.

- 
1. On an active call, in the Work List window, click **WorkItem Details**.

The Work List window expands with the following data (if available) for the corresponding work item:

- **Prompted Digits:** Prompted digits corresponds to a sequence of number a caller enters in response to automated questions when the call passes through an IVR system.
- **User to User Info:** User-to-User Information refers to an unique identifier that an external application (such as Avaya ASAI) adds to an incoming call to recognize the call type.
- **Work Codes:** Work Codes differentiates the call type for each work item. For example, a follow up call to a customer appears as '13: Follow-up' and a cold call to a customer appears as '11: Cold Call'.

2. To close the work item details panel, click **WorkItem Details** again.

---

**Related topics:**

[Work Handling panel field descriptions](#) on page 165

---

## Assigning a work code

Work Code varies from each organization and is usually defined by administrators. Each work code differentiates the call type for each work item, for example, you can tag a follow up call as '13: Follow-up' and a cold call to a customer as '11: Cold Call'.

- 
1. On an active call, in the Work List window, click **Add Code**.  
The system displays the Work Code window with the corresponding work codes.
  2. From the Work Code window, select an appropriate work code.  
You can associate multiple work codes to a single work item.

---

**Related topics:**

[Reason Codes panel field descriptions](#) on page 177

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## Completing the work

Avaya one-X Agent provides you the option to wrap up the work after finishing a call. You must set the work status to Follow Up Work mode to complete different tasks after the caller terminates the call. When a work Item is in Follow Up mode, to Communication Manager you as

the agent are in After Call Work and it will not send any more ACD calls to your station, unless you have been administered with Multiple Call Handling

The Follow Up Work mode timers starts (if timed follow up is selected) the pre-defined countdown timer allowing you to complete the task for the associated work item only if the timed follow-up is set. When the wrap-up time reaches its limit, the work item closes and changes the agent status accordingly. If you finish the task before the countdown timer, you must click the Work Completion button for the associated work item in the Work List window.

Depending on your work preference, you can set the work mode to Auto-Complete or Follow-Up modes. The Follow Up Work mode option is available only for ACD calls. The option to configure these settings are available in the Work Handling panel of the System Settings. For details, see [Configuring the Work Handling options](#) on page 37.

## Prerequisites

- The Work Completion status is set as Allow Follow-up in the Agent Preferences dialog box.
- For extended follow-up, the Work Completion status is set to Allow extending follow-up in the Agent Preferences dialog box.

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

You can select **Auto-Complete** if you do not have any further task for the associated work item and want the system to return to the original state immediately when the contact hangs the phone.

2. Wait for the contact to hang up the phone.  
The system starts the follow-up timer for the associated work time.
3. Complete the task for the associated work item.  
The system returns to the original state when the follow-up timer expires. If you finish the task before the timer expires, click **Complete WorkItem**.
4. If you require more time to complete the task:
  - a. Click **Complete Follow-up > Request More time** .
  - b. After completing the work item, click **Complete Work Item**.

The system returns to the original state.

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## Related topics:

[Work Handling panel field descriptions](#) on page 165

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## Monitoring the audio quality and VoIP traffic

System administrators use the Audio Monitor dialog box to troubleshoot voice quality issues.

Use the Audio Monitor dialog box to determine the audio quality if the quality of your VoIP communications degrades.

- 
1. On the action bar, click **Audio Monitor**.  
The system displays the status of audio quality of volume and VoIP traffic information for the corresponding voice call.
  2. During an active call, if you do not want Avaya one-X Agent to transmit audio when you are not speaking, enable **Silence suppression enabled**.
- 

### Related topics:

[Audio Monitor dialog box field descriptions](#) on page 182

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## Accessing your voice mails

Avaya one-X Agent provides option for agents to listen to voice messages. These voice messages are linked to the voice mail system. Whenever a new voice message arrives on your extension, the system changes the voice mail indicator to green with a mail icon appearing on the top left-hand corner of the top bar.

### Note:

Voice mail service is available only for registered extensions registered with a voice mail system. If you do not have the voice mail settings on your extension, contact the system administrator. For steps, see [Integrating the voice mail system](#) on page 43.

### Prerequisites

- Voice Mail retrieval number
  - Mailbox ID
  - Initial PIN number
- 

Use the following steps to retrieve your voice mail from the voice mail system.

---

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

The Voice Mail Indicator also functions as a button to access voice messages even without any active messages on a mouse rollover.

2. Click **Unread Message** and perform one of the following steps:
  - If you have integrated the voice message system with the telephone, the system dials the voice message number and upon connecting to the voice mail service, you will hear voice prompts. Listen to the voice prompts and follow the instructions using the dialpad.
  - If you have integrated the voice message with a third-party voice message application, the system starts the third-party voice message. Access the voice mail application using the user credentials. For the procedure, refer to the user documents shipped with the voice mail application.
  - If you have integrated the voice message with a web application, the system opens the corresponding web site. Follow the on-screen instruction to access the voice mail.

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**Related topics:**

[Integrating the voice mail system](#) on page 43

[Voice Mail Integration panel field descriptions](#) on page 176

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## Launching an external application

To use Launch Application, you must configure the launch items in the Launch Application panel in the System Settings. To configure the menu, see [Managing Launch Application](#) on page 105.

---

On the action bar, click **Launch External Applications > <Launch item>**.  
The system displays the launch application on your computer screen.

---

**Related topics:**

[Managing Launch Application](#) on page 105

---

## Viewing the VuStats Monitor window

The VuStats Monitor window opens as a separate floating window.

## Prerequisites

The VuStats feature is assigned to one or more buttons for this extension. For details, see [Configuring an extension for VuStats](#) on page 109.

- 
1. On the action bar, click **VuStats Monitor**.  
The VuStats window displays the VuStats information sets. You can choose to view a particular set of VuStats information.
  2. To view a particular set of VuStats information, on the VuStats Monitor window, click **Options** and select the VuStats information you wish to see in the VuStats Monitor window.  
The corresponding VuStats information appears on the VuStats Monitor window. To adjust the refresh rate and display interval, see [VuStats panel field descriptions](#) on page 168.



### Note:

Communication Manager output for each VuStats button in the VuStats monitor window takes one line of the monitor window.

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### Related topics:

[Managing the VuStats Monitor window](#) on page 109

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## Using the Click-to-Dial feature

The Click-to-Dial feature allows you to use your mouse to automatically dial properly-formatted telephone numbers that appear in Web pages. This feature only functions with Web pages displayed in Microsoft Internet Explorer or Mozilla Firefox.

### Prerequisites

- Ensure that the Click-to-Dial program has been enabled at the time of installation.
- If you are using Internet Explorer on your personal computer, ensure that the Enable Click to Dial in Internet Explorer option has been enabled in **System Options > System Settings > Desktop Integration** .
- If you are using Mozilla Firefox on your personal computer, ensure that the Enable Click to Dial in Mozilla Firefox option has been enabled in **System Options > System Settings > Desktop Integration** .

- 
1. Open a Web page using a Web browser that contains a telephone number that you want to call.



The Web browser opens the specified Web page and any properly-formatted telephone numbers are yellow-highlighted.

2. Move your mouse cursor over one of the highlighted telephone numbers.  
If the Web page is an unsecured site, the cursor will change to a telephone with a red A. For secured sites, the cursor will change to a hand with an extended index finger.
3. Click the highlighted telephone number.  
The system automatically dials the selected telephone number from the Web page.

---

**Related topics:**

[Desktop Integration panel field descriptions](#) on page 175

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## Signing out as an agent

You can sign out as an agent from the ACD service when you finish the work for the session. However, you will be able to handle direct calls from agents in the contact center or from callers outside the contact center.

 **Note:**

You cannot sign out as an agent when your agent status is in the Ready state.

---

On the top bar, click **Agent Status** > **Logout** and select the appropriate reason code from the list, if available.

The system logs you out from the ACD server with the associated reason code (if applicable) indicating that you are not available for ACD calls. You can log in again by clicking the **Login Agent** option. 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 phone.

---

---

## Closing the Avaya one-X Agent application

1. On the top right corner of the top bar, click **Close Application**.  
If you have not signed in as an agent, the system exits the Avaya one-X Agent application.

If you have signed-in, the system displays an alert message.

2. Click **Sign Out and Exit**.



# Chapter 9: Managing the Contact List window

The Contact List window contains a list of individual record of customers, prospects, vendors, and business partners. Each contact record contains individual's records with contact information. You can add information, such as, work telephone number, home telephone number, cell phone, postal address, and other personal information. You can create any number of contact records, or import a contact from your Outlook Contact or corporate directory.

 **Note:**

Avaya one-X Agent may also import the contact list from an existing IP Agent installation when you launch the Avaya one-X Agent application for the first time.

This section explains how to create, update, delete, and find a contact. You will also learn how to add contacts from Work Log or how to import contacts from Outlook Contact or corporate directory. In addition, you will explore how to tag a contact as favorite and to add a contact to the speed-dial list.

---

## Viewing individual contacts

The Contact List window displays a list of individuals and businesses.

- 
1. On the action bar, click **Contact List**.  
The system displays the Contact List window with individual records.
  2. To set the view, perform one of the following actions:
    - To view the list of contacts in the list, from the **Show** field, select **All contacts**.
    - To view contacts marked as favorite, from the **Show** field, select **Favorites**.

You can also save a contact to the favorite list or to the speed dial list. To tag a contact as favorite, right-click a contact and select **Tag > Favorite**. To save a contact to the Speed Dial list, right-click a contact and select **Tag > Speed Dial**.
  3. To close the Contact List window, at the top right corner of the Contact List window, click **Close**.
-

**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

---

## Creating a new contact

Use the following steps to create contact records for individuals or businesses.

- 
1. On the action bar, click **Contact List**.
  2. At the bottom of the Contact List window, click **+**.
  3. In the Contact Details dialog box, complete the fields and click **OK**.  
You must complete the fields highlighted in red to add a contact to the list.  
The system displays the newly created contact appears in the Contact List window.  
For Contact Details dialog box field descriptions, see [Contact Details dialog box field descriptions](#) on page 92.

---

**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

---


## Contact Details dialog box field descriptions

The Contact Details dialog box provides the following controls.

Mandatory fields are marked with an asterisk (\*) mark.

Name	Description
<b>Favorite</b>	Selecting the <b>Favorite</b> check box will save the contact to the favorite list.
<b>Speed Dial</b>	Selecting the <b>Speed Dial</b> check box will store the contact in the Speed Dial list. This introduces check boxes against the <b>Work</b> , <b>Mobile</b> , <b>Home</b> , and <b>IM</b> fields.
<b>First Name</b>	Use the <b>First Name</b> field to enter the first name of the contact.
<b>Last Name</b>	Use the <b>Last Name</b> field to enter the last name of the contact. You can also enter name of an organization where you have a contact number but no specific person to contact.
<b>Work</b>	Use the <b>Work</b> field to enter the office telephone number of the contact. The system uses the work phone as a default phone. Enable the

Name	Description
	check box against this field to include the work number in the speed dial list.
<b>Mobile</b>	Use the <b>Mobile</b> field to enter the mobile number of the contact. Enable the check box against this field to include the mobile number in the speed dial list.
<b>Home</b>	Use the <b>Home</b> field to enter the home telephone number of the contact. Enable the check box against this field to include the home number in the speed dial list.
<b>Email</b>	Use the <b>Email</b> field to enter an e-mail address of the contact.
<b>IM</b>	Use the <b>IM</b> field to enter the SIP address of the IM contact. You must select the corresponding check box to enable this the IM option for the contact. Enable the check box against this field to include the IM as the speed dial option.
<b>Company</b>	Use the <b>Company</b> field to enter the name of the company.
<b>Address 1</b>	Use the <b>Address 1</b> field to enter the contact's company address.
<b>Address 2</b>	Use the <b>Address 2</b> field to enter complete the contact's company address. This is an optional field.
<b>City</b>	Use the <b>City</b> field to enter the city name.
<b>State</b>	Use the <b>State</b> field to enter the state name.
<b>Zip</b>	Use the <b>Zip</b> field to enter the zip code.

Icon	Name	Description
	Call	Selecting the check box enables you to make voice calls to the telephone and clearing the check box selection disables you from making voice calls.

**Related topics:**

- [Making a call from the Text Input field](#) on page 53
- [Making a call from the Contact List window](#) on page 54
- [Making a call from the Work Log window](#) on page 54
- [Making a call using the Speed Dial list](#) on page 55
- [Making a call to your supervisor](#) on page 56
- [Making a call from the Dialpad window](#) on page 56
- [Creating a new contact](#) on page 92
- [Viewing individual contacts](#) on page 91
- [Removing contacts from the Contact List window](#) on page 98
- [Modifying contact details](#) on page 96
- [Importing a contact from a directory](#) on page 94

---

## Adding a contact from the Work Log window

- 
1. On the action bar, click **Work Log**.  
The system displays the Work Log window with recent call records.
  2. In the Work Log window, expand the contact details of the contact you want to add to your contact list.
  3. Click **+** button adjacent to the expanded contact details. This displays the Contact Details dialog box.
  4. Enter appropriate information on the Contact Details dialog box.
  5. Click **OK**. The contact gets saved to your contact list.
- 

### Related topics:

[Work Log panel field descriptions](#) on page 174

---

## Importing a contact

You can import a contact from your Outlook Contact or a public directory. To import contact from Outlook Contact, you or your system administrator must have configured the exchange sever address in the System Settings dialog box. To import contact from a public directory, you or your system administrator must have defined the public directory service. You can configure these settings from the System Settings dialog box.

---

## Importing a contact from a directory

### Prerequisites

Ensure that the corporate directory has been defined in **System Options > System Settings > Directory** . For steps, see [Defining a Public Directory service](#) on page 135.

- 
1. On the action bar, click **Contact List**.
  2. At the bottom of the Contact List window, click **Advanced Search**.
  3. In the Advanced Search window, perform the following steps:
    - a. In the **Search In** field, choose **Directory**.

The system displays the Directory option (if the directory service has been defined).

- b. In the **Field** drop-down field, choose the appropriate field through which you want to refine your search.
  - c. In the **Search** field, enter a valid string to search within the selected data field. For example, after setting the search type to Name, enter `Smith` in the field and press the Enter key. You can use an asterisk (\*) as a wildcard for a string. For example, entering the string, `j*n`, returns all names beginning with **J** and ending with **N** with one or more characters in between. This could include entries such as John, but also entries such as Joseph Brown. The system displays a list of contacts matching the search criteria.
  - d. Click **Search**.
4. Select the contact from the list and click **Add to Contacts**. The system adds the directory contact to the Contact List window.

---

#### Related topics:

[Contact Details dialog box field descriptions](#) on page 92

---

## Importing a contact from Outlook Contacts

### Prerequisites

Ensure that the Exchange Server address has been configured in **System Options > System Settings > Outlook Contacts** . For steps, see [Configuring Outlook Contacts](#) on page 136.

1. On the action bar, click **Contact List**.
2. At the bottom of the Contact List window, click **Advanced Search**.
3. In the Advanced Search window, perform the following steps:
  - a. In the **Search In** field, choose **Outlook Contact**. The system displays the Outlook Contacts option (if the Exchange Server address is configured).
  - b. In the **Field** drop-down field, choose the appropriate field through which you want to search.
  - c. In the **Search** field, enter a valid string to search within the selected data field. For example, after setting the search type to Name, enter `Smith` in the field and press the Enter key. You can use an asterisk (\*) as a wildcard for a string. For example, entering the string, `j*n`, returns all names beginning with **J** and ending with **N** with one or more characters in between. This could include entries such as John, but also entries such as Joseph Brown.

The system displays a list of contacts matching the search criteria.

- d. Click **Search**.
4. Select the contact from the list and click **Add to Contacts**.  
The system adds the contact to the Contact List window.

---

**Related topics:**

[Outlook Contacts panel field descriptions](#) on page 137

---

## Modifying contact details

- 
1. On the action bar, click **Contact List**.
  2. In the Contact List window, right-click a contact and select **Edit Contact**.
  3. In the Contact Details dialog box, modify the fields as appropriate.
  4. Click **OK**.  
The system updates the corresponding fields for the contact.

---

**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

---

## Finding a contact

Avaya one-X Agent provides a basic search mechanism to find a contact in the contact list. Use the following steps to search a contact name or a telephone number by specifying keywords in the Text Input field.

- 
1. On the action bar, change the **Work Options** menu to **Search Contacts**.
  2. In the **Text Input** field, enter the contact name or a telephone number.  
As you type, the system dynamically displays the characters that match the result in the Contact List window. You can refine your search using a combination of **Show** and **View** fields in the Contact List window.



**Note:**

The character-by-character filtering is only available for contacts in the Contact List window.

3. To optimize your search:
  - a. At the bottom of the Contact List window, click **Advanced Search**.  
The system displays the Advanced Search window.
  - b. In the **Search in** field, select **Contacts**.
  - c. In the **Field** drop-down field, choose the appropriate field through which you want to refine your search.
  - d. In the **Search** field, enter a valid string to search within the selected data field. For example, after setting the search type to Name, enter `Smith` in the field and press the Enter key. You can use an asterisk (\*) as a wildcard for a string. For example, entering the string, `j*n`, returns all names beginning with a **J** and ending with an **N** with one or more characters in between. This could include entries such as John, but also entries such as Joseph Brown.
  - e. Click **Search**.

The system queries the service and displays the result.

---

---

## Tagging a contact as favorite

You can save a contact to a favorite list and gain quick access to the frequently used contacts, especially when there is a large list of contacts in the Contact List window.

1. On the action bar, click **Contact List**.
  2. In the Contact List window, right-click a contact and select **Tag > Favorite**.  
The system tags the contact as favorite.
- 

---

## Adding a contact to the Speed Dial list

You can save a contact to the Speed Dial list and use it when you want to have immediate access to these entries at the time of adding a call to Work Item, adding a participant during conference, or transferring the call from the associated menu.



**Tip:**

Use the Speed Dial option to add experts in the contact center who frequently assist you during an active call.

- 
1. On the action bar, click **Contact List**.
  2. In the Contact List window, right-click a contact and select **Tag > Speed Dial** .  
The system adds the contact to the Speed Dial list.
- 

---

## Removing contacts from the Contact List window

- 
1. On the action bar, click **Contact List**.
  2. In the Contact List window, right-click a contact and select **Delete Contact**.  
You can select one or more contacts from the Contact List window by holding down the **Ctrl** key and selecting contacts.  
The system displays the Delete Confirmation dialog box.
  3. Click **OK**.  
The system removes the selected contact or contacts from the Contact List window.
- 

**Related topics:**

[Contact Details dialog box field descriptions](#) on page 92

# Chapter 10: Managing the Work Log window

The Work Log window keeps the call records for incoming and outgoing calls. A single call record contains contact name, telephone number, date/time, and call duration. Further, each call record contains dialed DTMF number, screen pop name, and work code details.

This section explains how to view a list of work logs, view additional details, sort contacts, find a work log, and delete a call log using the Work Log window. You will also learn how to configure work log settings and how to find and optimize the search criteria.

---

## Viewing the Work Log window

The Work Log window displays the records of dialed or received calls with full information of a call record. Each call record includes name, number, date/time, and duration. You can set the options to view call records by date or by call type.

 **Note:**

You can configure the Work Log window to record the type of calls the system must record, specify number of days the system must keep the work record in the history, and set the number of work logs the Work Log window must display per screen. The option to configure these settings are available in **System Options > System Settings > Work Log**.

- 
1. On the action bar, click **Work Log**.
  2. To view records by date, perform any one of the following actions In the Work Log window:
    - To view all call records, from the **Show** field, select **All Entries**.
    - To view today's call records, from the **Show** field, select **Today**.
    - To view yesterday's call records, from the **Show** field, select **Yesterday**.
    - To view current month's records, from the **Show** field, select **This Month**.

The system displays the instances of work logs matching the criteria.

3. To view records by call type, perform any one of the following actions, in the Work Log window:
  - To view all types of call records, from the **View** field, select **All Contacts**.
  - To view outgoing voice call records, from the **View** field, select **Outgoing Voice**.

- To view incoming voice call records, from the **View** field, select **Incoming Voice**.
- To view incoming video call records, from the **View** field, select **Incoming Video**.
- To view outgoing video call records, from the **View** field, select **Outgoing Video**.
- To view incoming voice calls records, from the **View** field, select **Incoming Voice**.
- To view conference calls, from the **View** field, select **Conference**.

You can use the combination of **Show** and **View** fields in the Work Log window to optimize your view.

The system displays the instances of work logs matching the criteria.

4. Perform any one of the following actions:
  - To browse through the Work Log page sequence, at the bottom of the Work Log window, click the forward or the backward arrow button.
  - To sort the view order, click the corresponding column headings.
  - To dial or re-dial a call, click the corresponding call icon for the associated call log.
5. To close the work log window, click **Work Log** again.

---

**Related topics:**

[Work Log panel field descriptions](#) on page 174

---

## Viewing additional log details

Each work log includes the name of the disconnecting party, DTMF digits entered (if any), a screen pop name, and work code. You can view these in the work log list.

- 
1. On the action bar, click **Work Log**.
  2. In the Work Log window, click the arrow button available to the left of the associated contact.  
The system displays the details below the selected work log.

---

**Related topics:**

[Work Log panel field descriptions](#) on page 174

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## Viewing interaction transcripts

### Prerequisites

To be able to view the IM and TTY transcripts on the Work Log window, the **Save Transcripts** check box related to the following fields on the Work Log panel must be selected:

- **Log Incoming IMs**
- **Log Outgoing IMs**
- **Log Incoming TTYs**
- **Log Outgoing TTYs**

If the **Save Transcripts** check box for any of the above options is cleared, the corresponding entry will be absent on the work log transcript.

---

Transcripts of IM and TTY interactions can be viewed on the Work Log window.

- 
1. On the action bar, click **Work Log**. The application displays the Work Log window with the recent work logs.
  2. Expand the work log for which you want to view the IM or TTY transcript.
  3. Click the view transcript icon of the expanded work log. This displays the interaction transcript on a new Transcript window.
- 

---

## Removing the work log records

Use the following steps to remove call records from the Work Log window in order to keep the call record information as relevant as possible.

- 
1. On the action bar, click **Work Log**.
  2. In the Work Log window, right-click a work log record and select **Delete Work Log Record(s)**.

You can select one or more contacts from the Work Log window by holding down the **Ctrl** key and selecting work logs.

The system removes the work log record from the Work Log window.

---

**Related topics:**

[Work Log panel field descriptions](#) on page 174

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## Clearing the work log history

- 
1. On the top bar, click **Settings > System Settings > Work Log**.
  2. In the **Work Log** panel, click **Clear History**.  
The system displays a confirmation dialog box.
  3. Click **OK**.  
The system clears the work log records from the computer.
  4. Click **OK**.
- 

---

## Finding a work log record

The text input field is a convenient starting point for searching a call record in the Work Log window. You can find a call record by specifying contact names and telephone numbers in the text input field.

 **Note:**

Avaya one-X Agent shares the search field with Contact List and changes contextually based on the selection.

Use the text entry field to find contact names or telephone numbers in the Work Log window. To refine your search criteria, see [Searching a contact log using Advanced Search](#).

- 
1. On the action bar, click **Work Log**.
  2. From the **Function** menu, choose **Search Contacts**.
  3. In the **Text Entry** field, specify a contact name or a telephone number.  
As you type, the system dynamically displays the characters that match the result in the Work Log window. You can filter the keywords further by using the combination of **Show** and **View** fields in the Contact List window.
- 

**Related topics:**

[Searching a work log using the Advanced Search window](#) on page 103

[Work Log panel field descriptions](#) on page 174

---

## Searching a work log using the Advanced Search window

Use the **Advanced Search** option to easily filter contact records or a list item in the Work Log window. You can refine your search by specifying a name, number, date, and date range.

 **Note:**

The Advanced Search functionality changes depending on the search type. If you are searching for a call record, the Advance Search options change contextually.

Use the **Advanced Search** option to perform a comprehensive search for a call record or a group of call records in the Work Log window.

- 
1. On the action bar, click **Work Log**.
  2. At the bottom of the Work Log window, click **Advanced Search**.
  3. In the Advanced Search window, perform the following steps:
    - a. In the **Search** field, select an appropriate option.
    - b. In the **View** field, select an appropriate option.
    - c. In the **Search** field, enter a valid string to search within the selected data field. For example, after setting the search type to **Date**, enter 10/10/2008 in the field.

You can use an asterisk (\*) as a wildcard for a string. For example, entering the string, j\*n, returns all names beginning with a **J** and ending with an **N** with one or more characters in between. This could include entries such as John, but also entries such as Joseph Brown.
  4. Click **Search**.

The system queries the data and displays all the possible contacts that match the criteria in the Advanced Search window.
  5. Perform any of the following steps:
    - To call a contact in the list, click **Call** for the associated contact.
    - To sort the call record order, click the corresponding column headings.
    - To browse through work logs page sequence, click the forward or backward arrow buttons at the bottom of the Advanced Search window.
- 

**Related topics:**

[Finding a work log record](#) on page 102

[Work Log panel field descriptions](#) on page 174





# Chapter 11: Managing Launch Application

The **Launch Application** menu provides you the option to run external applications.

## Related topics:

[Launching an external application](#) on page 87

---

## Adding a launch item

1. On the action bar, select **System Options > System Settings** .
2. In the System Settings dialog box, click **Launch Application**.
3. In the **Launch Application** panel, click **Add**.  
The system displays an untitled launch item in the Launch Applications list.
4. In the **Launch Application** list, click the untitled launch item and enter the name for the launch item.
5. In the **File, Folder or URL to launch** field, click **Browse** to navigate either to a filename or to a folder. For example, to add Microsoft Word in the Launch Application menu, navigate to `C:\Program Files\Microsoft Office\OFFICE11\WINWORD.EXE`  
If you select or enter a folder name instead of a filename, the remaining fields on the Application Launch menu remains inactive as you cannot apply these properties to browse to the folder launch items.
6. In the **Description** field, enter a short description for the launch item.
7. Optionally, perform the following steps:
  - To enter additional parameters for the third-party application, in the **Parameter to pass** field, enter additional values at the command line.
  - To assign a default directory to execute a launch item, in the **Default Directory** field, enter the default directory path.

### **Note:**

The launch item property is important for any third-party application that requires internally relative paths to its own execution.

8. Click **Test** to verify the launch item configuration.

The application passes the filename or the browse folder, parameters, and the default directory information to the ShellExecute Windows API to determine whether the application launches according to your expectation.

---

**Related topics:**

[Launch Applications panel field descriptions](#) on page 171

---

## Rearranging the launch item

Perform the following steps to change the order of appearance of launch items in the **Launch Application** menu.

- 
1. On the action bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, click **Launch Application**.
  3. In the **Launch Applications** list, select an item and perform any one of the following actions:
    - To move the selected launch item above the current position in the **Launch Application** menu, click **Up**.
    - To move the selected launch item below the current position in the **Launch Application** menu, click **Down**.

The system rearranges the selected launch item in the **Launch Application** menu.

---

**Related topics:**

[Launch Applications panel field descriptions](#) on page 171

---

## Removing a launch item

- 
1. On the action bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, click **Launch Application**.
  3. In the **Launch Application** panel, click **Remove**.  
The system displays a confirmation dialog box.
  4. Click **OK**.

The system removes the selected launch item from the **Launch Application** menu.

---

**Related topics:**

[Launch Applications panel field descriptions](#) on page 171



# Chapter 12: Managing the VuStats Monitor window

The VuStats Monitor window periodically updates certain ACD status information from Communication Manager and displays it on the Avaya one-X Agent VuStats Monitor window. You can schedule the refresh rate to monitor each transmission of the VuStats information before the VuStats Monitor changes focus from one VuStats line of display to the next one in the list. This section explains the VuStats configuration.

 **Note:**

Only Communication Manager administrators have privileges to assign the VuStats button to an extension.

**Related topics:**

[Viewing the VuStats Monitor window](#) on page 87

---

## Configuring an extension for VuStats

The Vu-display feature button is similar to the VuStats button on the telephone.

For an Avaya one-X Agent extension to display the VuStats information, your administrator must set the following configurations on your Communication Manager:

- Assign the extension as a telephone type. The telephone must have a display panel.
- The extension must have one or more buttons assigned with the vu-display feature. Different streams of VuStats information are available by specifying the format and ID parameters of the vu-display feature.
- For different views and formats, you can assign multiple VuStats configurations to the buttons for this extension.

For information on configuring extensions for the VuStats feature through your Communication Manager, see the "VuStats" section of *Avaya Communication Manager, Guide to ACD Call Centers*.

For definitions and reference material for the VuStats fields, see the forms of the Communication Manager in the *Administrator Guide for your Avaya communication server*.



# Chapter 13: Managing the Dial Pad window

Avaya one-X Agent provides the Dual-tone multi-frequency (DTMF) capability and functions as any other touch-tone telephone. The Dialpad window also provides raw Communication Manager button access, and access to the line appearances and telephone display information directly. The option to use the numeric keypad to dial an outbound call or answer an incoming call is available in the Dialpad window. This section explains the dial pad management. You will learn how to customize favorite buttons, create touch tone short cuts, and assign favorite buttons to the dialpad.

## Important:

Avaya recommends you to use the dial pad call control functions only if the application is unable to provide functions of Communication Manager. Such operations can compromise the Work Item and Agent State display paradigms in the main Window.

---

## Viewing the Dialpad window

1. On the action bar, click **Dialpad**.
2. In the Dialpad window, perform any of the following steps:
  - To view the expanded Dialpad window, click >> on the right panel of the window.
  - To view the collapsed Dialpad Window, click << on the right panel of the window.

The application displays the Dialpad window with a fully functional alpha-numeric dial pad. To remove alphabets from the dial pad keys, go to **System Options > Agent Preferences > User Interface** and clear **Display letters on Dialpad** check box.

---





### Related topics:

[Dialpad window button descriptions](#) on page 112

## Dialpad window button descriptions

Depending on the buttons you select on Favorite Buttons dialog box, the application displays the corresponding buttons on the expanded Dialpad window.

You can see any of the following buttons in the expanded Dialpad window:

Button	Description
<b>Release</b>	Clicking the <b>Release</b> button closes an active call.
<b>Manual-in</b>	<p>Clicking the <b>Manual-in</b> button allows the system to accept ACD calls manually when you release a live call. You can use <b>Manual-in</b> button only if you have logged in as an agent.</p> <p> <b>Note:</b> You can use <b>Manual-in</b> button only if you have logged in as an agent.</p>
<b>Auto-In</b>	<p>Clicking the <b>Auto-In</b> button allows the system to changes your agent state to ready state after releasing the call.</p> <p> <b>Note:</b> You can use <b>Auto-In</b> button only if you have logged in as an agent.</p>
<b>After-call</b>	<p>Clicking the <b>After-call</b> button starts the after call work timers immediately after releasing a call for post-call processing. During post-call processing, the agent is not available to accept any additional ACD calls. For details, see <a href="#">Wrapping up the call (After Call Work)</a>.</p> <p> <b>Note:</b> You can use <b>After-call</b> button only if you have logged in as an agent.</p>
<b>Aux-work</b>	<p>Clicking the <b>Aux-work</b> button changes your agent status to auxiliary. This means you will not be available to answer ACD calls. For details, see <a href="#">Changing the agent work status</a> on page 81.</p> <p> <b>Note:</b> You can use <b>Aux-work</b> button only if you have logged on as an agent.</p>



Button	Description
<b>Assist</b>	Clicking the <b>Assist</b> button dials a call to the supervisor. For details, see <a href="#">Making a call to your supervisor</a> on page 56.
<b>Work Code</b>	Clicking the <b>Work Code</b> button opens a <b>Work Code</b> panel at the bottom of the Work Item in the Work List window. For details, see <a href="#">Assigning a work code</a> on page 84.
<b>Last-number</b>	Clicking the <b>Last-number</b> button dials the last called number from the Work Log window.
<b>Normal</b>	Clicking the <b>Normal</b> button to place the station display into normal call identification mode.

**Related topics:**

[Viewing the Dialpad window](#) on page 111

---

## Creating Touch Tone shortcuts

Use the following steps to create a Touch-Tone number and to use it as a shortcut in the Dial Pad window.

1. From the top bar, select **Settings > System Settings**.
2. On the left of the System Settings dialog box, click **Touch-Tone Shortcuts**.
3. Click **Add**.  
The system displays an untitled item in the Touch-Tone Shortcuts list.
4. In the **Touch Tone Shortcuts** list, double-click the Untitled item and specify the touch-tone shortcuts name.
5. In the **Phone Number** field, enter a valid telephone number and include \* or #.  
The phone number can be an extension number, a PSTN number, or a mobile number.
6. Click **OK** and close the System Settings window.  
The system saves the touch-tone number in the Touch-Tone Shortcuts list. The new telephone number will be available as a Touch-Tone Shortcut in the dialpad window.

**Related topics:**

[Touch Tone Shortcuts panel field descriptions](#) on page 181

---

## Customizing the favorite buttons

All buttons give you menu access to all the feature buttons for the registered extension. Avaya one-X Agent provides options to customize favorite buttons to appear on the expanded Dial Pad view. You can add up to eight favorite buttons feature buttons including the touch-tone shortcuts. All buttons give you menu access to all feature buttons for the registered extension.

Any buttons available as features or as Touch Tone shortcuts are defined at the time of customizing the favorite buttons. If an agent moves to another extension using the same User Profile, the Communication Manager button features change and bases the buttons on the new extension. The Favorite Communication Manager buttons (not shortcuts) may disappear if the buttons were defined for one extension and are not available on the second extension.

 **Note:**

Administrators must ensure that favorite buttons are available on all telephones for agents having hot-desking option.

Use the following steps to add or remove the favorite buttons on the expanded Dial Pad window.

- 
1. On the Dial Pad window, select **Settings > Select Favorite Buttons** .  
You can also customize the favorite buttons from **System Options > Agent Preferences > User Interface > Select Favorite Buttons** .
  2. In the Favorite Buttons dialog box, perform any of the following actions:
    - To add favorite buttons, select the appropriate button option from the left panel of the Dial Pad window.
    - To remove favorite buttons, clear the appropriate button from the right panel of the Dial Pad window.
  3. Click **OK**.  
The Dial Pad window displays the favorite buttons.

---

**Related topics:**

[Favorite Buttons dialog Box field descriptions](#) on page 114

---

## Favorite Buttons dialog Box field descriptions

The Favorite Buttons dialog box allows you to choose up to eight buttons. The following are the buttons available on the Favorite Buttons window.

Button	Description
<b>Release</b>	The <b>Release</b> button is equivalent to ending a call in the work list window or hanging up the telephone.
<b>Manual In</b>	The <b>Manual In</b> button is equivalent to accepting the call in the <b>Manual Accept</b> mode.
<b>Auto In</b>	The <b>Auto In</b> button is equivalent to accepting the call in the <b>Auto-Accept</b> mode.
<b>AfterCall</b>	The <b>AfterCall</b> button is equivalent to wrapping up the call in the ACW mode.
<b>AuxWork</b>	The <b>AuxWork</b> button is equivalent to setting the agent status to auxiliary mode. Use the <b>AuxWork</b> button to refuse an ACD call.
<b>Assist</b>	The <b>Assist</b> button is equivalent to dialing a call to the supervisor. Use the <b>Assist</b> button to place a call to the supervisor directly.
<b>Work Code</b>	The <b>Work Code</b> button is equivalent to assign a work code to the work item in the Work List window. Use the <b>Work Code</b> to assign a work code to the work item.
<b>last-numb</b>	The <b>last-numb</b> button allows you to re-dial the previously dialed number.
<b>Normal</b>	Clicking the <b>Normal</b> button to place the station display into normal call identification mode.

**Related topics:**

[Customizing the favorite buttons](#) on page 114



# Chapter 14: Managing video calls

Avaya one-X Agent makes video communication as simple as a telephone call. Using the video feature, you can conduct a face-to-face video communication with a customer or an agent in My Computer and Desk Phone modes. You do not actively initiate or receive a video call. If your company's media server supports video, and your extension is registered with the media server, Avaya one-X Agent opens the video window (or provides the video control buttons) in the Work List window automatically.

## Example

A prospective buyer, seeking information or a demo for a new mobile phone, clicks the corresponding subject from an in-store kiosk. Upon choosing a selection, the system sends a video call to the available agent with the appropriate skill sets by creating a two-way video call between the buyer and an agent. Further, the agent can share video demo of the phone or invite the buyer to complete the form by sharing the desktop application.

### Note:

Avaya Video Telephony Solution is an optional Avaya one-X Agent feature and requires the Communication Manager Remote Feature Activation (RFA) license. For information about license requirement, see *Administering Communication Manager for Avaya one-X Agent*.

---

## Initiating a video call

You can make video call from contacts list, work log, speed dial, favorite lists, or by dialing a telephone number from the text entry field.

### Prerequisites

- Web camera with microphone connected to the USB port of your personal computer.
- Preferred Camera is set to Auto in **Agent Preferences > Video > Advanced** .

Use the following step to send a face-to-face video call to a customer outside the contact center or to an agent in the contact center.

---

Initiate a call using any one of the steps from the section [Making a call](#) on page 53. The system sends a call to the selected caller. If the participating caller is available for the video call, the system displays a video icon indicating that the called-party is available for the video call. When the participant accepts the call, the system displays the Video window with live images of the participant.

---

---

## Answering a video call

### Prerequisites

- Web camera with microphone connected to the USB port of your personal computer.
- Preferred Camera is set to Auto in **Agent Preferences > Video > Advanced** .

Use the following steps to answer a video call from a customer outside the contact center or from an agent in the contact center.

1. When the system recognizes an incoming video call, Avaya one-X Agent rings with the corresponding icons in the Work List window indicating a call.
2. Answer the call by performing the steps in [Answering a call](#) on page 51. The system displays the Video window with live images of the participant.

---

## Acquiring or releasing the remote camera

Use the following steps to acquire or release the video broadcast from the remote camera from the Work List window or the video window.

During a video call, perform any of the following actions in the Video window:

- To acquire video broadcast from the remote camera , click **Start**
- To release the video broadcast from the remote camera during an active call, click **Stop**.

### Related topics:

[Video Basic tab field descriptions](#) on page 154

---

## Changing the video view settings

You can change the video preview window during a live video call. By default, the video window displays the Picture-in-Picture view.

- 
1. Open the Video window.
  2. select the **View** menu, select any of the following options:
    - To view only the video broadcast from the remote camera, select **Far View Only**.
    - To view your videos from your camera and video broadcast from the remote camera, select **Picture in Picture**.
    - To project video on a screen in a conference room from a laptop where no video group system is available, select **Optimum Size**.
- 

---

## Sharing your computer desktop

You can share your computer screen during a video call. By sharing your computer screen, you are allowing the participant to view an application, or providing your computer controls for a participant to use the programs on your computer.

---

During a video conversation, click the **Source** menu and select **Share Desktop**.

---

---

## Sharing a video file

You can share a video file with a contact. For example, you can share a video demonstration of a product, or play a video tutorial on how to use a specific product.

### Prerequisites

- Windows Media player or Real Player
- The video format with \*.mpeg\*, avi, or a \*.wmv extensions

- 
1. During a video conversation, from the **Source** menu, select **Share Video File**.
  2. In the Select Video File to Play dialog box, browse to the video file and click **OK**.  
The video begins to play on the remote callers video window.
-

---

## Muting or unmuting the video

Use the following steps to mute or unmute your video broadcast to the remote party during a video call.

---

During a video call, perform any of the following actions in the Video window:

- To mute your video broadcast, click **Mute**.
  - To unmute your video broadcast, click **Unmute**.
- 

---

## Closing the video window

You can close the video window when not in use. Alternatively, you can also set the system to close the video window automatically after the call.

---

On the top right corner of the Video window, click **Close**.

Closing in the video window will not result in ending the video call.

---

### Related topics:

[Configuring the video broadcast settings](#) on page 122

---

## Previewing the video window

You can preview the video window manually, or configure Avaya one-X Agent to start the video window in a preview mode automatically on each login.

### Prerequisites

- Web camera connected to your personal computer.
- Preferred Camera is set to Auto in **System Settings > Agent Preference > Video** .
- The Source menu is set to Web Camera in the Video window.



- 
1. On the top bar, click **System Settings > Agent Preference > Video** .
  2. In the **Video** panel:
    - To launch the Video window in the preview mode manually, click **Open Video Window**.

The system displays the Video window.

    - To configure the system to start the Video window in preview mode on each login, click the **Advanced** tab and enable the **Open video window automatically on login option**.

The system starts the Video preview window in the next login.
  3. Click **OK**.

---

**Related topics:**

[Video Basic tab field descriptions](#) on page 154

---

## Adjusting the video quality

You can optimize the video quality as much as possible in the event of network performance issues.

- 
1. On the top bar, click **System Options > Agent Preferences > Video** .
  2. In the **Video** panel, use the following options:
    - Choose **Image sharpness** for sharp and clear picture. You may use this option when a participant is seated and when you need to share a document during the video call.
    - Choose **Motion Smoothness** to make video motion appear smooth, even though the picture may lose detail.
  3. Click **OK**.

---

**Related topics:**

[Video Basic tab field descriptions](#) on page 154

---

## Configuring the video broadcast settings

You can set the system to open or close the Video window automatically upon accepting the call or ending the call.

- 
1. On the top bar, click **System Settings > Agent Preference > Video** .
  2. In the **Video** panel:
    - If you want the system to open the video window upon accepting the video call, select **Broadcast video automatically**.
    - if you want the system to close the video window after ending the video call, select **Close video window automatically**.
  3. Click **OK**.

---

### Related topics:

[Video Basic tab field descriptions](#) on page 154

[Closing the video window](#) on page 120

---

## Optimizing the video performance

The video settings can influence your overall system performance. To optimize your computer performance, you must adjust the video settings of Avaya one-X Agent.

- 
1. On the top bar, click **System Settings > Agent Preference > Video** .
  2. In the **Video** panel, click the **Advanced** tab.
  3. In the **Advanced** tab, perform any one of the following options:
    - To balance the video performance with other running applications when a video session begins, select **Balanced**.

The system controls the video performance of Avaya one-X Agent with other running applications, thereby optimizing the overall system performances.

    - To optimize the video performance in conjunction with other running applications when a video session starts, select **Video optimized**.

The system optimizes the video performance of Avaya one-X Agent slowing down the performance of other running applications.

- To enhance the performances of active applications running on your Windows desktop in conjunction with video performance when a video session starts, select **Applications optimized**.

The system optimizes the performance of active Windows applications and slows down the video performance of Avaya one-X Agent.

4. Click **OK**.

---

**Related topics:**

[Video Advanced tab field descriptions](#) on page 155



# Chapter 15: Managing greetings

The Greetings feature frees you from repeating the same greeting at the beginning of each call. When you accept an ACD call, the system mutes your microphone and plays the selected greeting. After playing the greeting, the system un-mutes your microphone and allows you to talk to the called party. You can configure agent greetings to play only for specific telephone numbers or VDNs from which calls originate. In addition, you can also record a "rote" recording, for example, reviewing the standard Terms and Conditions of a transaction or sale that is about to be accomplished and play the recording manually.

This section explains how to record and activate a greeting. It explains how to modify or delete a greeting. You will also learn how to configure a greeting to play for a specific VDN or ANI.

---

## Recording an agent greeting

You can record your greetings and use them when answering calls.

### Prerequisites

- Change the agent status to Auxiliary or After Call Work mode to prevent interruptions from incoming calls when you are recording your greeting.
- Connect your headset to your personal computer.

- 
1. On the top bar, click **System Options** > **Agent Preferences** .
  2. In the Agent Preferences dialog box, click **Record Greetings**.
  3. In the **Record Greetings** panel, click **+**.  
The system displays a new greeting in the **Record Greetings** list.
  4. Select the newly added greeting and click **Record**. This starts recording the audio.
  5. Speak the greeting into the headset microphone.
  6. When you have finished recording your greeting, click **Stop**.
  7. Click **Play** to test or listen the recording.
  8. To arrange Agent Greetings in the list:

- a. Select an agent greeting.
  - b. Click the **Up** or **Down** button as appropriate.
9. Click **OK**.

---

**Related topics:**

- [Playing recorded greetings manually](#) on page 82
- [Setting Greeting Triggers activation criteria](#) on page 127
- [Activating a recorded greeting](#) on page 43
- [Record Greetings panel field descriptions](#) on page 157

---

## Activating a recorded greeting

You must activate the Record Greetings option for the system to play the greeting. You can have more than one active greeting at the same time.

For example, you can set multiple greetings to be active if each greeting has a unique Vector Directory Number (VDN) as the activation criterion. This is also true for Agent Greetings that play for specific Automatic Number Identification (ANI) telephone numbers or Prompted Digits.

If two recorded greetings meet the same criteria that make them eligible for a single call, Avaya one-X Agent chooses the first one on the search list.

### Prerequisites

You must have at least one greeting recorded to be able to activate a recorded greeting.

- 
1. On the top bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, select **Greetings Triggers**.  
The system displays the **Greetings Triggers** panel.
  3. In the **Greetings Triggers** list, select a greeting.
  4. Click **OK**.  
You can manually play the selected greeting on the incoming call.

---

**Related topics:**

- [Greetings Triggers panel field descriptions](#) on page 166
- [Setting Greeting Triggers activation criteria](#) on page 127
- [Recording an agent greeting](#) on page 125
- [Record Greetings panel field descriptions](#) on page 157

---

## Setting Greeting Triggers activation criteria

### Prerequisites

At least one agent greeting in the Agent Greeting list before assigning the greeting, see [Recording an agent greeting](#) on page 125

---

Use the following steps to configure the agent greeting to play for a specific VDN or ANI properties of an agent greeting.

- 
1. On the top bar, click **System Options > System Settings**.
  2. In the System Settings dialog box, and select **Greetings Triggers**.  
The system displays the selected agent greetings in the **Greeting Triggers** list.
  3. In the **Greetings Triggers** list, select the appropriate trigger.
  4. From the **Auto Play** drop-down field, choose an appropriate setting.
  5. If you want the system to play the agent greeting for incoming ANI numbers:
    - a. Enable the **Match ANI Digits** option.
    - b. In the **Match ANI Digits** field, specify the ANI digits.
    - c. In the **Match Criteria** field, specify the location in the ANI digits from where you want to find the digits. For example, if you set the **Match Criteria** to **From Right** option, the digits specified in the **Match ANI Digits** field must match the last digits in the ANI number to play an agent greeting.
  6. If you the want the system to play the agent greeting for incoming VDN numbers:
    - a. Click the **Match VDN Digits** check box.
    - b. In the **Match VDN Digits** field, specify the VDN digits.
    - c. In the **Match Criteria** field, specify the location in the VDN digits from where you want to find the digits.
  7. If you the want the system to play the agent greeting for incoming prompted digits:
    - a. Click the **Match Prompted Digits** check box.
    - b. In the **Match Prompted Digits** field, specify the prompted digits.
    - c. In the **Match Criteria** field, specify the location in the prompted digits from where you want to find the digits.
  8. Click **OK**.

---

### Related topics:

[Activating a recorded greeting](#) on page 43

[Recording an agent greeting](#) on page 125

[Record Greetings panel field descriptions](#) on page 157

---

## Modifying a greeting

1. On the top bar, click **System Options > Agent Preferences** .
2. In the Agent Preferences dialog box, click **Record Greetings**.
3. In the **Agent greetings** panel, to re-record an agent greeting:
  - a. Select an appropriate agent greeting in the **Recorded Greetings** list, and click **Record**.
  - b. Record your greetings.
  - c. When you finish the recording, click **Stop**.
  - d. Click **Play** to test the recording.
4. To arrange an agent greeting in the list:
  - a. Select the agent greeting that you want to modify.
  - b. Click the **Up** or **Down** button as appropriate.
5. Click **OK** to save the changes.  
The system applies the changes and updates the selected greeting.

---

### Related topics:

[Record Greetings panel field descriptions](#) on page 157

---

## Deleting a greeting

1. On the top bar, click **System Options > Agent Preferences** .
2. In the Agent Preferences dialog box, click **Record Greetings**.
3. In the **Record Greetings** panel, highlight the greeting and click -.  
The system displays a confirmation dialog box.
4. Click **OK**.  
The system removes the selected greeting from the list.



**Related topics:**

[Record Greetings panel field descriptions](#) on page 157

---

## **Avaya Switcher II headset support for Desk phone and Other phone**

If you are working on a Windows XP machine with Service Pack 2, you can work using the Switcher II headset to listen to the agent greetings. The Other Phone and the Desk Phone configurations can support agent greetings if you use an Avaya Switcher II headset.

For information on using Avaya Switcher II headset, refer to <http://www.plantronics.com/media/> link.



# Chapter 16: Managing Screen Pops

A Screen Pop refers to a display of a pop up window with the caller's information on your computer desktop. A Screen Pop launches an application or opens a remote application through a web browser while answering an inbound call or during the processing of an outbound phone call. Depending on the Screen Pop configuration, you can specify applications to pass parameters.

"For example, when you receive an inbound call, the call includes an ANI or a caller id. In case of Advanced Segmentation, you can use the ANI or the caller id to query a remote database to search the caller name and other relevant information. If the caller id is not available, an Interactive Voice Response (IVR), if engaged, will prompt the caller to enter an ID source (for example, credit card number). Once the phone system collects data, it passes the id source to Avaya one-X Agent, which thereby, initiates a screen pop and passes the information as parameters to the screen pop application."

This section explains steps to manage a screen pop and how to enable a screen pop for inbound and outbound calls.

---

## Creating a screen pop

You can configure a Screen Pop for both incoming and outgoing calls. You can configure a screen pop to launch a desktop application (for example, a client database, a trouble ticket program, or a custom application), or to open a remote application containing reference to a web application and other call-related data in a web application format.

1. On the top bar, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** panel, click **Add**.  
The system displays an untitled item in the Screen Pop list.
4. In the **Screen Pop** list, click the untitled item and rename it.
5. In the **Address or URL of program** field, perform one of the following steps:
  - To open a remote application containing reference to a web application as a screen pop, type a valid Web address.

 **Note:**

The URL can be CGI scripts, java scripts, or any other Web-enabled tools. For example, type `http://www.mycompany.com/data?`

tel. The precise format of the full URL will depend on what data and in what format the Web application is expecting.

- To use a windows application as a screen pop, specify a valid directory path of a windows application. For example, type `C:\Program Files\Adobe\Acrobat 7.0\Acrobat\Acrbat.exe`.

 **Note:**

The application can be any filename with an extension specified in the Windows Registry as having an associated application that is used to open, for example, .html, .doc, or .txt extensions. If a filename is specified in the field does not have a valid application association in the Registry, Windows will display an error message.

6. In the **Address or URL of Program** field, click the arrow button to include information as parameters with URL string. Each call may contain a called name, number, prompted digits, or user-to-user information (UUI). Using any of the following parameters to retrieve a caller information:
  - %n: This parameter passes the name of the other party on the call, if available.
  - %m: This parameter passes the telephone number of the other party on the call, if available.
  - %p: This parameter passes the digits the caller selected while being processed through a vector, if available.
  - %v: This parameter passes the VDN name through which the call was connected.
  - %u: This parameter passes User-to-User-Information that was collected by Communication Manager from a centralized application.
  - %s: This parameter passes the time when Avaya one-X Agent received the telephone call.
  - %e: This parameter passes the time when the telephone call was terminated.
  - %d: This parameter passes the current date when Avaya one-X Agent received the telephone call.

You can also specify the Prompted Digit (%v) and User To User Info (%p) parameters manually within the URL address string. For example, type `http://www.mycompany.com/data?tel=%v`.

7. Click **Test** to verify that the configuration of the selected screen pop works as intended.
8. To indicate when the application must trigger the screen pop for inbound calls, from **Trigger when an inbound call is**, select an appropriate trigger.
9. To indicate when the application must trigger the screen pop for outbound calls, from **Trigger when an outbound call is**, select appropriate triggers.

10. If you want, the screen pop application to start when an incoming calls appears on a specific VDN, select **Trigger only when VDN is** and enter a VDN in the associated field that allows initiating the corresponding screen.  
If, through Communication Manager, you assign VDN names with more than 15 characters, you may encounter a situation where your screen pop may match multiple VDN names. To avoid this situation, you should not create VDN names longer than 15 characters.
11. Click **OK**.  
The system saves the settings and uses the selected screen pop for any subsequent call, if applicable.

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**Related topics:**

[Screen Pop panel field descriptions](#) on page 169

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## Activating a screen pop

1. From the top bar, click **Settings > System Settings** .
2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** panel, select the check box corresponding to the screen pop to be activated.  
The system activates the selected screen pop.
4. Click **OK**.

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**Related topics:**

[Screen Pop panel field descriptions](#) on page 169

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## Modifying a screen pop

1. From the top bar, click **System Options > System Settings** .
2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** list, select a screen pop that you want to modify.

4. Apply the necessary changes.
5. Click **OK**.

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**Related topics:**

[Screen Pop panel field descriptions](#) on page 169

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## Deleting a screen pop

- 
1. From the top bar, click **System Options > System Settings** .
  2. In the System Settings dialog box, click **Screen Pop**.
  3. In the **Screen Pop** list, select the screen pop click **Remove**.  
The system displays a confirmation dialog box.
  4. Click **OK**.  
The system removes the selected screen pop from the list.
  5. Click **OK**.

---

**Related topics:**

[Screen Pop panel field descriptions](#) on page 169

# Chapter 17: Managing Public Directory and Outlook Contacts

This section provides steps to define a public directory or to configure Outlook Contacts. You will learn how to search a contact from the directory and how to customize the Advanced directory fields.

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## Defining a Public Directory service

Public Directory provides access to corporate or public directory services. It functions as an Lightweight Directory Access Protocol client (LDAPv2 or LDAPv3). You must first create and configure the service with Avaya one-X Agent to be able to import or search a contact in the public directory (LDAP).

1. On the top bar, select **Settings > System Settings > Directory** .
2. In the **Directory** panel:
  - a. Click **Add**.
  - b. Double-click the untitled item and rename the item.
  - c. In the **Server Address** field, enter the network domain or IP address of the Public Directory server.
  - d. In the **Port** field, enter the port number as 389.
  - e. In the **Login** field, enter a valid user name in this field (If the Public Directory server requires authorization).
  - f. In the **Password** field, enter the password for the user name specified in the **Login** field.

If you are unsure of the settings for your Public Directory server, contact the administrator of that system.
  - g. In the **Search Root** field, specify an LDAP format string representing the information type.

For example, `ou=people, o=mycompany.com` specifies that information under the organization unit of “people” within the organization of “mycompany.com” is used for the search. Refer to the documentation for your LDAP system and company database configuration for more information on Base DN or Search Root strings.

- h. In the **Time Out** field, specify the search time out in seconds, for example enter 30.
    - i. In the **Max Entry** field, specify the maximum entry to return, for example, 1234.
    - j. In the **Bind Options** field, choose an appropriate option.
  3. Click **OK**.  
The system creates a public directory to the list of available services and closes the Directory dialog box.

---

**Related topics:**

[Directory panel field descriptions](#) on page 173

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## Configuring Outlook Contacts

You can import contacts from Outlook Contacts if you have configured the exchange server address with Avaya one-X Agent.

1. On the top bar, select **Settings > System Settings > Outlook Contacts** .
2. In the **Outlook Contacts** panel, perform the following steps:
  - a. In the **Exchange Server Address** field, enter the Outlook Exchange Server address.  
You can obtain the exchange server address from the e-mail account dialog box.
  - b. In the **User Name** field, enter a valid user name in this field.
  - c. In the **Password** field, enter the password for the user name specified in the **User Name** field.  
If you are unsure of the settings for your Public Directory server, contact the administrator of that system.
  - d. In the **Domain** field, enter the domain name.
  - e. In the **Time Out** field, specify the search time out in seconds, for example, enter 30.
3. Click **OK**.

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**Related topics:**

[Outlook Contacts panel field descriptions](#) on page 137



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## Outlook Contacts panel field descriptions

The Outlook Contacts panel allows you to configure Microsoft Outlook Contact with Avaya one-X Agent. The Outlook Contacts panel contains the following controls:

Name	Description
<b>Exchange Server Address</b>	Use the <b>Exchange Server Address</b> field to enter the exchange server address.
<b>User Name</b>	Use the <b>User Name</b> field to enter the login name to access the exchange server address (if the exchange server requires authorization).
<b>Password</b>	Use the <b>Password</b> field to enter the password for the associated user name specified in the <b>User Name</b> field.
<b>Domain Name</b>	Use the <b>Domain Name</b> field to enter the domain name of the exchange server.
<b>Time Out</b>	Use the <b>Time Out</b> field to enter the time out interval in seconds for the search to expire. For example, enter 200.

### Related topics:

[Importing a contact from Outlook Contacts](#) on page 95

[Configuring Outlook Contacts](#) on page 136

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## Deleting a public directory service

1. At the bottom of the Contact List window, click **Advanced Search**.
  2. In the Advanced Search dialog box, click **Options > Directory Settings**.
  3. From the **Directory** menu, select **Remove**.  
The system displays a confirmation dialog box.
  4. Click **Yes**.  
The system removes the public directory from the directory service.
  5. Click **OK**.
-

**Related topics:**

[Directory panel field descriptions](#) on page 173

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## Organizing the Advanced Search fields

You can select fields from the public directory service or Outlook Contacts in the Search Public Directory window.

Use the following steps to configure the Search Public Directory window.

- 
1. At the bottom of the Contact List window, click **Advanced Search**.
  2. In the Advanced Search dialog box, click **Options > Field Organizer** .  
If the Field Organizer window does not contain any fields, you must first run a query of the Public Directory service with the default settings so that the application retrieves the list of available fields from the directory.  
The system displays the Field Organizer dialog box.
  3. In the **Available Fields** list, highlight the field you want to add to the Advanced Search window.  
You can highlight multiple fields in this list box by holding down the **Ctrl** key and clicking the cursor on each field name.
  4. Select the arrow button (>) to move the selected fields to the **Show fields in this order** list box.  
The left arrow button (<) will remove the highlighted field from the **Show fields in this order** list box. The double arrow buttons (<< and >>) will move all fields from one list box to the other.
  5. To change the order of the fields in the **Show fields in this order** list box:
    - a. Highlight the field to move by clicking on it.
    - b. Use the **Up** and **Down** buttons as appropriate.
  6. Click **OK**.  
You must run a new query to view the selected fields and the associated order.
-

# Chapter 18: Managing phone numbers

You can add a new phone number to Another Phone configuration to log in to Avaya Communication Manager as an off-site agent. You can add any type of phone number including cellular telephone, or an extension. This section explains procedures to manage phone numbers. You learn how to add a phone number and how to manage them.

---

## Adding a new phone number

### Prerequisites

- Ensure that Dialing Rules have been defined properly.
- You need not prefix the number by an ARS or a long distance code.

- 
1. On the top bar, click **System Options** > **System Settings** .
  2. In the System Settings dialog box, click **Phone Numbers**.
  3. In the **Phone Numbers** panel:
    - a. Click **Add**.
    - b. Click the untitled item and rename the item.
    - c. Enter a valid phone number.

The phone number can be an extension number, a PSTN number, or a mobile number.

4. Click **OK**.  
The system saves the new phone in the phone list.

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### Related topics:

[Phone Numbers panel field descriptions](#) on page 164

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## Modifying the phone number

- 
1. On the top bar, click **System Options** > **System Settings** .
  2. In the System Settings dialog box, click **Phone Numbers**.
  3. To change the phone number name, in the **Phone Numbers** list, click on the untitled item and rename the item.
  4. To change the telephone number, in the **Phone Number** field, enter a new phone number.
  5. Click **OK** to save the settings.  
The system updates the corresponding fields.
- 

**Related topics:**

[Phone Numbers panel field descriptions](#) on page 164

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## Deleting a phone number

- 
1. On the top bar, click **System Options** > **System Settings** .
  2. In the System Settings dialog box, click **Phone Numbers**.
  3. In the **Phone Numbers** panel, highlight a phone number and click **Remove**.  
The system displays a confirmation dialog box.
  4. Click **OK**.  
The system removes the phone in the phone list.
- 

**Related topics:**

[Phone Numbers panel field descriptions](#) on page 164

# Chapter 19: Sharing the desktop

You can share your desktop and the applications running on your desktop using this feature. This feature is most effective while performing consultation with other agents or supervisors and also for sharing data. You can share your desktop just at a click of a button with the agent on call with you. Since sharing desktop is only possible on an active call, you are saved from specifying the recipient of your shared desktop.

## Click to share menu

The **Click to share** menu appears as a work item object. This menu allows you to initiate desktop sharing with the corresponding agent on call. The application displays the menu in the work item window every time you receive or call an agent in your enterprise network.

## Shared desktop window

The Shared desktop window is somewhat similar to the video window, but with limited controls. It provides the following controls:

- **End Screen Sharing** button that allows you to end desktop sharing
- **View** menu to help you select the correct window size (default 25%)
- **Duration** indicator to track the time elapsed in desktop sharing
- **Share source** to indicate the source of shared desktop

## Related topics:

[Starting desktop sharing](#) on page 141

[Sharing applications on the desktop](#) on page 142

[Ending desktop sharing](#) on page 143

---

## Starting desktop sharing

### Prerequisites

Desktop sharing is possible between two agents connected over a telephony call. Therefore, an active call is an absolute prerequisite for successful desktop sharing. Both agents on the call must communicate through Avaya one-X Agent 2.0.

Initiate a telephony call to the agent with whom you want to share your desktop. Follow these steps once the call work item appears on the work item window.

- 
1. Select **Click-to-share > Share Desktop** menu on the call work item. This adds a **Share screen** object below the call the call with **Screen Control** and **End Screen Sharing** buttons.
  2. Click **Screen Control**. This sends a desktop sharing request to the recipient and displays as a **Share Screen** object on the recipient's work item window with an **Accept Screen Share** button.
  3. The recipient must click **Accept Screen Share**. You can communicate to the recipient to do this action on the ongoing call. This launches the share window and the recipient is able to view your desktop.
- 

---

## Sharing applications on the desktop

### Prerequisites

Sharing of desktop applications is possible between two agents connected over a telephony call. Therefore, an active call is an absolute prerequisite for successful desktop sharing. Both agents on the call must communicate through Avaya one-X Agent 2.0.

---

Open the application that you want to share on your desktop and initiate a telephony call to the agent with whom you want to share your desktop. Follow these steps once the call work item appears on the work item window.

- 
1. Select **Click-to-share > Share Application > <application to share>** from the menu displayed on the call work item. This adds a **Share screen** object below the call with **Screen Control** and **End Screen Sharing** buttons.
  2. Click **Screen Control**. This sends a desktop sharing request to the recipient and displays as a **Share Screen** object on the recipient's work item window with an **Accept Screen Share** button.
  3. The recipient must click **Accept Screen Share**. You can communicate to the recipient to do this action on the ongoing call. This launches the share window and the recipient is able to view the application running on your desktop.
-

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## Ending desktop sharing

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To end the desktop sharing session, one of the agents on call must click **End Screen Share** on the application window or the Share window. The Share window closes and the desktop sharing is terminated.

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# Chapter 20: Supervisor desktop

Contact center supervisors need to perform various functions to monitor quality and perform contact center management. Avaya one-X Agent 2.0 introduces a set of new features that allow supervisors to perform these functions through the same interface. The new features integrate telephony, presence, instant messaging, desktop sharing, agent monitoring, reporting, and Communication Manager supervisor features and provide them on the Avaya one-X Agent interface.

## Service observing

Service observing allows a supervisor to observe an agent service. A supervisor can listen to agent-customer conversation using this feature. The agent does not get notified when service observing is in progress and agent can continue the conversation without any interference from the supervisor. Service observing is displayed as a work item on the Avaya one-X Agent application interface of the supervisor. The supervisor performing service observing can see the name of the agent being observed and the relevant time duration of observation.

## Quick alert

Quick alert provides an instant messaging capability to the supervisor. You can use this facility to send important messages or reminders to an observed agent while the agent is on a call. The messages are displayed to the agent on the Top bar of the Avaya one-X Agent application interface. Agents can respond using IM; however, this feature can be used to send one way messages from supervisor to the agent during a service observing session.

## Agent coaching

Supervisor can perform agent coaching while the agent is still on a call. Supervisor can listen to the agent's telephonic interaction and simultaneously engage in a coaching session using instant messaging (IM). Unlike quick alert, an agent can respond to the supervisor's messages on the IM window.

## Barge in

The Barge In feature allows the supervisor to directly enter an active call and engage in conversation with the agent and customer. This enables the supervisor to handle calls that require better call handling.

## Ad hoc transfer

Ad hoc transfer is done for calls where a supervisor has already connected to a call between an agent and the customer, and the agent has to drop the call and allow the supervisor and the customer to continue on the active call. 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 call gets transferred to the supervisor and is treated as a normal call work item.

## Remote agent log out

A supervisor can remotely log out an agent from the supervisor's contact list. This is possible only when the agent state is either **Available** or **Auxiliary** and not **Busy**. The supervisor's

Contact List window displays the list of supervised agents with their respective agent status displayed in the very first column of the Contact List window.

**Related topics:**

[Observing agent service](#) on page 146

[Sending a quick alert](#) on page 146

[Coaching an agent](#) on page 147

[Barging into an agent call](#) on page 148

[Performing an ad hoc transfer](#) on page 148

[Remotely logging out an agent](#) on page 148

[Viewing the agent work log and transcripts](#) on page 149

---

## Observing agent service

### Prerequisites

The agent that you want to observe must be a member of your team and must be listed in your contact list.

- 
1. Open the Contact List window.
  2. Click the **Service Observing** icon against the agent name. This displays the **Service Observe** menu.
  3. Select **Observe Agent** on the **Service Observe** menu. This loads a Service Observing work item on your application window, with the **Barge In** button. Listen in is turned on by default and you can listen the agent-customer interaction.



**Important:**

The observed agent does not get notified about being observed.

---

---

## Sending a quick alert

Use the following procedure to send quick alerts to your supervised groups or individual agents. You can also send quick alerts while service observing an agent.

- 
1. On the action bar, click **Contact List**. 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** button in front of the group name in your contact list.
- To send a quick alert to an agent, click the **Quick Alert** button in front of the agent name in your contact list.
- If you are service observing an agent, click the **Quick Alert** button against the work item you are observing.

This displays the Quick Alert window with a text box and the **Quick Alert** button becomes disabled for that particular group or contact.

3. Enter the quick alert text on the Quick Alert window and click **Send**. The message is displayed to the agent on the top bar of the Avaya one-X Agent application interface.

The **Quick Alert** button remains disabled until the agent closes the quick alert message. In case you have sent the message to a group, all members of the group must close the quick alert message to enable the **Quick Alert** button.

## Coaching an agent

### Prerequisites

A supervisor can initiate a coaching session while service observing an agent.

1. Start a service observing session for the agent you want to coach.
2. On the service observing work item, click the **Coach** button. This initiates an IM session with the agent and the agent hears an alert tone while on call.  
The screen focus shifts to the IM window for both the supervisor and the agent. If there are any automated responses already set for IM messages, these are exchanged first. An **Observe agent** icon is displayed on the agent IM window where coaching is in progress.
3. Type your message in the **Message entry box** of the IM window and press `Enter` or click **Send** to send your message.  
If you are working with multiple IM users, make sure your focus is on the correct IM session.

---

## Barging into an agent 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. The **Barge In** button is a toggle button and becomes a **Listen In** button.  
The agent's work item window expands to display the supervisor name and an **Observing** tag to indicate the supervisor intervention.
  3. To end the barge in session, click the **Listen In** button. The **Listen In** button becomes a **Barge in** button and service observing is restored.
- 

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## 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.

- 
1. Click the **Barge In** button on a service observing session. You can participate in the interaction between the agent and the customer on the active call.
  2. Ask the agent to click the **Call End** button. This ends the call on the agent's interface and you can see the same call transferred as a normal work item on your application Interface.
- 

---

## Remotely logging out an agent

### Prerequisites

Agent must be in **Available** or **Auxiliary** state and not in a call when you try to perform a remote log out. You cannot log out an agent when the agent state is **Busy**.

- 
1. Log on to Avaya one-X Agent as a supervisor.
  2. Click the **Contact List** icon to open the Contact List window.
  3. Expand the **My Team** list of your Contact List window.
  4. Click the **Agent Status** button next to the agent's last name whom you want to log out.
  5. Click **Log out** from the **Agent Status** list.  
The agent status changes to logged out on the Contact List window.
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---

## Viewing the agent work log and transcripts

You can view work log of agents from your configured contact list under **My Team**. To observe an agent outside your contact list, **My Team** group, you must first add the agent to your contact list under **My Team** and then view the agent's work log.

- 
1. Log on to Avaya one-X Agent as a supervisor.
  2. Click the **Contact List** icon to open the Contact List window.
  3. Click the **Service Observe** button corresponding to the agent name in the Contact List window. This opens a **Service Observe** menu.
  4. Click **View Work Log** on the **Service Observe** menu. This opens the Advanced Search window.
  5. Enter your search criteria in the **Search** field. You can also use \* (asterisk) as wild card and view all the work logs of the selected agent.
  6. Set the **From** and **To** date range to filter your search if required.
  7. Click the **Search** button.  
The work logs are displayed on the Advanced Search window.
  8. To view IM and TTY transcripts, expand the work item record and click the **View Transcript** button for one of the work logs.
-

Supervisor desktop

# Chapter 21: Agent preferences and controls

Avaya one-X Agent provides a centralized control to customize audio, video, and user interface. In addition, it allows you to manage call features, messaging, and record agent greetings. The Agent Preference dialog box offers various configuration panels. You can click the corresponding panel to view or change the settings.

You can open Agent Preference dialog box by clicking **System Options > Agent Preferences** from the top bar.

This section describes the Agent Preferences dialog box and its controls.

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## Audio panel field descriptions


The Audio panel consists of Basic and Advanced tabs. The Basic tab provides simple settings to adjust audio volume for playback, recording, and incoming calls. The Advanced tab allows you to troubleshoot audio related issues.




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## Audio Basic tab field descriptions

The Basic tab provides simple settings to adjust the audio volume for playback, recording, and incoming calls. You can also set the system to play a ring tone through your computer speaker and select a ringtone for an incoming call.

The Basic tab provides the following controls:

Name	Description
<b>Playback</b>	<p>Use the <b>Playback</b> slider to adjust the volume for the sound output through your computer speakers or headphones.</p> <p>Enable the <b>Mute</b> option to eliminate all sound output through your speakers or headset.</p> <p> <b>Note:</b> Voice on Playback is only applicable for the My Computer configuration. These settings get applied on your computer and do not affect your headset.</p>

Name	Description
<b>Record</b>	<p>Use the <b>Record</b> slider to adjust the recording volume of all sound transmitted through a microphone to your computer. Enable the <b>Mute</b> option to eliminate any sound sent to your computer through the microphone.</p> <p> <b>Note:</b> These settings will not affect a headset volume if that headset is attached to the telephone rather than your computer.</p>
<b>Ringling</b>	<p>Use the <b>Ringling</b> slider to adjust the volume of the sound played through your speakers or headset that occurs when you receive an incoming call. Enable the <b>Mute</b> option to eliminate any sound that indicates an incoming call.</p>
<b>Play ringing through the internal PC speakers</b>	<p>Enable the <b>Play ringing through the internal PC speakers</b> option to play the sound associated with an incoming call through the speakers of your personal computer and your headset simultaneously.</p> <p> <b>Note:</b> If your computer does not have an internal speaker, this option will have no effect.</p>
<b>Enable Sidetone</b>	<p>Side Tone refers to listening to what you say in the microphone. You cannot edit the settings and therefore the control is grayed out.</p>
<b>Use Custom ringtone</b>	<p>Enable the <b>Use Custom ringtone</b> option to set the system to play a custom ringtone (a Wave file) through your speakers or headset, when you receive an incoming call.</p> <p> <b>Note:</b> When you enable this option, the system displays a browse field below. Use the browse field to locate and set Wave file and the application plays the wave file every time you receive a call.</p>

**Related topics:**

[Audio Advanced tab field descriptions](#) on page 153

[Setting the audio options](#) on page 40



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## Audio Advanced tab field descriptions

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The Advanced tab allows you to select devices for the system to play agent greeting playback and to record an agent greeting. You can also use the Advanced tab for troubleshooting purposes.

The Advanced tab provides the following controls:

Name	Description
<b>Playback Device</b>	Use the <b>Playback Device</b> field to select the audio playback hardware available on your computer.
<b>Record Device</b>	Use the <b>Record Device</b> field to select the audio capture hardware available on your computer.

Button	Description
<b>Background Noise Test</b>	<p>The <b>Background Noise test</b> button allows you to determine the normal background noise levels and prevents Avaya one-X Agent from transmitting the background noise when you are not speaking during a call.</p> <p>When you click <b>Background Noise test</b>, the system opens the <b>Background Noise test</b> dialog box. You must click <b>Test</b> to determine the noise level.</p> <p> <b>Note:</b></p> <p>Do not cover the microphone or talk during the test. You may rerun the test if unusual noise levels occur during the test.</p>

### Related topics:

[Audio Basic tab field descriptions](#) on page 151

[Setting the audio options](#) on page 40


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## Video panel field descriptions

The Video panel consists of Basic and Advanced tabs. The Basic tab provides option to adjust video settings. The Advanced tab allows you to troubleshoot video related issues.

## Video Basic tab field descriptions

The Basic Video tab allows you to optimize the video settings. The tab provides the following controls:

Name	Description
<b>Preferred Camera</b>	Use the <b>Preferred Camera</b> field if you have more than one camera connected to your computer and to choose a video camera you want to use for video calls.   <b>Note:</b> The system lists only cameras that are connected to the computer.
<b>Broadcast video automatically</b>	Enable the <b>Broadcast video automatically</b> option to broadcast the video image immediately after accepting a video call.
<b>Close video window automatically</b>	Enable the <b>Close video window automatically</b> option to close the video window immediately after closing the video call.
<b>Open video window automatically on login</b>	Enable the <b>Open video window automatically on login</b> option to open the video window in preview mode when you login.
<b>Allow playing video file</b>	Enable this check box to enable playing a video file in a video interaction.
<b>Allow desktop sharing</b>	Enable this check box to enable desktop sharing on a video call.

Button	Description
<b>Open Video Window</b>	Clicking the <b>Open Video Window</b> launches the Video window on your computer desktop and acquires the video camera (if connected).

**Related topics:**

[Configuring the video broadcast settings](#) on page 122

[Adjusting the video quality](#) on page 121

[Previewing the video window](#) on page 120

[Acquiring or releasing the remote camera](#) on page 118

## Video Advanced tab field descriptions

The Advanced Video control tab provides complex settings that administrators use for trouble shooting.

The Advanced Video tab provides the following controls:

Name	Description
<b>Video Quality</b>	<p>The system maintains the video quality preference as much as possible in the event of network performance issues. You can optimize your video quality to:</p> <ul style="list-style-type: none"> <li>• <b>Image sharpness:</b> Select <b>Image sharpness</b> for a sharp, clear picture, even though the motion may not be as smooth. Select this option when a participant is seated and you need to share a document during the call.</li> <li>• <b>Motion Smoothness:</b> Select <b>Motion Smoothness</b> to make video motion appear smooth, even though the picture may lose detail. Select this option when you have not document to share.</li> </ul>
<b>Maximum Bit Rate</b>	<p>Use the <b>Maximum Bit Rate</b> field to select the bit rate to transmit video images.</p>
<b>Video System Performance</b>	<p>The video settings can influence your overall system performance. In order to optimize your system performance, you must adjust the video settings of Avaya one-X Agent. Avaya one-X Agent provides the following options in order to optimize overall system performance:</p> <ul style="list-style-type: none"> <li>• <b>Balanced:</b> Select the <b>Balanced</b> option to balance the video performance with other running applications when a video session begins. By doing so, the system controls the video performance of Avaya one-X Agent with other running applications, thereby optimizing the overall system performance.</li> <li>• <b>Video optimized:</b> Select the <b>Video optimized</b> option to optimize the video performance in conjunction with other applications that are running when a video session starts. By doing so, the system optimizes the video performance of Avaya</li> </ul>



Name	Description
	<p>one-X Agent slowing down the performance of other running applications.</p> <ul style="list-style-type: none"> <li>• <b>Applications optimized:</b> Select the <b>Applications optimized</b> to enhance the performance of applications that are running on the desktop when a video session starts. By doing so, the system optimizes the performance of active Windows applications and slows down the video performance of Avaya one-X Agent.</li> <li>• <b>Audio Buffer Size:</b> Select the appropriate audio buffer size from this list.</li> </ul>

**Related topics:**

[Optimizing the video performance](#) on page 122

## Call Handling panel field descriptions

The Call Handling panel allows you to enable or disable call settings. The Call Handling panel provides the following controls:

Name	Description
<b>Consultive Transfer</b>	<p>Enable <b>Consultive Transfer</b> to consult the caller before transferring the call.</p> <p> <b>Note:</b> You cannot transfer a call directly when you enable this option.</p>
<b>Consultive Conference</b>	<p>Enable <b>Consultive Conference</b> to consult the second caller before you add the first caller to the conference. Otherwise, System will ask you to place the call on hold before transferring or conferencing calls.</p> <p> <b>Note:</b> You cannot conference a call directly when you enable this option.</p>
<b>Auto Hold</b>	<p>Enable <b>Auto Hold</b> to put a live call on hold automatically before transferring or conferencing calls. Otherwise, you must manually place the call on hold before transferring or conferencing calls.</p>

Name	Description
<b>Incoming Calls</b>	<p>Use one or all the following options to set the incoming call notifications.</p> <ul style="list-style-type: none"> <li>• <b>Bring main window to front:</b> Enable <b>Bring main window to front</b> to bring the Window to the foreground and activate the window for a ringing call.</li> <li>• <b>Flash icon:</b> Enable <b>Flash icon</b> to view the call flashing in the task bar when the system recognizes an alerting call.</li> </ul>

**Related topics:**

[Putting a call on hold automatically](#) on page 60

[Putting a call on hold manually](#) on page 59

[Making a consultative conference call](#) on page 62

[Making a direct conference call](#) on page 61

[Making a consultive transfer](#) on page 65

[Making a direct transfer](#) on page 64

[Configuring the incoming call appearance](#) on page 38

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## Record Greetings panel field descriptions

The **Record Greetings** panel allows you to record agent greetings. By default, the first greeting in the list is set as a default agent greeting. You can create your own agent greetings to the manual playback menu using the **Record Greetings** panel.

The **Record Greetings** panel provides the following controls:

Button	Description
<b>Record</b>	Click <b>Record</b> to record your greetings for the associated Agent Greetings in the list.
<b>Play</b>	Click <b>Play</b> to play the greetings playback for the associated Agent Greetings in the list.
<b>Stop</b>	Click <b>Stop</b> to stop the greetings playback for the associated Agent Greetings in the list.
+	Click <b>+</b> to create a new agent greeting in the Agent Greetings list.
-	Click <b>-</b> to remove the selected agent greeting from the Agent Greetings list.
<b>Up</b>	Click <b>Up</b> to move up the selected agent greeting in the Agent Greetings pane.

Button	Description
<b>Down</b>	Click <b>Down</b> to move down the selected agent greeting in the Agent Greetings list.

**Related topics:**

[Setting Greeting Triggers activation criteria](#) on page 127

[Activating a recorded greeting](#) on page 43

[Recording an agent greeting](#) on page 125


[Deleting a greeting](#) on page 128

[Modifying a greeting](#) on page 128

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## User Interface panel field descriptions

The User Interface panel contains the following controls to manage the Avaya one-X Agent GUI:

Name	Description
<b>Always display the main window on top</b>	Enable the <b>Always display the main window on top</b> option if you want the application interface to appear in the foreground of desktop windows in front of all other windows applications.
<b>Display tooltips</b>	Enable the <b>Display tooltips</b> option if you want to view tooltips when you place the mouse pointer over the various UI objects.
<b>Display letters on Dialpad</b>	Enable the <b>Display letters on Dialpad</b> option if you want to view letters on the dial pad that correspond to the numbers on the number pad of a telephone.
<b>Display shortcut icon in system tray</b>	Enable the <b>Display shortcut icon in system tray</b> option if you want to view the Avaya one-X Agent icon in the System Tray of the windows taskbar.
<b>Save window positions</b>	<p>Enable the <b>Save window positions</b> option if you want to save the previous position of the main and the secondary windows on your personal computer.</p> <p> <b>Note:</b> This does not save the positions of configuration dialog boxes or other errors or warnings or status dialog box messages.</p>
<b>Show Phone Display</b>	Enable the <b>Show Phone Display</b> option to view call related and non-call related information at the

Name	Description
	bottom of the Work List window. The phone display panel shows information from sources, such as, VuStats or call-prompting digits.
<b>Buttons Toolbar</b>	Enable the <b>Button Toolbar</b> option to view the favorite buttons at the top of the Work List window. These buttons provide quick-access to options including Release, Manual In, Auto In, After Call, Aux Work, Assist, Work Code, Last Number.
<b>Select Favorite Buttons</b>	Use the <b>Select Favorite Buttons</b> in conjunction with Button Toolbar. The <b>Select Favorite Buttons</b> allows you to choose buttons that you want to use in the Button Toolbar and the Dial Pad window.

**Related topics:**

[Viewing the phone display on the main window](#) on page 48

[Setting the toolbar buttons on the main window](#) on page 48





# Chapter 22: System administration and controls

The System Settings dialog box offers an extensive and robust set of tools to administer the Avaya one-X Agent application. These settings affect the overall behavior of the application. When you open the System Settings dialog box, you will see the Login panel with controls along with other panels. To view or change settings in the panel, you must click the corresponding panel. You can access the System Settings dialog box by clicking **System Options > System Settings** from the top bar.

 **Important:**

You may not have permission to change, add, delete, or configure some of the features in the application as these features may have been restricted at the enterprise level. These restricted features are visible, but grayed out.

This section describes the System Setting dialog box and its panels.

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## Login panel field descriptions


The Login panel consists of Telephony, Agent and IM tabs. The Telephony tab allows you to configure the telephone settings with Communication Manager. The Agent tab allows you to configure your agent settings with the ACD server. The IM tab allows you to configure the logon settings for Presence Services.

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## Telephony Login panel field descriptions

The Telephony Login panel provides the following controls:

Name	Description
<b>Enable automatic connection to Communication Manager</b>	Registers the telephone extension with Communication Manager automatically using the previous successful registration. If cleared, prompts to provide settings at each login.
<b>Extension</b>	Registers the extension number in conjunction with Avaya one-X Agent.
<b>Password</b>	Registers the numeric password associated with the specified extension number.

Name	Description
<b>Save password during sign in</b>	Saves the password on signing in with the associated extension number.
<b>Server Address</b>	Sets the IP address or fully qualified domain name (FQDN) of the Communication Manager to which the extension must connect to perform all call control signaling for Avaya one-X Agent.
<b>License Type</b>	<p>Sets one of the following license types:</p> <ul style="list-style-type: none"> <li>• <b>Agent</b></li> <li>• <b>Non-agent</b></li> <li>• <b>Basic</b></li> <li>• <b>Supervisor</b></li> </ul> <p>Selecting the <b>License Type</b> decides which features will be available on logging on to Avaya one-X Agent. The features available are described in the subsequent table.</p> <p>Simply selecting the <b>Supervisor</b> license does not enable the supervisor features. The user credentials get authenticated from Central Management and Communication Manager before enabling the supervisor features.</p>
<b>Place and receive calls using</b>	<p>Sets the telephone line to register the telephone settings with Communication Manager. Depending upon the location, telephone set, and access network, select one of the following settings:</p> <ul style="list-style-type: none"> <li>• <b>My Computer:</b> To register agent personal computer as a phone with the Communication Manager.</li> <li>• <b>Desk Phone:</b> To register the office desk phone to register with the Communication Manager.</li> <li>• <b>Other Phone:</b> To register the user-defined telephone settings with Communication Manager.</li> </ul>
<b>Telephone at</b>	<p>Appears only on Avaya one-X Agent client UI if <b>Other Phone</b> is selected from <b>Place and receive call using</b> list. The telephone can be an analog telephone, a cellular telephone, or an extension on a local or remote switch.</p> <p> <b>Note:</b> The <b>Telephone At</b> field appears during a log in sequence. The system uses the number as a temporary sign in and does not store the phone</p>

Name	Description
	number in the Phone Numbers panel in the System Settings.

Features available for various license types:

Feature	Non-Agent	Agent	Supervisor	Basic
ACD	No	Yes	Yes	Yes
Telephony	Yes	Yes	Yes	Yes
Video	Yes	Yes	Yes	Yes
IM/Presence	Yes	Yes	Yes	No
TTY (works only in My Computer mode)	Yes	Yes	Yes	No
Desktop Sharing	Yes	Yes	Yes	No
Supervisor (feature)	No	No	Yes	No

**Related topics:**

[Setting up the Other Phone configuration](#) on page 32

[Setting up the Desk Phone configuration](#) on page 31

[Setting up the My Computer configuration](#) on page 29

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## Agent Login panel field descriptions

The Agent Login panel contains the following controls:

Name	Description
<b>Automatically sign into the ACD server</b>	Registers the agent extension with the ACD server automatically with the previous successful registration through Communication Manager.
<b>Agent</b>	Sets the agent extension number.
<b>Password</b>	Sets the numeric password associated with the specified agent extension number.
<b>Save agent password during sign in</b>	Saves the password associated with the agent extension number. This saves the effort to enter the password again at the next sign in.

Name	Description
<b>Default Agent State upon ACD connection</b>	<p>Sets the default agent state after successful connection with the ACD service. You can set the default agent state to:</p> <ul style="list-style-type: none"> <li>• <b>Ready</b> — for immediate availability after the ACD connection.</li> <li>• <b>Auxiliary</b> — to allows setting up workspace and adjust the application preferences immediately after the ACD connection.</li> </ul>

**Related topics:**

[Configuring the agent settings](#) on page 34

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## IM login field descriptions


The IM panel provides the following settings:

Name	Description
<b>Enable IM Login</b>	Select this check box to enable Instant Messaging and Presence Services features. The <b>IM</b> panel remains disabled if this check box is not selected.
<b>Enable automatic connection to IM server</b>	Select this check box to automatically connect to the Presence Services every time you sign in.
<b>User Name</b>	Enter the user name registered on the IM server.
<b>Password</b>	Enter the IM password.
<b>Domain</b>	Enter the domain name of the IM server.
<b>Save password during sign in</b>	Select this check box to save your IM login credentials. Select this check box enable agent's profile to save agent's IM credentials.
<b>Server Address</b>	Enter the IP address of IM server.

---

## Phone Numbers panel field descriptions

The Phone Number panels provides the following controls:

Name	Description
<b>Phone Numbers</b>	The <b>Phone Numbers</b> list displays the phone configurations along with the user-created telephone numbers.   <b>Note:</b> You can rename the phone number by clicking the corresponding items.
<b>Phone Number</b>	Use the <b>Phone Number</b> field to specify the telephone for the corresponding phone configuration.

Button	Description
<b>Add</b>	Clicking <b>Add</b> creates a new item in the Phone Number list.
<b>Remove</b>	Clicking <b>Remove</b> removes the item from the Phone Number list.

**Related topics:**

[Adding a new phone number](#) on page 139

[Modifying the phone number](#) on page 140


[Deleting a phone number](#) on page 140

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## Work Handling panel field descriptions

The Work Handling panel contains the following controls:

Name	Description
<b>Basic tab</b>	
<b>Work Completion for ACD calls</b>	
<b>Auto-Complete</b>	Resets the application to its original state. Selecting <b>Auto-Complete</b> disables most <b>Work Completion of ACD Calls</b> section settings.
<b>Allow Follow-Up</b>	Allows agent to perform follow-up tasks. This also enables agent to specify follow-up time, with an option of extending the follow-up task time.
<b>Timed Follow-Up</b>	Sets the time for the follow-up tasks. The time can be specified in seconds under <b>Time Period</b> .

Name	Description
<b>Allow extending Follow-Up</b>	Enables agent to extend the time specified for follow-up tasks.
<b>Transitions to Ready State</b>	
<b>Auto-Ready</b>	Transitions the agent to ready state automatically after the work item is completed.
<b>Manual-Ready</b>	Transitions the agent to an Aux state after the work item is completed. The Aux state is specified in <b>With Aux Code</b> .
<b>With Aux Code</b>	Sets the Aux state for <b>Manual-Ready</b> transition state. This field remains disabled if <b>Auto-Ready</b> is selected.
<b>Advanced tab</b>	
<b>Work Items</b>	
<b>Auto-Accept</b>	<p>Calls are accepted automatically.</p> <p> <b>Note:</b> This is not related to <b>CM Auto Answer Support Required</b> displayed on the Login window. However, the functionality is the same.</p>
<b>Manual-Accept</b>	Allows agent to manually accept calls.
<b>Communication Manager Ready Mode</b>	
<b>Auto In</b>	Automatically completes all work items.
<b>Manual In</b>	Allows agent to manually complete all work items.

**Related topics:**

[Answering a call automatically](#) on page 52

[Answering a call manually](#) on page 51

[Changing the agent work status](#) on page 81

[Viewing the Work Item details](#) on page 83


[Completing the work](#) on page 84

[Configuring the Work Handling options](#) on page 37

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## Greetings Triggers panel field descriptions

The Greetings Triggers panel provides the following controls:

Name	Description
<b>Greetings Triggers</b>	<p>Use the <b>Greetings Triggers</b> list to select appropriate greetings playback.</p> <p> <b>Note:</b> Before assigning the greeting, ensure that you have at least one greeting in the Greeting Triggers list, see <a href="#">Recording an agent greeting</a> on page 125.</p>
<b>Auto Play</b>	<p>Use the <b>Auto Play</b> drop-down field to choose an appropriate greeting trigger for an incoming call. You can set the system to trigger the greetings automatically in any of the following scenarios:</p> <ul style="list-style-type: none"> <li>• Select the <b>Do not autoplay</b> option if you do not want the system to play the greeting automatically. You will have to manually choose to play the greeting from the greetings menu on the main window.</li> <li>• Select the <b>When agent is in ready mode</b> option if you want the system to play the greeting for incoming calls when your agent status is set as <b>Ready</b>.</li> <li>• Select the <b>When agent is logged in</b> option if you want the system to play the greeting for incoming calls when you have logged in an agent.</li> <li>• Select the <b>For all incoming call</b> if you want the system to play the greeting for all incoming calls including direct calls.</li> </ul>
<b>Match ANI Digits</b>	<p>Selecting the <b>Match ANI Digits</b> check box plays the agent greeting if the ANI digit specified in the field (to the right of this check box) matches the telephone number for an incoming call. Use the <b>Match Criteria</b> field in conjunction with <b>Match ANI Digits</b> option to specify the location in the ANI digits from where you want to find the digits. For example, if you set the <b>Match Criteria</b> field to <b>From Right</b> option, the digits specified in the <b>Match ANI Digits</b> field must match the last digits in the ANI number to play an agent greeting.</p>
<b>Match VDN Digits</b>	<p>Selecting the <b>Match VDN Digits</b> check box plays the agent greeting if the VDN digit specified in the field (to the right of this check box) matches the telephone number for an incoming call. Use the <b>Match Criteria</b> field in conjunction with <b>Match VDN Digits</b> option to specify the location in</p>

Name	Description
	<p>the VDN digits from where you want to find the digits.                      For example, if you select the set the <b>Match Criteria</b> field to <b>From Left</b> option, the digits specified in the <b>Match VDN Digits</b> field must match the first digits in the VDN number to play an agent greeting.</p>
<b>Match Prompted Digits</b>	<p>Selecting the <b>Match Prompted Digits</b> check box plays the agent greeting if the prompted digit specified in the field (to the right of this check box), during vector processing, match digits in the associated field.                      Use the <b>Match Criteria</b> field in conjunction with <b>Match Prompted Digits</b> option to specify the location in the Prompted Digits from where you want to find the digits.                      For example, if you select the set the <b>Match Criteria</b> field to <b>Anywhere</b> option, the digits specified in the <b>Match Prompted Digits</b> field must match anywhere in the prompted digits to play an agent greeting.</p>

**Related topics:**

[Activating a recorded greeting](#) on page 43

## VuStats panel field descriptions


The VuStats panel provides the following controls:

Name	Description
<b>VuStats</b>	<p>The <b>VuStats</b> list field displays the VuStats information set that are available for viewing on the VuStats Monitor window.</p>
<b>Refresh Rate</b>	<p>Use the <b>Refresh Rate</b> field to define the refresh interval for each VuStats information before it changes the focus from the last line of display in the list to the first line.</p>
<b>Display interval</b>	<p>Use the <b>Display Interval</b> field to define the interval to display each VuStats before the VuStats Monitor changes focus from one VuStats line of display to the next one in the list.</p>




## Screen Pop panel field descriptions

The Screen Pop panel provides the following controls:

Name	Description
<b>Screen Pop</b>	The <b>Screen Pop</b> list displays a list of screen pops that you can use to launch an application or a Web service.
<b>Address or URL of program</b>	<p>Use the <b>Address or URL of program</b> field to enter an URL of the Web application containing reference to a Web application and call-related data in a Web application format. For example, to view the customer database application, type <code>http://internal.widgets.com/db/customers.exe</code> in the <b>Address or URL of Programs</b> field.</p> <p> <b>Note:</b> You may also specify the parameters from the Parameter column within the string.</p>
<b>Parameters</b>	<p>Use the following <b>Parameters</b> field to retrieve information from a caller:</p> <ul style="list-style-type: none"> <li>• Type %n to pass the name of the other party on the call, if available.</li> <li>• Type %m to pass the telephone number of the other party on the call, if available.</li> <li>• Type %p to pass the digits (prompted digits) the caller selected while being processed through a vector, if available.</li> <li>• Type %v to pass the VDN name through which the call was connected.</li> <li>• Type %u to pass the User-to-User-Information that Communication Manager collected from a centralized application.</li> <li>• Type %s to pass the time when Avaya one-X Agent accepts the telephone call.</li> <li>• Type %e to pass the time when Avaya one-X Agent terminates the telephone call.</li> <li>• Type %d to passes the current date when Avaya one-X Agent receives the telephone call.</li> </ul>

Name	Description
	You can test the settings by clicking the <b>Test</b> button.
<b>Trigger when an inbound call is</b>	<p>Use the <b>Trigger when an inbound call is</b> pane to indicate when the application must trigger the screen pop:</p> <ul style="list-style-type: none"> <li>• <b>Ringing:</b> Select this option if you want the system to start the screen pop when the phone rings.</li> <li>• <b>Answered:</b> Select this option if you want the system to start the screen pop when an agent answers the phone using the Avaya one-X Agent GUI or by picking up the telephone handset in the Desk Phone or any other telephone settings.</li> <li>• <b>Missed:</b> Select this option if you want the system to start the screen pop when the call appearance from an incoming call disappears after not being answered due to the caller hanging up or if the call being routed to a voice mail system after a specific number of rings.</li> <li>• <b>Released:</b> Select this option if you want the system to start the screen pop when you click the release button on the Avaya one-X Agent GUI, or hang up the telephone, the Desk Phone, or any other telephone configurations.</li> </ul>
<b>Trigger when an outbound call is</b>	<p>Use the <b>Trigger when an outbound call is</b> pane to indicate when the application must trigger the screen pop:</p> <ul style="list-style-type: none"> <li>• <b>Connected:</b> Select this option if you want the system to start the screen pop when the called-party answers the telephone.</li> <li>• <b>Released:</b> Select this option if you want the system to start the screen pop when you click the release button on the Avaya one-X Agent GUI, or hang up the telephone the Desk Phone or any other telephone settings.</li> </ul>
<b>Trigger only when the VDN is</b>	Enabling the <b>Trigger only when the VDN is</b> option starts the screen pop when an incoming call appears on a specific VDN.

Name	Description
	 <b>Note:</b> For the screen pop to run, you must enter the VDN name (up to 15 characters) in the associated field.

Button	Description
<b>Add</b>	Clicking <b>Add</b> creates an untitled screen pop item in the <b>Screen Pop</b> list.
<b>Remove</b>	Clicking <b>Remove</b> deletes the selected screen pop in the <b>Screen Pop</b> list.
<b>Test</b>	Clicking <b>Test</b> verifies the corresponding screen pop configuration.

**Related topics:**

[Creating a screen pop](#) on page 131

[Activating a screen pop](#) on page 133

[Modifying a screen pop](#) on page 133


[Deleting a screen pop](#) on page 134



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## Launch Applications panel field descriptions

The Launch Applications panel allows you to administer the properties a launch item.

The Launch Applications panel provides the following controls:

Name	Description
<b>Launch Applications</b>	The <b>Launch Applications</b> list displays all the launch items.   <b>Note:</b> You can rename the launch item by clicking on the corresponding launch items.
<b>File, Folder or URL to launch</b>	Use the <b>File, Folder or URL to launch</b> field to type a filename or a folder name. Alternatively, you can use <b>Browse</b> to navigate to either a filename or a folder. If you select or enter a folder name instead of a filename, the remaining fields on the Application Launch menu remains inactive, as you cannot

Name	Description
	<p>apply these properties to browse the folder launch items.</p> <p> <b>Note:</b> File, Folder or URL to Launch, Parameters to Pass, and Default Directory support the use of environment variables.</p>
<b>Description</b>	Use the <b>Description</b> field to provide a short description of the launch application. The description text provides the user a hint about the purpose of the launch item button.
<b>Parameters to Pass</b>	Use the <b>Parameters to Pass</b> field to enter additional values on the command line to a given third party application.
<b>Default Directory</b>	<p>Use the <b>Default Directory</b> field to assign a default directory when executing a launch item, or select the directory in the <b>Default Directory</b> field.</p> <p> <b>Note:</b> This launch item property is important for any third-party application that internally requires relative paths to its own execution location to reference the dependent components.</p>

Button	Description
<b>Add</b>	Clicking <b>Add</b> creates a new item in the Launch Applications list and in the Launch Application menu.
<b>Remove</b>	Clicking <b>Remove</b> removes the launch item from the Launch Application list and from the Launch Application menu.
<b>Up</b>	Clicking <b>Up</b> moves the selected launch item above its current position in the Launch Application field and the Launch Application menu.
<b>Down</b>	Clicking <b>Down</b> moves the selected launch item below its current position in the Launch Application field and the Launch Application menu.
<b>Test</b>	Clicking <b>Test</b> verifies that the launch item is properly configured. It passes the filename or the browse folder, parameters, and default directory information to the ShellExecute Windows API, which allows you to determine whether the application launches as expected.

**Related topics:**

[Removing a launch item](#) on page 106

[Rearranging the launch item](#) on page 106

[Adding a launch item](#) on page 105

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## Directory panel field descriptions

The Directory panel allows you to define and configure a directory. If you are unsure of the settings for your Public Directory server, contact your system administrator. Configuring Public Directory server allows you to communicate with Public Directory users using Avaya one-X Agent. You can add Public Directory contacts to your contact list and communicate with them using the various Avaya one-X Agent features. Since Avaya one-X Agent supports direct interaction with Microsoft Office Communicator (MOC), you can also add relevant IM addresses and directly communicate with Public Directory users using MOC.

The Directory panel provides the following controls:

Name	Description
<b>Directory Name</b>	The <b>Directory Name</b> list box displays a list of directories that are available for configuration. You can rename the directory name by which you want to identify the public directory server.
<b>Server Address</b>	Use the <b>Server Address</b> field to enter the network domain or the IP address of the public directory server.
<b>Server Port</b>	Use the <b>Server Port</b> field to enter the port number of the server.
<b>User Name</b>	This <b>User Name</b> field is optional. Use the <b>User Name</b> field if the public directory server requires authorization.
<b>Password</b>	Use the <b>Password</b> field to enter the password for the associated user name specified in the <b>User Name</b> field.
<b>Search Root</b>	Use the <b>Search Root</b> field to enter an LDAP format string representing an information type. For example, ou=people, o=mycompany.com specifies that information under the organization unit of "people" within the organization of "mycompany.com" is used for the search. Refer to the documentation for your LDAP system and company database configuration for more information on Base DN or Search Root strings.

Name	Description
<b>Time Out</b>	Use the <b>Time Out</b> field to specify the time out interval in seconds for the search to expire. For example, enter 200.
<b>Max Entry</b>	Use the <b>Max Entry</b> field to enter a maximum entry to return. For example, enter 200.
<b>Bind Option</b>	The Bind Options drop-down field allows you to choose the LDAP service type. You can choose any one of the following options: <ul style="list-style-type: none"> <li>• <b>Simple Bind</b>: Use the <b>Simple Bind</b> option if you want to interface the directory service with an LDAPv2 server.</li> <li>• <b>Active Directory GSS Bind</b>: Use the <b>Active Directory GSS Bind</b> option if you want to interface the directory service with an LDAPv3 server.</li> </ul>

Button	Description
<b>Add</b>	Clicking <b>Add</b> creates an untitled directory in the <b>Directory Name</b> list.
<b>Remove</b>	Clicking <b>Remove</b> deletes the selected directory from the <b>Directory Name</b> list.

**Related topics:**

[Deleting a public directory service](#) on page 137

[Defining a Public Directory service](#) on page 135

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## Work Log panel field descriptions

The Work Log panel provides the following controls:

Name	Description
<b>Log incoming calls</b>	Records all incoming calls in the Work Log window.
<b>Log Outgoing Calls</b>	Records all outgoing calls in the Work Log window.
<b>Log Incoming IMs</b>	Records all incoming IM interactions in the Work Log window.
<b>Log Outgoing IMs</b>	Records all outgoing IM interactions in the Work Log window.
<b>Log Incoming TTYs</b>	Records all incoming TTY interactions in the Work Log window.

Name	Description
<b>Log Outgoing TTYs</b>	Records all outgoing TTY interactions in the Work Log window.
<b>Save Transcripts</b>	Saves the transcript of the respective interaction. The transcripts can be viewed from the Work Log window.
<b>Days to keep contact records in history</b>	Sets the number of days you want the system to keep the records in the Work Log window.
<b>Number of contacts per screen</b>	Specifies the number of logs you want to view in the Work Log window at a time.
<b>Clear History</b>	Clears all records from the Work Log window.

**Related topics:**

[Adding a contact from the Work Log window](#) on page 94

[Removing the work log records](#) on page 101

[Viewing additional log details](#) on page 100

[Viewing the Work Log window](#) on page 99


[Searching a work log using the Advanced Search window](#) on page 103


[Finding a work log record](#) on page 102

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## Desktop Integration panel field descriptions

The Desktop Integration panel allows you to integrate additional plug-ins. It provides the following controls:

Name	Description
<b>Enable dialing numbers from Internet Explorer</b>	Use the <b>Enable dialing numbers from Internet Explorer</b> option if you want the system to dial a properly-formatted telephone numbers appearing on the Microsoft Internet Explorer page.   <b>Note:</b> The system provides the option to install the Click-to-Dial program at the time of installation. You must restart the Web program to activate the Desktop Integration feature.
<b>Enable dialing numbers from Fire Fox</b>	Use the <b>Enable dialing numbers from Fire Fox</b> option if you want the system to dial a properly-formatted telephone numbers appearing on the Mozilla Firefox page.

Name	Description
	<p> <b>Note:</b> The system provides the option to install the Click-to-Dial program at the time of installation. You must restart the Web program to activate the Desktop Integration feature.</p>

**Related topics:**

[Using the Click-to-Dial feature](#) on page 88

## Voice Mail Integration panel field descriptions

Avaya one-X Agent provides the ability to integrate voice message system with a telephone, an application, or a Web browser. You can enable the Message Waiting indicator on the registered extension and can retrieve the voice message from the voice mail system.



**Important:**

You can integrate any one of the voice mail service at any given time.



**Note:**

Before integrating the voice mail service for your extension, check with your system administrator that if your extension has been is registered with the voice mail system.

The Voice Mail Integration panel contains the following controls:

Name	Description
<p><b>Enable message access</b></p>	<p>Enable the <b>Enable message access</b> option if you want Avaya one-X Agent to initiate one of the options in the <b>When Voice Message Indicator is clicked</b> option when you click the Voice Mail icon on the main window.</p>
<p><b>When Voice Message Indicator is clicked</b></p>	<p>The <b>When Voice Message Indicator is clicked</b> option determines the action the system must perform when you click the voice message icon on the top bar.</p> <ul style="list-style-type: none"> <li>• <b>Dial this number:</b> Use the <b>Dial this number</b> option when you want the system to dial a telephone number or an extension in the associated field. You must provide a telephone number or an extension in the associated field.</li> <li>• <b>Start this application:</b> Use the <b>Start this application</b> option when you want the</li> </ul>



Name	Description
	<p>system to execute a program specified in the associated field when you click the Voice Mail icon. You must provide the path and the filename of an executable program file name in the associated field.</p> <ul style="list-style-type: none"> <li>• <b>Open web page:</b> Use the <b>Open web page</b> option when you want the system to open a Uniform Resource Locator (URL) address when you click the Voice Mail icon. You must provide a valid URL in the associated field.</li> </ul>

**Related topics:**

[Accessing your voice mails](#) on page 86

[Integrating the voice mail system](#) on page 43

[Integrating the voice mail system](#) on page 43

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## Reason Codes panel field descriptions

The Reason Codes panel contains the following controls:

List items of Select Menu to edit list box.	Description
<b>AUX Reason Codes</b>	Auxiliary reason codes describe the reason for changing your state to the AUX mode. Use the <b>AUX Reason Codes</b> list box to define auxiliary reason codes locally in the directory and to associate AUX reason codes with numeric reason codes supported in Communication Manager.
<b>Log Out Reason Codes</b>	Logout reason code describes the reason for logging out from the ACD service. Use the <b>Log Out Reason Codes</b> list box to create logout reason codes and to associate logout reason codes with numeric reason codes supported in Communication Manager.
<b>Work Reason codes</b>	You can create work codes and assign the work code at the time of completing the work item. Use the <b>Work Reason Code</b> list box to define work codes locally in the directory.

**Related topics:**

[Assigning a work code](#) on page 84

[Defining reason codes for auxiliary](#) on page 47


[Defining reason codes for logging out](#) on page 46

[Defining reason codes for work](#) on page 45

## Event Logging panel field descriptions

Use the Event Logging panel to configure the event logs for Avaya one-X Agent.

The Event Logging panel contains the following controls:

Name	Description
<b>Logging level</b>	<p>Avaya one-X Agent offers four different types of logging levels. These log levels are applicable to the oneXAgent.log files:</p> <ul style="list-style-type: none"> <li>• <b>DEBUG:</b> The DEBUG level logging records informational, error messages warning messages, and debug messages.</li> </ul> <p> <b>Note:</b></p> <p>Avaya does not recommend enabling the DEBUG level logging as there is a possible potential performance issue relating to the workstation especially when under-load of other applications, except for troubleshooting a specific issue that is not apparent in the INFO level logs.</p> <ul style="list-style-type: none"> <li>• <b>INFO:</b> The INFO level logging records informational, error messages and warning messages.</li> <li>• <b>WARNING:</b> The WARNING level logging includes errors and warnings.</li> <li>• <b>ERROR:</b> The ERROR level records only errors.</li> </ul>
<b>Appender</b>	<ul style="list-style-type: none"> <li>• <b>LocalLogging_AvayaFormat:</b> Follows Avaya specific logging specifications. The format is logging parser friendly but less user friendly. It also sends logs to the local “Log Files” directory.</li> <li>• <b>LocalLogging_GeneralFormat:</b> Produces easy-to-read logs that are more user friendly. The format sends logs to the local Log Files directory.</li> <li>• <b>CentralLogging:</b> Sends logs to central server. Administrator need to provide the</li> </ul>

Name	Description
	central logging server name or IP Address. This format is also parser friendly.
<b>Remote Host for Central Logging</b>	You can specify the remote host IP address for central logging.
Button	Description
<b>View Log</b>	Clicking <b>View Log</b> displays the log files for the corresponding log.

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## Outlook Contacts panel field descriptions

The Outlook Contacts panel allows you to configure Microsoft Outlook Contact with Avaya one-X Agent. The Outlook Contacts panel contains the following controls:

Name	Description
<b>Exchange Server Address</b>	Use the <b>Exchange Server Address</b> field to enter the exchange server address.
<b>User Name</b>	Use the <b>User Name</b> field to enter the login name to access the exchange server address (if the exchange server requires authorization).
<b>Password</b>	Use the <b>Password</b> field to enter the password for the associated user name specified in the <b>User Name</b> field.
<b>Domain Name</b>	Use the <b>Domain Name</b> field to enter the domain name of the exchange server.
<b>Time Out</b>	Use the <b>Time Out</b> field to enter the time out interval in seconds for the search to expire. For example, enter 200.

### Related topics:




[Importing a contact from Outlook Contacts](#) on page 95

[Configuring Outlook Contacts](#) on page 136

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## Dialing Rules field descriptions

The Dialing Rules panel contains the following controls:

Name	Description
<b>Number to dial to access an outside line</b>	<p>Sets the number required to access the Communication Manager.</p> <p> <b>Note:</b> In the context of Communication Manager, it is referred as the Automatic Route Selection (ARS) access code.</p>
<b>Your Country Code</b>	<p>Sets the country code to access the Communication Manager. For example, type 1 to access the Communication Manager from the United States, type 61 to access the Communication Manager from Australia, type 44 to access the Communication Manager from Great Britain, and type 91 to access the Communication Manager from India.</p>
<b>Your Area/City Code</b>	<p>Sets the three-digit area or a city code for dialing a location of the Communication Manager.</p>
<b>Number to dial for long distance calls</b>	<p>Sets the area or city code for dialing a location of the Communication Manager for long distance calls.</p>
<b>Number to dial for international calls</b>	<p>Sets the number required to access an outside line for dialing a location of the Communication Manager.</p>
<b>Length for internal extension calls</b>	<p>Sets the length of the number to dial for internal extension calls. For example, if an internal extension consist of five digits, enter 5. When you assign the length of the internal extension number, Avaya one-X Agent treats the dialed number consisting of the specified number of digits as an internal extension.</p> <p> <b>Note:</b> The Communication Manager may have multiple length extension numbers, for example, if your company supports internal extensions comprising of three-digit, five-digit, and seven-digit extensions, enter 3, 5, 7. You must use a comma to separate the values.</p>
<b>Length of national phone numbers including City/ Area code</b>	<p>Sets the length of the number for internal extension calls. This number should also include the code used to identify a city or an area.</p> <p> <b>Note:</b> Some countries support variable national phone numbers. You can enter each of the valid telephone number as a comma-separated list.</p>

Name	Description
	For example, you can type variable national phone numbers for countries that support multiple lengths as 10, 11, 12.
<b>Include area/city code when making a local call</b>	Makes the system display the actual telephone number, including the area and city code, that the system dials after dialing the number.
<b>Display confirmation window before dialing a number</b>	Makes the system display a confirmation message after a the call connection is established.

**Related topics:**

[Setting up the dialing rules](#) on page 35

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## Touch Tone Shortcuts panel field descriptions

Use the Touch Tone Shortcuts panel to create touch tone shortcuts in the Dialpad window. The Touch Tone Shortcuts panel contains the following controls:

Name	Description
<b>Touch Tone Shortcuts</b>	The <b>Touch Tone Shortcuts</b> field presents all the telephone numbers mapped to the Touch Tone Shortcuts option in the dialpad window. You may rename the telephone names by clicking on the corresponding names.
<b>Phone Number</b>	Use this field to specify the telephone number to the touch tone shortcuts panel. The telephone number can be an extension number or an analog telephone number.

Button	Description
<b>Add</b>	Clicking <b>Add</b> creates an 'Untitled' shortcut in the Touch Tone Shortcuts panel.
<b>Remove</b>	Clicking <b>Remove</b> deletes the selected item from the Touch Tone Shortcuts panel.


**Related topics:**


[Creating Touch Tone shortcuts](#) on page 113

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## Profiles panel field descriptions

The Profiles panel provides the following controls:

Name	Description
<b>Profiles</b>	<p>The <b>profiles</b> list displays the user-defined profiles with the default profile.</p> <p> <b>Note:</b> You cannot rename the profile. You must first copy the profile to the name you want, and then delete the copy you do not want.</p>

Button	Description
<b>+</b>	<p>Clicking <b>Add +</b> creates an 'Untitled' profile in the <b>Profile</b> list.</p> <p> <b>Note:</b> The new profile will be based upon the existing profile that is highlighted in the Profiles list.</p>
<b>-</b>	<p>Clicking <b>Delete -</b> removes the selected profile from the <b>Profiles</b> list.</p>

### Related topics:

[Defining an agent profile](#) on page 42

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## Audio Monitor dialog box field descriptions


The Audio Monitor dialog box helps you in verifying the statistics of microphone, speaker, and Voice-over-IP (VoIP) traffic information. In addition, it allows you to reduce the noise level being sent when you are not speaking during an active call.

 **Note:**

The VoIP statistics are available only during an active call.

The Audio Monitor dialog box contains the following controls:

Name	Description
<b>Microphone</b>	The green sound progress bar determines the strength of the audio quality connected to your personal computer.
<b>Speaker</b>	The green sound progress bar determines the strength of the speaker quality connected to your personal computer.
<b>Codec</b>	This displays a device that converts binary signals transmitted on digital networks to analog signals converted on their analog networks.
<b>Destination</b>	The progress bar displays the destination of the call. In this release, the destination will always be set to 'Not Available'.
<b>Traffic</b>	This field shows the number of congestion in the network. In this release, this will always be set to 'Not Available'.
<b>Discarded</b>	This field shows the packets that were received but discarded. In this release, the field will always display '0'.
<b>Dropped</b>	This field shows packets that were not received. In this release, this will always be set to '0'.
<b>Jitter Buffer</b>	The green status bar displays the delay of the arriving packets in milliseconds (ms). The jitter buffer temporarily stores the incoming data packets in order to minimize delay variations and sends the voice packets to the voice processor in evenly spaced intervals. There can be variations in packet arrival time due to congestion in network, drift in timing, or change in routing.
<b>Ping delay</b>	The green status bar displays the delay that a batch file will wait between two PINGS before giving a time-out.
<b>Perceived delay</b>	This field shows the network delay in receiving packets in milliseconds.
<b>Quality</b>	This field shows the percentage of packet loss will receiving packets.
<b>Silence Suppression Enabled</b>	Select the <b>Silence Suppression Enabled</b> check box if you do not want Avaya one-X Agent to transmit audio when you are not speaking. By doing so, the system reduces the total number of packets that are sent through your VoIP connection.

Name	Description
	 <b>Note:</b> You cannot enable this when you have registered Avaya one-X Agent in the My Computer mode.

**Related topics:**

[Monitoring the audio quality and VoIP traffic](#) on page 86

## Call Confirmation dialog box field descriptions

The call confirmation window appears if you have enabled the **Enable the Display confirmation window before dialing a number** option in the Dialing Rules panel.

The Call Confirmation dialog box provides the following controls:

Name	Description
<b>Phone Number</b>	The <b>Phone Number</b> field displays the number that you dialed from the <b>Text Input</b> field.
<b>Will be dialed as</b>	The <b>Will be dialed as</b> field displays the exact numbers including the dialing rules, if defined, before sending a call to the dialed number. This field also allows you to modify the number before sending a call.
<b>Do not show this message again</b>	Enable the <b>Do not show this message again</b> option if you do not want to view the message again when you dial an number in the next time. You can enable this option in the Dialing Rule panel.



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