



Avaya Aura[®] Offsite Agent User Guide

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Contents

Chapter 1: New in this release.....	5
Features.....	5
New agent log on.....	5
Support for Telecommuter mode.....	5
Other changes.....	5
Related resources.....	6
Support.....	6
Avaya Mentor videos.....	6
Chapter 2: Overview of the Offsite Agent desktop application.....	7
Prerequisites.....	7
Using Agent Desktop for Offsite Agent.....	7
Offsite Agent platform dependencies.....	8
Offsite Agent Connection Modes.....	8
Accessing the Agent Desktop application.....	9
Logging on to the contact center as an offsite agent.....	9
Using a PSTN telephone with Agent Desktop.....	10
The Agent Desktop client application.....	11
Work item paradigm.....	11
Top bar.....	11
Work list window.....	12
Action bar.....	14
User preferences.....	15
Offsite Agent dialog.....	15
Chapter 3: Offsite Agent user workflow.....	17
Chapter 4: Prepare your PC for Offsite Agent.....	19
Agent Desktop offsite configuration.....	19
Installing the Agent Desktop prerequisites.....	21
Installing Agent Desktop.....	21
Creating a shortcut to the Agent Desktop.....	22
Starting Agent Desktop.....	22
Logging on to Agent Desktop.....	23
Logging on to Agent Desktop in Telecommuter mode.....	24
Logging off from and exiting the Agent Desktop.....	26
Chapter 5: Telephony calls in Permanent Connection mode.....	29
Changing your status to Ready.....	30
Changing your status to Not Ready.....	30
Accepting a call in Permanent Mode.....	31
Declining a call in Permanent Mode.....	32
Making a call in Permanent Connection mode.....	32
Ending a call.....	33
Chapter 6: Telephony calls in On Demand mode.....	35
Changing your status to Ready in On Demand mode.....	36
Changing your status to Not Ready in On Demand mode.....	36
Accepting a call.....	36

Declining a call.....	37
Making a call in On Demand mode.....	38
Ending a call.....	39
Chapter 7: Common agent functions on Agent Desktop.....	41
Placing a call on hold.....	41
Releasing a call on hold.....	42
Using the conference feature to consult a colleague.....	42
Transferring a call.....	43
Conferencing in another agent.....	44
Conferencing in a supervisor.....	44
Calling your supervisor.....	45
Using the Emergency key.....	45
Chapter 8: Troubleshoot Agent Desktop on Offsite Agent.....	47
Prerequisites for Offsite Agent troubleshooting.....	47
I cannot get a connection to the Agent Desktop server.....	47
I am on a call but the Agent Desktop displays a new contact.....	48
Agent Desktop stops responding but my Permanent Mode connection stays up.....	48
Troubleshooting when Other Phone does not appear on the Place and receive calls using list.....	49
Index.....	51

Chapter 1: New in this release

The following sections detail what is new in the *Avaya Aura® Offsite Agent User Guide* (NN44400-120).

- [Features](#) on page 5
- [Other changes](#) on page 5

Features

See the following sections for information about feature changes.

New agent log on

The standard Avaya Aura® Agent Desktop application fully supports both onsite and offsite modes. The new log on screen allows agents to easily select whether they are working onsite or offsite. This improves the agents' ability to switch between working in the office or working at an offsite location.

Support for Telecommuter mode

In previous releases, the Offsite Agent solution was available only for contact centers using the Avaya Communication Server 1000 platform. In Release 6.2 customers have the option of configuring an offsite solution with Avaya Aura® Unified Communications platforms. This feature is called Telecommuter mode. The agent experience at the desktop is almost identical, with small differences in the behavior of the calls from the contact center to the offsite telephone.

Agents using the Unified Desktop with Avaya Call Center Elite can use the existing Call Center Elite Telecommuter Mode. If you are using Agent Desktop to work with Call Center Elite, refer to *Avaya Aura® Agent Desktop User Guide* (NN44400-114).

Other changes

There are no other changes in this document.

Related resources

Support

Visit the Avaya Support website at <http://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. On the Avaya Support website at <http://support.avaya.com>, search for notices, release notes, downloads, user guides, and resolutions to issues. Use the Web service request system to create a service request. Chat with live agents to help answer questions. If an issue requires additional expertise, agents can quickly connect you to a support team.

Avaya Mentor videos

Avaya Mentor is an Avaya-run channel on YouTube that includes technical content on how to install, configure, and troubleshoot Avaya products.

Visit <http://www.youtube.com/AvayaMentor> and do one of the following:

- Enter a key word or key words in the Search channel to search for a specific product or topic.
- Click the name of a playlist to scroll through the posted videos.

Chapter 2: Overview of the Offsite Agent desktop application

This chapter provides an overview of using Avaya Aura® Agent Desktop (AAD) for Avaya Aura® Offsite Agent (AAOA). Avaya has updated Agent Desktop to provide the functionality required by offsite agents. This update and the operating modes of Offsite Agent necessitate some different practises for agents using Agent Desktop. In addition, because new offsite agents may not be familiar with Agent Desktop, this chapter provides a basic overview of the interface.

Important:

The procedures in this book apply only to voice contacts received by offsite agents. Multimedia contact types appear to an offsite agent in exactly the same way as they do to an onsite agent. For example, the Offsite Agent connection mode has no impact on multimedia contacts.

Navigation

- [Using Agent Desktop for Offsite Agent](#) on page 8
- [The Agent Desktop client application](#) on page 11

Prerequisites

- You are familiar with basic contact center agent concepts.
- You have a working knowledge of the common Windows desktop operating systems.
- You understand how to access your corporate network over a broadband connection.

Using Agent Desktop for Offsite Agent

Important:

When using Offsite Agent, the Agent Desktop application must be used for all telephone operations for the Offsite Agent operating modes described below.

The only operations supported on the telephone set are answering and disconnecting calls.

Offsite Agent platform dependencies

Offsite Agent supports different voice contact platforms (or PABXs) the choice of which has an impact on the way in which the contact center presents voice contacts to agents.

Contact centers using Avaya Communication Server 1000 use a legacy configuration of Offsite Agent, whereas contact centers using Communication Manager use the existing Telecommuter mode of that PABX.

In general, agents using these PABX types see little difference in normal operation—the key difference is in the behavior of the Offsite Agent connection modes.

Offsite Agent Connection Modes

Offsite Agent supports two connection modes for agents, Permanent Connection and On Demand. The contact center administrator decides and configures the mode that each agent uses.

Permanent Connection on Avaya Communication Server 1000

In Permanent Connection mode on an Avaya Communication Server 1000 PABX, when you log on to the contact center, the Offsite Agent server makes a single call to your telephone number. This call remains up for the duration of your shift—you must not physically hang up the telephone (if you do accidentally hang up, Offsite Agent re-establishes the call). Offsite Agent bridges each contact center customer call through to your line.

Depending on the configuration applied by the Administrator, you either:

- hear a tone to alert you to the incoming call, which you must take (mimicking a forced call answer presentation class), or
- use the Accept button on the Agent Desktop to accept the new call

Permanent Connection on Communication Manager

In Permanent Connection mode on an Avaya Aura® Communication Manager PABX, when you log on to the contact center, Offsite Agent does not make a call to your telephone number. When the contact center routes the first voice contact to you, Offsite Agent then makes the call to your offsite number. Offsite Agent bridges each subsequent contact center customer call through to your line.

On Demand mode (either platform)

In On Demand mode the Offsite Agent server registers your login, but does not set up a call to your remote telephone. For each contact center customer call, Offsite Agent initiates a new call from the contact center PABX to your telephone. You need to physically answer the telephone to take the call.

Accessing the Agent Desktop application

When you are using Offsite Agent to connect to the contact center, you must use Agent Desktop on your offsite desktop PC or laptop. Agent Desktop allows you to log on to Offsite Agent, specify your offsite telephone number, and exercise call control over your telephone to use normal contact center agent functions. To simplify the deployment of the Agent Desktop application, the Agent Desktop server employs smart client technology to provide this desktop functionality without requiring a software install. You simply use a URL in your browser to invoke the Agent Desktop interface on your PC.

To access Offsite Agent you connect your desktop PC or laptop to your corporate network using a remote access connection. Many organizations use Virtual Private Network (VPN) connections, but the details vary between organizations. Contact your system administrator for details on accessing your corporate network from your offsite location.

Logging on to the contact center as an offsite agent

Agent Desktop is an application that agents can use both onsite and offsite. When you log on to Agent Desktop, you specify that you are offsite by selecting the Other Phone option.

These details are normally available from your Offsite Agent administrator. For ease of use, Agent Desktop stores your previous entries (other than the password).

If you are operating in Permanent Connection mode on an Avaya Communication Server 1000 PABX, the Offsite Agent server initiates a call to your PSTN telephone. When you answer this call you are connected to the contact center, but you must still log on and make yourself Ready before you can take customer calls.

If you are operating in Permanent Connection mode on a Communication Manager PABX, the Offsite Agent server does not make a call to your PSTN telephone. You must log on and make yourself Ready before you can take customer calls. The Communication Manager makes a call to your telephone when the contact center routes the first customer call to you.

If you are operating in On Demand mode, Offsite Agent immediately connects you to the contact center, and you must log on and make yourself Ready before you can take customer calls.

Using a PSTN telephone with Agent Desktop

Using a PSTN telephone with Agent Desktop introduces some new practises that you must be aware of.

In Permanent Connection mode on an Avaya Communication Server 1000 PABX, the Offsite Agent server makes a single call to your telephone number once you enter your access credentials through Agent Desktop. Offsite Agent maintains this call for the duration of your shift, and bridges each customer call that the contact center queues to you on to your telephone line.

To prevent synchronization issues if you accidentally hang up your physical telephone, Offsite Agent implements an automatic recovery. Offsite Agent re-establishes the call and you can resume your work by answering the telephone. If you were on a customer call when this occurs, Offsite Agent returns you to the same customer call (if the customer has remained on the call). Offsite Agent allows you to hang up as many as four times in a fifteen-second period. If you hang up for a fifth time within this period, Offsite Agent disconnects the call—in this case you must manually log off and exit Agent Desktop.

In Permanent Connection mode on a Communication Manager PABX (Telecommuter mode), the contact center does not always maintain a constant connection to your telephone: when Offsite Agent forwards a customer call to you, your telephone rings and you must physically answer the call on your telephone set. The contact center maintains this call to your telephone, and Offsite Agent bridges each subsequent contact center customer call through to your line. If you hang up the telephone, the contact center does not attempt to reconnect to your telephone until it queues another voice contact to you.

In On Demand mode the Offsite Agent server does not maintain a constant connection to your telephone: when Offsite Agent forwards a customer call to you, your telephone rings and you must physically answer the call on your telephone set.

You can access all available agent functions through the Agent Desktop toolbar.

When working in On Demand mode, you remain logged on to the contact center even when you hang up the offsite telephone. When working in this mode you must remember to set Not Ready if you take a non-contact center call on your telephone—otherwise Agent Desktop can attempt to connect a call to your telephone while it is busy. In such cases the Agent Desktop toolbar indicates that a call is being presented. If the administrator has implemented the call presentation class recommended by Avaya for Offsite Agent, then the call returns to the queue when it is not answered.

The Agent Desktop client application

This section introduces you to the layout and controls of the Agent Desktop client application. These are the same controls that are available to an onsite agent, but some are not supported on Offsite Agent Release 6.2, and others have modified behavior when used by an offsite agent.

Work item paradigm

The main Agent Desktop user interface is based on a work item paradigm. Each agent-to-customer interaction is a work item. Work items appear on the Agent Desktop work list. If you perform another interaction associated with that work item (for example, an IM consultation with an expert), then that interaction is displayed as part of the original work item.

The work list consists of work items and control buttons corresponding to the work item. The controls and functions change depending on the work list window behavior. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

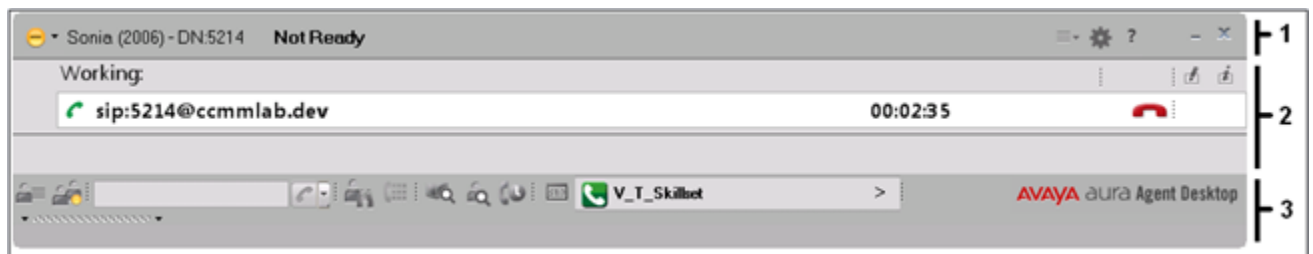


Figure 1: Example of the Agent Desktop layout

1	Top bar on page 11
2	Work list window on page 12
3	Action bar on page 14

Top bar

The Top bar appears at the top of the Agent Desktop window. The Top bar provides the system status and main controls to operate Agent Desktop.



Figure 2: Example of Top bar layout

The agent status icon appears on the top left corner of the Agent Desktop Top bar. It shows the agent status, agent name, agent login ID, and agent dialable number.

The Top bar has the following icons:

Table 1: Top bar icons

Icon	Name	Description
	Terminal action	Access Emergency, Observe and Intrinsic controls
	User preferences	Access user preferences
	Agent status	Select agent status
	Help	Access help information

Use the Terminal Action menu to perform the following tasks:

Table 2: Terminal Action menu

Command	Description
Observe	Used by supervisors or agent-supervisors to listen in on a contact—not supported on Offsite Agent.
Emergency	Immediately connect with your supervisor in case of emergency.

Work list window

The work list window contains work items and control buttons corresponding to the work item. The controls and functions change depending on the information in the work list window. The top right corner of the work list window has work item controls. These controls are common to all work items on the work list. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

The following figure shows the work list windows and controls.

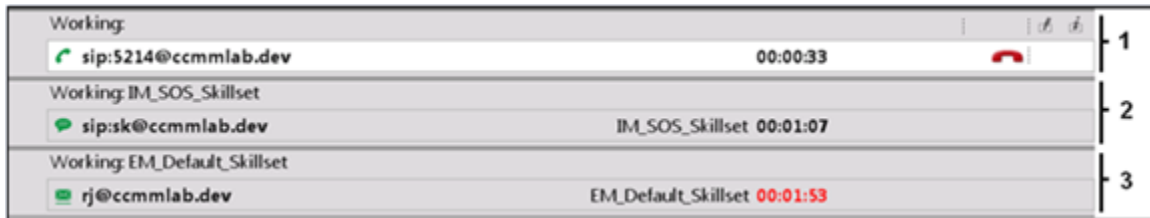


Figure 3: Example of a work list layout

The illustrated work list shows three work items:

1	A voice call work item, at the top of the work list.
2	An Instant Message (IM) work item, in the middle of the work list.
3	An e-mail work item, at the bottom of the work list. The e-mail is on hold.

- A work item is a collection of interactions with a customer, another agent, a supervisor, or an expert.
- A work list is a collection of work items. When you receive a new contact, it is added to the work list so that you can monitor your current contacts. When you finish with the contact, or reject the contact, the work item is removed from the list.

Work item controls. Each work item has a number of contact-related controls. These controls change depending on the work list window behavior and contact type.

Table 3: Examples of work item controls

Voice	IM	E-mail	Name	Description
			Accept	Accept the work item. Offsite agents use this control only in Permanent Connection mode with Accept Call configuration.
			Release	Release or reject the work item.
			Hold	Place the work item on hold.
			Transfer	Transfer the work item contact.
			Conference	Conference the work item.
			Activity code	Set the work item activity code—Activity codes are not supported on Offsite Agent.
			Work item details	Read work items details.

Only appropriate controls are displayed on work items. Voice-related controls are displayed only on a voice work item. IM related controls are displayed only on an IM work item.

Action bar

The Action bar contains global controls to create a new work item, to search contacts, and to open secondary windows. The Action bar stays at the bottom of the Agent Desktop window and remains at the bottom as the window expands.



Figure 4: Example of an Action bar layout

Use the Action bar at the bottom of the main interface to make new contacts. New voice, IM, or e-mail contacts are collectively called new work in the Work Item Paradigm.

Table 4: Action bar commands

Icon	Name	Description
	Customer Details	View customer details.
	Contact Presence	Contact presence.
	Initiate Contact	Start a new work item. When you originate a voice call as an offsite agent, you use the same dialing as you do if you are onsite. In Permanent Connection mode this function operates in the normal manner. In On Demand mode you leave the telephone on-hook when you use Originate, your telephone rings, and Offsite Agent makes the outbound call when you answer.
	Call Supervisor	Call your supervisor.
	DTMF	Generate DTMF tones.
	Contact Search	Search for contacts.
	Customer Search	Search for customers.
	Schedule Callback	Schedule callback.
	Agent Statistics	Display agent statistics scroll bar.

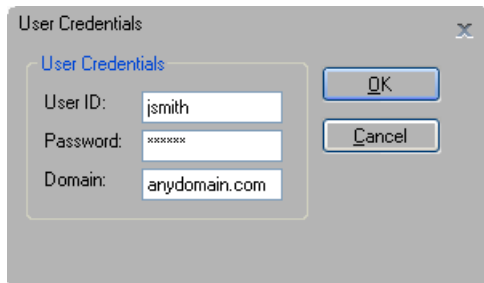
User preferences

Use the User Settings page, under the User Preferences menu, to select template locations, enable the spelling checker, define an e-mail signature, or change your password.

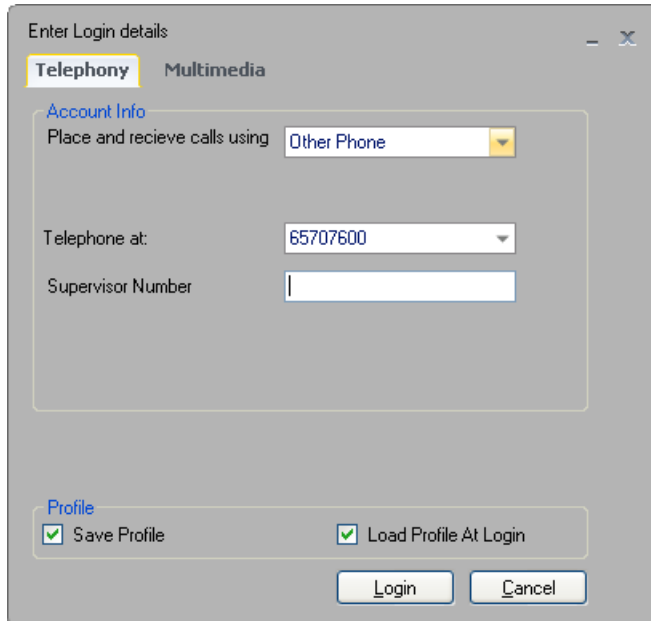
Offsite Agent dialog

In addition to the standard Agent Desktop toolbars and dialogs, Offsite Agent provides additional login and progress dialogs. These dialogs allow you to enter your access credentials to connect to the contact center and specify the remote telephone you are using for the session. The fields that are available for editing depend on the specific configuration that the Offsite Agent administrator has applied for your agent profile.

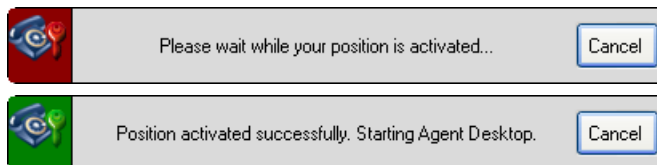
You use the User Credentials dialog to enter your access credentials to connect to the contact center. This is a two-step process, requiring that you first validate your user log on, and then specify that you are working offsite and choose your offsite phone number. Your Offsite Agent administrator provides you with your access details.

A screenshot of the 'User Credentials' dialog box. The dialog has a title bar with 'User Credentials' and a close button. Inside, there is a section titled 'User Credentials' in blue. Below this title are three text input fields: 'User ID:' containing 'jsmith', 'Password:' containing 'xxxxxxxx', and 'Domain:' containing 'anydomain.com'. To the right of these fields are two buttons: 'OK' and 'Cancel'.

When Agent Desktop validates your log on credentials, the Enter Login details dialog allows you to select Other Phone to specify that you are working off site. You can edit the existing number or select other numbers depending on the permissions that the Offsite Agent administrator has applied to your user profile. You can also enter a number at which to reach your supervisor. Agent Desktop stores the settings on this dialog and displays them as the default values at your next logon.



When you complete your log on details, Agent Desktop indicates the progress of your connection to the Offsite Agent server. You have the option of cancelling the connection.



The Agent desktop displays on the screen, in a logged-out state. To complete the Contact Center login, you select Logon from the Select Agent Status list.

Chapter 3: Offsite Agent user workflow

This chapter outlines the workflow for using the Offsite Agent packaged application as an offsite agent.

Overview of Offsite Agent user tasks

About this task

This workflow shows the high-level tasks that an offsite agent using Offsite Agent carries out. To link to any task go to [Navigation](#) on page 18

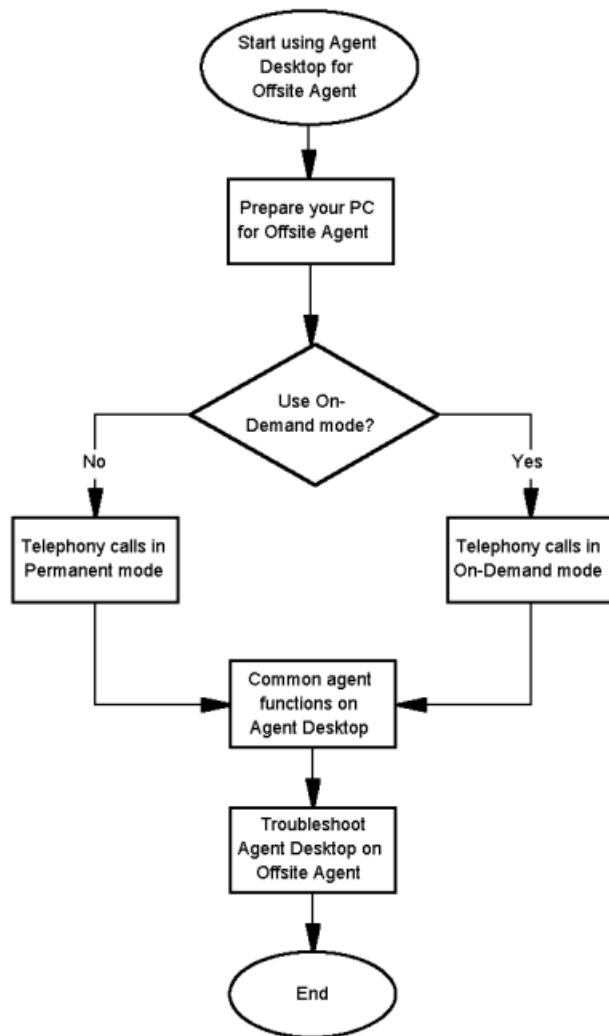


Figure 5: Offsite Agent user tasks

Navigation

- [Prepare your PC for Offsite Agent](#) on page 19
- [Telephony calls in Permanent Connection mode](#) on page 29
- [Telephony calls in On Demand mode](#) on page 35
- [Common agent functions on Agent Desktop](#) on page 41
- [Troubleshoot Agent Desktop on Offsite Agent](#) on page 47

Chapter 4: Prepare your PC for Offsite Agent

This chapter describes how to prepare an offsite PC for Offsite Agent.

Agent Desktop offsite configuration

About this task

The following figure outlines the tasks to prepare your PC to support you working as an offsite agent. To link to any task, see [Navigation](#) on page 20

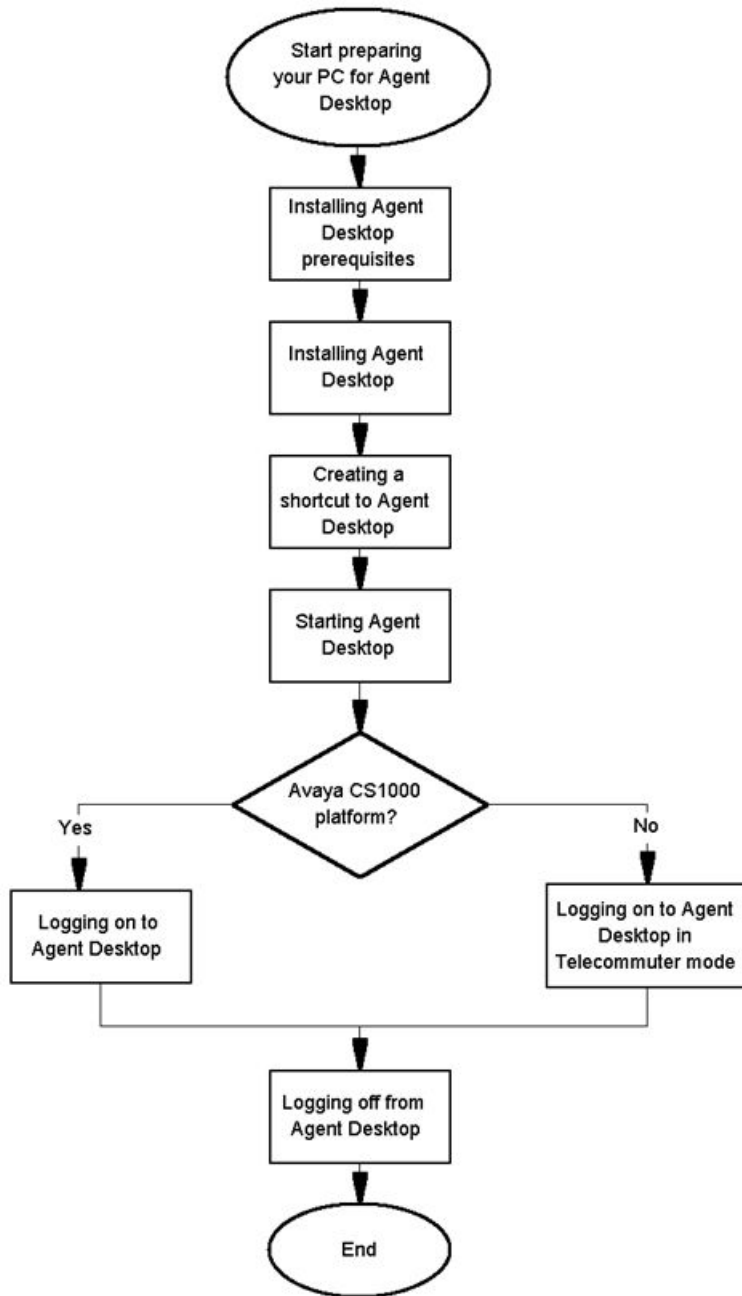


Figure 6: Agent Desktop offsite PC preparation task flow

Navigation

- [Installing the Agent Desktop prerequisites](#) on page 21
- [Installing Agent Desktop](#) on page 21

- [Creating a shortcut to the Agent Desktop](#) on page 22
- [Starting Agent Desktop](#) on page 22
- [Logging on to Agent Desktop](#) on page 23
- [Logging on to Agent Desktop in Telecommuter mode](#) on page 24
- [Logging off from and exiting the Agent Desktop](#) on page 26

Installing the Agent Desktop prerequisites

Before you begin

- Access your corporate network through your broadband connection.

About this task

Agent Desktop requires Microsoft .NET framework 3.5, Windows Installer 3.1 Redistributable (v2), Microsoft Visual C++ 2005 SP1 Redistributable Package (x86) installed on your computer. You can install these components from the Agent Desktop server.

Procedure

1. In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator for Agent Desktop. The correct URL format is <Agent Desktop servername>/agentdesktop.
 2. Click **Install Prerequisites**.
 3. Follow the on-screen instructions to complete installing the Agent Desktop prerequisites.
-

Installing Agent Desktop

Before you begin

- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit and that you have a valid User ID, Password, and Domain for use with Agent Desktop.
- Access your corporate network through your broadband connection.

About this task

Agent Desktop uses smart client technology to push the Agent Desktop client to your desktop. There is no installation program as such, you install the application by entering a URL in your

internet browser. Agent Desktop does not include a desktop icon, but it is possible to create one for ease of access.

Procedure

1. In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator for Agent Desktop. The correct URL format is <Agent Desktop servername>/agentdesktop.
 2. Click **Launch Agent Desktop**.
 3. Click **Install**.
-

Creating a shortcut to the Agent Desktop

About this task

Create a shortcut to the Agent Desktop to quickly access the application without manually entering the URL.

Procedure

1. Right click on your Windows Desktop and select **New > Shortcut**.
 2. In the **Type the location of the item** field, paste or type the HTTP address (URL) provided by your system administrator for AAAD.
 3. Click **Next**.
 4. Enter a name for the shortcut in the **Type a name for this shortcut** field.
 5. Click **Finish**.
-

Starting Agent Desktop

Before you begin

- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit and that you have a valid User ID, Password, and Domain for use with Agent Desktop.
- Access your corporate network through your broadband connection.

About this task

Use this procedure to start the Agent Desktop. The Agent Desktop install creates a listing in the Windows Programs menu for access to the Agent Desktop. You can optionally create your own desktop icon for Agent Desktop.

Procedure

Click Windows **Start** > **All Programs** > **Avaya** > **Agent Desktop**.

OR

Double-click the Agent Desktop icon you created on your Windows Desktop.

Logging on to Agent Desktop

About this task

Enter your Offsite Agent access details after you start the Agent Desktop. Depending on how the contact center administrator has set up Offsite Agent, these can include some or all of the following:

- Windows user name
- Windows password
- Windows domain
- Offsite telephone number
- Supervisor telephone number

Procedure

1. Start the Agent Desktop.
Agent Desktop displays the **Offsite Agent Logon** dialog.
2. In the **User name** box, type your Windows user name.
3. In the **Password** box, type your password.
4. In the **Domain** box, type your domain.
5. Click **OK**.
Agent Desktop displays the **Enter Login details** dialog.
6. From the **Place and receive calls using** list, select **Other Phone**.
7. From the **Telephone at** list, select the predefined offsite telephone number at which you want to take calls. If the administrator has configured it, you have the option of typing a telephone number.
8. In the **Supervisor Number** box, enter your contact center supervisor number.

9. Click **Login**.
Agent Desktop displays the progress popups, and the Agent Desktop main window appears.
10. From the Agent Status list, select **Login**.

Variable definitions

Name	Description
User ID	The username configured on Communication Control Toolkit to work with Agent Desktop. This can be your normal Windows domain username, or a specific username provided by the Offsite Agent administrator. Your administrator provides you with the correct username.
Password	The password for the user entered in the User Name field.
Domain	The Windows domain for the user entered in the User Name field. Your administrator provides you with the correct domain.
Place or receive calls using	For Offsite Agent operation, select Other Phone .
Telephone at:	Your default offsite telephone number appears in this field. Depending on your profile settings you can select a different number from the list or edit the number in this field.
Supervisor Number	The telephone number of your contact center supervisor. This must be the number as dialed from an extension on your corporate PABX.

Logging on to Agent Desktop in Telecommuter mode

Before you begin

- The administrator must configure your agent profile to allow use of the Other Phone option. Ensure the administrator has configured your other phone numbers. For more information

on configuring agent profiles, see *Avaya Aura® Contact Center Manager Administration – Client Administration* (NN44400-611).

About this task

Log on to the Agent Desktop for Call Center Elite Telephony in Telecommuter mode when you want to receive calls at an offsite location.

Log on to the Agent Desktop after you start the Agent Desktop application. When you log on, the system automatically configures your status to Not Ready. Change your status to Ready to indicate that you are available to handle all media types for which you are licensed. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Procedure

1. Start the Agent Desktop.
2. On the Agent Desktop Top bar, from the **Status** list, select **Logged Out**.
The Agent Desktop Profile window appears.
3. Type **Agent ID** and **Password**.
4. Select the appropriate **Profile**.
5. Select the **Auto Login** check box and click **OK** to automatically log on to Call Center Elite and Agent Desktop.
Or
Click **OK** to continue to log on to Call Center Elite using Agent Desktop.
6. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
7. Click the **Telephony** tab.
The Telephony tab appears with pre-populated values based on the selected profile.
8. Select **Other Phone** from the **Place and receive calls using** drop-down list.
The **Telephone at** drop-down list appears.
9. Enter your **Extension** and **Password**.
10. From the **Telephone at** list, select the predefined offsite telephone number at which you want to take calls. If the administrator has configured it, you have the option of typing a telephone number.
11. Under Elite ACD, select the **Login to Elite** check box.
12. Type your Call Center Elite **Username** and **Password**.
13. If you are configured to handle Multimedia contacts (such as e-mail), in the **Multimedia** tab, type your **ID** and **Password**.
14. Click **Login**.
The Agent Login progress bar appears and your offsite telephone number rings.

15. Answer your offsite telephone for your logon to complete.
-

Variable Definitions

Name	Description
<i>Extension</i>	The extension number appears in the Extension box, based on your configuration.
<i>Password</i>	The password for the extension.
<i>Telephone at</i>	The list of predefined offsite telephone numbers configured in the agent profile.
<i>Server Address</i>	The server address of the telephony switch.
<i>License Type</i>	The Contact Center license type.
<i>Login to Elite</i>	Allows you to login to Call Center Elite ACD.
<i>Username</i>	Your Call Center Elite ACD username appears in the Username box, based on the selected profile.
<i>Password</i>	Password of Elite ACD.
<i>ID (Multimedia)</i>	Your logon ID appears in the ID box, based on your Communication Control Toolkit configuration.
<i>Password (Multimedia)</i>	Initially, for multimedia agents, your password is the same as your Agent Logon ID. The system verifies your password and logs you on to the Agent Desktop application. The Logged Out button changes to Logged In .

Logging off from and exiting the Agent Desktop

Before you begin

Ensure that you do not have a contact open. If a contact is open, you must close it before you log off of the application.

About this task

Log off from the Agent Desktop when you are ready to exit the application.

Procedure

1. From the Agent Status list, select **Log Out**.
The top bar displays a Logged Out status message.
 2. Click **Close**.
 3. Click **Yes**.
Agent Desktop closes.
-

Prepare your PC for Offsite Agent

Chapter 5: Telephony calls in Permanent Connection mode

This chapter describes tasks that are specific to handling incoming telephone calls from customers on an offsite Avaya Aura® Agent Desktop in Permanent Connection mode. For tasks that are common to both Offsite Agent operating modes, see [Common agent functions on Agent Desktop](#) on page 41.

You can use the Agent Desktop to perform the following telephone tasks:

- change your status to Ready or Not Ready
- originate calls
- end calls

In Permanent Mode on an Avaya Communication Server 1000 PABX, the Offsite Agent server creates a nailed-up connection to your offsite telephone when you log on. You must not use the physical telephone for any functions. However, if you do accidentally hang up your physical telephone, Offsite Agent immediately re-establishes your connection by calling your phone. To resume working you merely answer the call. If you are on a customer call when this occurs, Offsite Agent connects you back into the customer call (if the customer has remained in the call).

When using Telecommuter mode on an Avaya Aura® Communication Manager PABX, the Offsite Agent server does not place a call to your offsite telephone when you log on. Only when Avaya Aura® Contact Center (AACC) routes a voice call to you does the server place the call to your telephone. You must not use the physical telephone for any functions. This call stays active if you do not hang up after speaking to the customer, but if you do hang up then the Offsite Agent server does not re-establish a call to your telephone until AACC routes another call to you. As a result, when using Telecommuter mode, it is not critical to avoid hanging up the telephone. However, if your contact center uses Force Call Answer, then the first call after you hang up does not force answer, and you must accept the call on the Agent Desktop.

You must use the Agent Desktop work list to invoke all agent functions, including End Call.

There are two configurations of Permanent Connection mode:

- Forced Answer
- Accept Call

If the Administrator configures Forced Answer, you do not need to take any action to answer calls. When the contact center routes a call to you, the Offsite Agent server bridges this on to your nailed-up connection. Offsite Agent plays a tone to alert you to the incoming call, and then immediately connects you with the customer. The Agent Desktop automatically updates the work list with the call status and details.

If the Administrator configures Accept Call, you are able to accept or reject a call using Agent Desktop. When the contact center routes a call, you are able to accept or reject the call using a standard voice contact work item.

Navigation

- [Changing your status to Ready](#) on page 30
- [Changing your status to Not Ready](#) on page 30
- [Accepting a call in Permanent Mode](#) on page 31
- [Declining a call in Permanent Mode](#) on page 32
- [Making a call in Permanent Connection mode](#) on page 32
- [Ending a call](#) on page 33

Changing your status to Ready

About this task

When you connect to Offsite Agent and log on to the contact center, by default your status is Not Ready. Change your status to Ready when you are available to receive contacts.

Procedure

From the **Agent Status** list, select **Go Ready**.
Offsite Agent places you in *Ready* status. The top bar displays a Ready status message.

Changing your status to Not Ready

About this task

Change your status to Not Ready when you are temporarily unavailable to take calls. If your contact center uses an Avaya Communication Server 1000 PABX, you cannot enter a reason code in Offsite Agent.

Procedure

From the **Agent Status** list, select **Go Not Ready**.

Offsite Agent places you in *Not Ready* status. The top bar displays a Not Ready status message.

Accepting a call in Permanent Mode

Before you begin

! Important:

Depending on the capacity of your broadband connection and latency in the PSTN network, it is possible that the Agent Desktop response to an incoming call does not synchronize with the telephone ringing. Therefore you can be able to talk to a customer before Agent Desktop updates with the call status and information.

About this task

If your contact center administrator has configured Forced Answer, you do not need to take any specific action to answer calls in Permanent Connection mode. Customer calls automatically connect to your telephone on the nailed-up connection. Offsite Agent plays a tone to alert you to the incoming call before it activates the speech path. Agent Desktop automatically updates the call status. However, if you are using Telecommuter mode and you previously disconnected from a call by hanging up your telephone, Offsite Agent cannot force answer the call: you must manually accept the call.

If your contact center uses Accept Call for Offsite Agent, Agent Desktop displays a normal voice contact work item, allowing you to choose to accept or reject the call.

Procedure

When you hear the Offsite Agent call alert on your phone, commence speaking with the customer.

OR

Click **Accept** on the voice contact work item and commence speaking with the customer.

Declining a call in Permanent Mode

Before you begin

Important:

If your Administrator has configured Call Force, you can reject a call only prior to hearing the incoming call tone on your telephone. This is possible only if your Agent Desktop client alerts you to the incoming call before you hear the tone.

About this task

Decline a call if you want to reject the contact and place it back in the queue. The contact center then queues the contact to another agent and your status becomes Not Ready. You cannot receive new incoming contacts until you change your status to Ready.

Procedure

If the call appears on the Agent Desktop application, click **Release** on the call work item.

OR

Click **Release** on the voice contact work item window.

Making a call in Permanent Connection mode

Before you begin

Important:

If you have an active customer call on your set, you cannot originate another call. If you want to consult with a supervisor or another agent, then you must use the conference feature.

About this task

Make a call using the Agent Desktop. Ensure that you follow the correct steps based on the type of telephone number you want to call:

- a new external telephone number
- a new internal telephone number

Procedure

1. On the action bar, click **Initiate Call**.
2. In the text box to the left of Initiate Call, enter the phone number to dial.

3. Click **Initiate Call** again.
Offsite Agent dials the phone number. Offsite Agent adds a new work item to the work list and the call timer on the work item starts to increment.
 4. Click **Release** on the call work item when you complete the call.
-

Ending a call

About this task

End a call when a call is completed. If you were in Ready status before the call, you automatically return to Ready when you terminate the call. If you require time to perform call wrap-up tasks before you accept another call, change your status to Not Ready.

Procedure

- Click **Release** on the call work item.
-

Chapter 6: Telephony calls in On Demand mode

This chapter describes tasks specific to handling customer calls on an offsite Avaya Aura® Agent Desktop in On Demand mode. For tasks that are common to both Offsite Agent operating modes, see [Common agent functions on Agent Desktop](#) on page 41.

When using Offsite Agent in On Demand mode the following telephone tasks have some differences from normal onsite operation:

- Changing your status to Ready or Not Ready.
- Accepting and declining incoming contacts.

In On Demand mode you log on to Offsite Agent without taking your offsite telephone off hook, and you use the Agent Desktop controls to make yourself Ready or Not Ready. The Offsite Agent server creates a new call to your offsite telephone for each customer call that Contact Center Manager Server routes to you. Your telephone rings, and Agent Desktop displays the call status and details. However, you accept the call only by lifting your telephone handset.

If you need to use your offsite telephone to take a non-contact center call, or to make a personal call, you must remember to make your status Not Ready on Agent Desktop. If you remain in Ready status when your telephone is busy on a non-contact center call, Offsite Agent can attempt to route a customer call to you. In such cases the Agent Desktop toolbar indicates that a call is being presented. If the administrator has implemented the call presentation class recommended by Avaya for Offsite Agent, then the call returns to the queue when it is not answered.

When you receive a call on your telephone that is not a customer call, Offsite Agent cannot flag this. Agent Desktop can display call status and information only for contact center calls.

Navigation

- [Changing your status to Ready in On Demand mode](#) on page 36
- [Changing your status to Not Ready in On Demand mode](#) on page 36
- [Accepting a call](#) on page 36
- [Declining a call](#) on page 37
- [Making a call in On Demand mode](#) on page 38
- [Ending a call](#) on page 39

Changing your status to Ready in On Demand mode

About this task

When you connect to Offsite Agent and log on to the contact center, by default your status is Not Ready. Set your status to Ready when you are available to receive customer calls.

Procedure

From the **Agent Status** list, select **Go Ready**.

Offsite Agent places you in *Ready* status. The top bar displays a Ready status message.

Changing your status to Not Ready in On Demand mode

About this task

Change your status to Not Ready when you are temporarily unavailable to take calls. In On Demand mode you must do this if you use your offsite telephone for non-contact center calls (for example, receiving a personal call).

If your contact center uses an Avaya Communication Server 1000 PABX, you cannot enter a reason code in Offsite Agent.

Procedure

From the **Agent Status** list, select **Go Not Ready**.

Offsite Agent places you in *Not Ready* status. The top bar displays a Not Ready status message.

Accepting a call

Before you begin

Important:

Depending on the capacity of your broadband connection and latency in the PSTN network, it is possible that the Agent Desktop response to an incoming call does not synchronize with the telephone ringing.

! Important:

Offsite Agent cannot flag non-contact center calls on your telephone: when you answer a non-contact center call, you must remember to set your status Not Ready on Agent Desktop.

About this task

Accept telephone calls by lifting the handset on your telephone. (When used for Offsite Agent on an Avaya Communication Server 1000 PABX, Agent Desktop greys out the Accept button. On a Communication Manager PABX, the Accept button remains available, but you must not use it.)

Procedure

1. When your telephone rings, answer the call by lifting the handset of your telephone.
 2. If it is a customer call, Agent Desktop updates the display with call information.
 3. If it is not a customer call, from the Agent Status list select **Go Not Ready**. Offsite Agent places you in *Not Ready* status. The top bar displays a Not Ready status message.
-

Declining a call

Before you begin**! Important:**

Depending on the capacity of your broadband connection and latency in the PSTN network, it is possible that the Agent Desktop response to an incoming call does not synchronize with the telephone ringing. If the Agent Desktop response is later than the telephone ringing you cannot make a decision on whether the call is from the contact center or another source.

About this task

Decline a call if you want to reject the contact and place the contact back in the queue. The contact is then queued to another agent and your status becomes Not Ready. You cannot receive new incoming contacts until you change your status to Ready.

Procedure

1. If the call appears on the Agent Desktop application, click **Release** on the call work item.
 2. Alternatively, if the call rings on the telephone, do not pick up the handset.
-

Making a call in On Demand mode

Before you begin

Important:

If you have an active customer call on your set, you cannot originate another call. If you want to consult with a supervisor or another agent, then you must use the conference feature. See [Using the conference feature to consult a colleague](#) on page 42.

About this task

Make a call using the Agent Desktop. When working in On Demand mode, if you make a call by using the Agent Desktop, it has the following results:

- the Offsite Agent server makes a call to your offsite phone and bridges it to the phone number you want to call
- you show up on your supervisor's Real Time Display, and on subsequent reports, as being on a DN call
- you do not need to make yourself Not Ready
- the contact center pays the call tariff

Ensure that you follow the correct steps based on the type of telephone number you want to call:

- an external telephone number
- an internal telephone number

Procedure

1. On the **Action bar**, click **Initiate Call**.
 2. In the text box to the left of Initiate Call, enter the phone number to dial.
 3. Click **Initiate Call** again.
Offsite Agent dials the phone number, and initiates a call to your telephone. Offsite Agent adds a new work item to the work list and the call timer on the work item starts to increment.
 4. Answer the call by taking your telephone off hook.
 5. Click **Release** on the call work item when you complete the call.
-

Ending a call

About this task

End a call when you have finished speaking with the customer. If you require time to perform call wrap-up tasks before you accept another call, change your status to Not Ready.

Procedure

Hang up your telephone or click **Release** on the call work item.

Telephony calls in On Demand mode

Chapter 7: Common agent functions on Agent Desktop

This chapter describes how to work with active calls on an offsite Avaya Aura® Agent Desktop. These actions are the same whether you are working in Permanent Connection or On Demand mode. They are identical to those for onsite agents using Agent Desktop.

Navigation

- [Placing a call on hold](#) on page 41
- [Releasing a call on hold](#) on page 42
- [Using the conference feature to consult a colleague](#) on page 42
- [Transferring a call](#) on page 43
- [Conferencing in another agent](#) on page 44
- [Conferencing in a supervisor](#) on page 44
- [Calling your supervisor](#) on page 45
- [Using the Emergency key](#) on page 45

Placing a call on hold

About this task

Place a call on hold to interrupt your current call. When you want to speak to the caller again, release the call from hold.

The contact timer on the work item changes to orange characters while the work item is on hold.

Procedure

On the work item, click **Hold**.

The call is placed on hold, the contact timer color changes to orange, and the *Hold* button changes to *Unhold*.

Releasing a call on hold

About this task

Release a call that you placed on hold when you want to speak to the caller again.

Procedure

On the work item, click **Unhold**.

The call is taken off hold, the contact timer color changes to green, and the *Unhold* button changes to *Hold*.

Using the conference feature to consult a colleague

Before you begin

- You are on a customer call.
- You know the number of the person you want to consult.

About this task

In an onsite contact center, you frequently use the Hold feature to temporarily hold a customer call while you consult a colleague. This consult can be speaking to someone at the next desk, or using your personal line on the telephone to place a call to an expert.

When you are offsite and using a single line telephone, you are not able to place a call on hold and then originate another call.

To temporarily hold a customer call and consult a colleague, use the Conference feature on Agent Desktop.

Procedure

1. On the work item, click **Conference** to place the customer on hold and open the Conference window.
2. In the Conference window, in the **Number** box, type the number of the agent to conference into the call.
3. Click **OK** to begin the conference.
The Conference and Unhold buttons flash.

4. When you have finished speaking to the person you have consulted, click **Unhold**. Agent Desktop terminates the consult call and returns you to the customer call.
-

Transferring a call

About this task

You can transfer a call to another agent in your contact center. You can perform a supervised transfer or a blind transfer. In a supervised transfer, the call is placed on hold, and you speak to the third party before completing the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

Important:

The blind transfer option on Agent Desktop toolbar is greyed out in a SIP-enabled contact center. However you can complete the transfer before the third party answers the call (simulate a blind transfer) using the steps in this procedure.

Procedure

1. On the telephony toolbar, click **Transfer**.
 2. In the Transfer window, **Supervised Transfer** is automatically selected.
 3. In the **Number to Transfer** box, type the number to which you want to transfer the call.
If you want to perform a Blind Transfer on a SIP-enabled contact center, click **OK** before the third party answers the call.

If you select **Supervised Transfer**, the active call is placed on hold and a call is placed to the third party. While you speak with the third party, the Transfer and Hold buttons both flash to indicate that you have a customer on hold and that you must complete the transfer by pressing the Transfer button.
 4. Click **OK**.
The call is transferred to the third party and is dropped from your telephone. The call timer stops.
-

Conferencing in another agent

About this task

Conference in another agent if you want to speak to your customer and another agent from the contact center.

Procedure

1. On the work item, click **Conference** to place the customer on hold and open the Conference window.
 2. In the Conference window, in the **Number** box, type the number of the agent to conference into the call.
 3. Click **OK** to begin the conference.
 4. Speak with the agent, if necessary, before you conference in the customer.
 5. Click **Conference** again to take the customer off hold and conference in the customer and the other agent.
-

Conferencing in a supervisor

Before you begin

- You entered a number for your supervisor when you logged on to Agent Desktop.

About this task

Conference in a supervisor if you want to speak to your customer and your contact center supervisor.

Procedure

1. On the **Agent Desktop Action bar** menu, click **Supervisor** to place the customer on hold and conference in your supervisor.
 2. Speak to your supervisor, if necessary, before you conference in the customer.
 3. Click **Supervisor** again to take the customer off hold and conference in the customer and your supervisor.
-

Calling your supervisor

Before you begin

- You entered a number for your supervisor when you logged on to Agent Desktop.

About this task

You can call your supervisor if you are not currently handling a call.

To call a supervisor when you are on a call, see [Conferencing in a supervisor](#) on page 44.

Procedure

On the **Action bar**, click **Call Supervisor**.

Using the Emergency key

About this task

Use the Emergency key if you require immediate assistance from your contact center supervisor while handling a call. For example, if you talk to a customer who suddenly threatens you, you may want to add your supervisor to the call immediately. On Offsite Agent the emergency key initiates a conference in the same way as conferencing your supervisor.

Procedure

1. On the Agent Desktop Top bar menu, click **Emergency** to place the customer on hold and conference in your supervisor.
 2. Speak to your supervisor, if necessary, before you conference in the customer.
 3. Click **Emergency** again to take the customer off hold and conference in the customer and your supervisor.
-

Chapter 8: Troubleshoot Agent Desktop on Offsite Agent

This chapter describes how to troubleshoot faults that may occur in Agent Desktop when it is used on an offsite PC.

Prerequisites for Offsite Agent troubleshooting

- Ensure you have correctly installed the Agent Desktop client.
- Ensure that your broadband connection is operational.

Navigation

- [I cannot get a connection to the Agent Desktop server](#) on page 47
- [I am on a call but the Agent Desktop displays a new contact](#) on page 48
- [Agent Desktop stops responding but my Permanent Mode connection stays up](#) on page 48
- [Troubleshooting when Other Phone does not appear on the Place and receive calls using list](#) on page 49

I cannot get a connection to the Agent Desktop server

About this task

This procedure describes things to check if you cannot connect to the Agent Desktop server using the URL supplied by your administrator.

Procedure

1. Check whether your broadband connection is up and you can access general Internet sites, for example, www.avaya.com.

2. Check whether you can connect to other servers in your corporate domain, for example, the corporate e-mail server.
 3. If your broadband connection is working and you can connect to other servers in your corporate domain, contact the Offsite Agent administrator for assistance.
-

I am on a call but the Agent Desktop displays a new contact

About this task

This procedure describes the actions to take if you receive a contact notification on the Agent Desktop while you are already on a call. The most likely cause if you are in On Demand mode is that you have taken or made a non-contact center call using your telephone, but did not make yourself Not Ready.

Procedure

1. Check whether you are in Ready state.
 2. From the Agent Status list, select **Go Not Ready** to change your status to Not Ready.
-

Agent Desktop stops responding but my Permanent Mode connection stays up

About this task

This procedure describes the actions to take if your Agent Desktop stops responding but your Permanent Mode call stays up. The most likely cause of this situation is a loss of connection between your desktop computer and the Agent Desktop server.

You need to disconnect your permanent mode call by exceeding the Permanent Mode hang-up limit of five hang-ups in fifteen seconds.

Procedure

1. Hang up your telephone. The Offsite Agent application immediately rings your telephone again.
2. Answer your telephone and hang up.

3. Repeat the previous step four more times within a fifteen-second period to fully disconnect from Offsite Agent.
 4. Exit the Agent Desktop application, and restart it.
 5. If you cannot connect to your Agent Desktop server, contact your contact center Administrator for guidance.
-

Troubleshooting when Other Phone does not appear on the Place and receive calls using list

About this task

This procedure describes what the agent does if the Other Phone option does not appear as one of the options on the Place and receive calls using list.

Procedure

Contact your administrator to verify that a phone number has been added to the agent profile.

Index

A

about Agent Desktop[7](#)
agent functions[41](#)
Avaya Mentor videos[6](#)

C

call on hold[41](#)
Communication Manager[8](#), [9](#)
conference feature[42](#)
conferencing[44](#)
creating a shortcut[22](#)

D

declining a call[32](#)
desktop application[7](#)
displays a new contact[48](#)

E

Emergency key[45](#)
exiting the Agent Desktop[26](#)

I

initiate call[38](#)
install prerequisites[21](#)

L

Launch Agent Desktop[21](#)
logging on to Agent Desktop[24](#)

Telecommuter mode[24](#)
logging on to Agent Desktop Telecommuter mode[26](#)
variable definitions[26](#)

O

Offsite Agent dialog[15](#)
Offsite Agent troubleshooting[47](#)
on demand mode[9](#), [36](#)

P

permanent connection[8](#)
permanent mode[32](#)
platform dependencies[8](#)

R

Ready status[30](#)
related resources[6](#)
 Avaya Mentor videos[6](#)
release[37](#)

S

support[6](#)
 contact[6](#)

T

Telecommuter mode[5](#), [24](#)
 logging on to Agent Desktop[24](#)
telephony calls[35](#)
transferring a call[43](#)
Troubleshooting[49](#)
 Other phone does not appear[49](#)

V

variable definitions[26](#)
 logging on to Agent Desktop Telecommuter mode [26](#)
videos[6](#)
 Avaya Mentor[6](#)

W

Work list window[12](#)

