



Avaya Aura[®] Agent Desktop

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Chapter 1: Introduction

Avaya Aura® Agent Desktop is a single-interface client application used to interact with customers. You can respond to customer contacts through a variety of media, including phone, outbound contacts, e-mail, Web communication, instant messaging, fax, scanned documents, and Short Message Service (SMS) text messages. Agent Desktop provides automation for customer responses to eliminate repetitive actions, such as typing a common response in an e-mail message.

Agent Desktop supports the following contact types:

- Voice contacts
- E-mail messages
- Outbound contacts
- Web communications contacts
- Instant Messages
- SMS text messages
- Fax messages
- Scanned documents
- Voice mail messages

Your administrator determines which type of contacts you can handle.

Agent Desktop uses Microsoft .NET Framework 3.5 Click Once Deployment technology, which means that you can install and start the application by entering a URL address in Windows Explorer or Internet Explorer.

Prerequisites

- Ensure that you review the Contact Center installation procedures.
- Supported Operating Systems:
 - Windows XP Professional SP2 or later
 - Windows Vista SP2 or later
 - Windows 7 (32 bit and 64 bit) Ultimate and Enterprise editions
- Ensure that the following are installed on the client machine:

- Microsoft Internet Explorer 7.0 or later
- Microsoft .NET Framework 3.5
- Windows Installer 3.1 Redistributable (v2)
- Microsoft Visual C++ 2005 SP1 Redistributable Package (x86)

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: New in this release

The following sections detail what is new in the *Avaya Aura® Agent Desktop User Guide* (NN44400-114) Release 6.2.

- [Features](#) on page 11

Features

See the following sections for information about feature changes:

- [Agent Greeting](#) on page 11
- [Support for Avaya Aura® Presence Services](#) on page 12
- [Support for Avaya Aura® Call Center Elite](#) on page 12
- [Support for Web Communications transfer to a skillset](#) on page 13
- [Barge-in on a chat session](#) on page 13
- [Observe a chat session](#) on page 12
- [Phone book](#) on page 13
- [Inline images in e-mail](#) on page 13
- [Audio Monitor](#) on page 13
- [Voice call history](#) on page 13

Agent Greeting

The Agent Greeting feature allows agents to pre-record greetings. The system plays the greeting automatically when an agent answers a call.

Agent Greeting has the following additional benefits:

- the agent greeting is consistent for all callers
- the agent gets time to prepare for the call
- the agent can customize the greeting according to the time of the day. For example, agents can customize the greetings to play at specific times during morning, afternoon or evening

Support for Avaya Aura® Presence Services

Avaya Aura® Contact Center Release 6.2 provides integration with Avaya Aura® Presence Services in a SIP-enabled contact center.

Presence is information that conveys a person's ability and willingness to communicate across a set of services, such as telephony and instant messaging. States such as “available” and “away” characterize a person's presence. These states impact the individual's ability and availability to communicate with other users.

Presence Services is a single point of presence collection. It supports presence information gathering from a diverse range of sources. Presence Services aggregate this information on a per user basis, and make it available to Avaya Aura® Agent Desktop.

Presence Services enables Agent Desktop to display presence information for the Agent, Supervisor, and Expert, through Contacts Presence.

Contacts Presence provides click-to-call and click-to-chat functionality to instantly place a call or send an instant message to an agent. You can also see the agent's phone status whether it is On-hook, Off-hook, or On a call, if a contact in the list is using a Presence/IM client, which publishes its phone state. However, not all supported client software publish this information. You can view additional information about an agent if the agent is using Agent Desktop.

Support for Avaya Aura® Call Center Elite

Avaya Aura® Contact Center Release 6.2 provides a single-interface client application to handle voice calls from both, Avaya Aura® Contact Center (SIP or AML) or Avaya Aura® Call Center Elite, through a desktop phone or softphone.

This allows you to handle voice calls and multimedia contacts from one single integrated Agent Desktop.

Observe a chat session

An agent-supervisor can observe an agent-customer chat session. When an agent-supervisor start observing a web chat, the agent receives a notification that an agent-supervisor is observing the contact. The agent can continue the conversation without interference from the agent-supervisor. The customer does not receive a notification and is not aware that an agent-supervisor is observing the contact.

Barge-in on a chat session

An agent-supervisor can participate in an agent-customer chat session.

Support for Web Communications transfer to a skillset

You can transfer a Web Communications (WC) contact to a skillset.

 Important:

You cannot transfer a contact to a skillset that does not have active agents.

Phonebook

The Phone book allows you to contact agents through the Lightweight Directory Access Protocol (LDAP) agent contact directory. You can search for contacts, make calls, or send e-mail messages to contacts in the Phone book.

Inline images in e-mail messages

Inline attachments display complete information within the body of the e-mail. This makes the information easily accessible to customers, even without explicitly opening the attachment. For example, you can add a company logo as an inline image to increase brand awareness.

Audio Monitor

The Audio Monitor window helps you in verifying the statistics of microphone, speaker, and Voice-over-IP (VoIP) traffic information. Use the Audio Monitor dialog box to determine the audio quality if the quality of your VoIP communications degrades.

Voice call history

The Customer Details window shows a history of all past voice calls for a contact. The **History** tab lists the voice calls in reverse chronological order, that is the latest calls appear higher in the call list.

New in this release

Chapter 3: Agent Desktop User Interface

Use Agent Desktop to handle voice, e-mail, outbound, Web communications, instant messaging, voice mail, fax, scanned documents, and SMS text message contacts. Use Agent Desktop in the following situations:

- to handle voice contacts when Agent Desktop is installed on a Communication Control Toolkit (CCT) server
- to handle voice contacts, outbound contacts (voice calls from you to customers), e-mail messages, or Web communications contacts when Agent Desktop is installed on a Contact Center Multimedia (CCMM) server
- to work with Avaya Aura® Presence Services server or Microsoft Office Communications Server to handle instant messaging in a SIP-enabled Contact Center

This chapter describes the main user interface of the Agent Desktop application. There are three main sections to the Agent Desktop user interface:

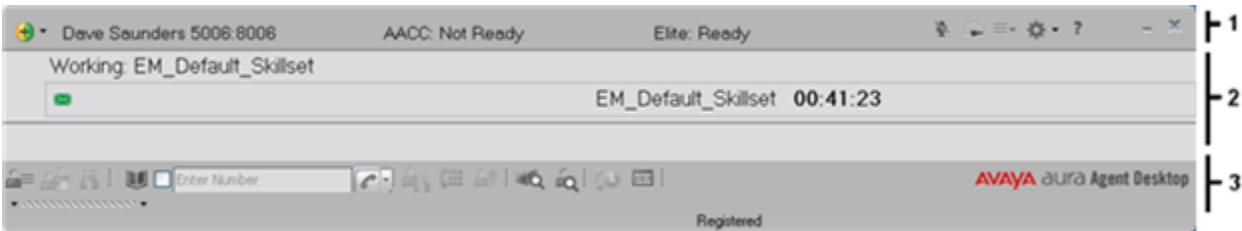


Figure 1: Example of Agent Desktop layout

1	Top bar on page 16
2	Work list window on page 17
3	Action bar on page 18

The Agent Desktop also provides other controls and menus that are explained in the following chapters.

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 Instant Message (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.

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 the Agent Desktop.

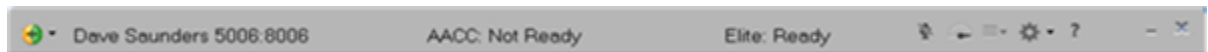


Figure 2: Example of Top bar layout

The agent status icon appears on the top left corner of the Agent Desktop Top bar. In case of Elite integration, the status icon is split in half, the left half displays the status for receiving Multimedia contacts (Contact Center) and the right half displays the status for receiving Voice contacts (Elite). For example, in the image, the status icon is set to orange in the left half and green in the right half, which means that the agent is not ready to receive Multimedia contacts but is ready to receive Voice contacts.

The Top bar also displays the agent status, agent name, agent login ID, and dialable number of the agent.

The Top bar has the following icons:

Table 1: Top bar icons

Icon	Name	Description
	Mute/Unmute	Place the call on mute while using the computer (softphone) to place and receive calls. Use the same button to unmute.
	Audio Monitor	View the current audio levels used for your microphone and speakers.
	Terminal Actions	Access Emergency and Intrinsic controls.
	User preferences	Access user preferences and change audio settings for the softphone.
	Agent status	Select agent status.
	Help	Access help information.

Use the Terminal Action menu to perform the following tasks:

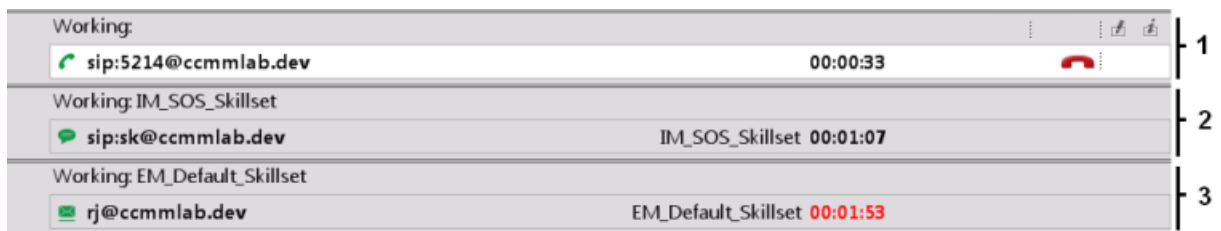
Table 2: Terminal Action Menu

Command	Description
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, the 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 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.

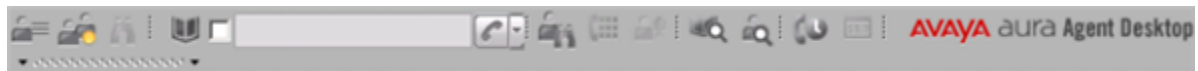
Table 3: Examples of work item controls

Voice	IM	E-mail	Name	Description
			Accept	Accept the work item.
			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.
			Work item details	Read work items details.

Only appropriate controls are displayed on work items. Voice-related controls are displayed on voice work items. IM-related controls are displayed on IM work items.

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 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.
	Contacts Presence	Contact presence.
	Observe	Listen in or participate in agent-customer calls or chat sessions. (Used by agent-supervisors only)

Icon	Name	Description
	Phonebook	Contact agents through the LDAP agent contact directory.
	Originate Call	Start a new work item.
	Supervisor	Call your supervisor.
	DTMF	Generate Dual-tone Multi-frequency (DTMF) tones.
	Agent Greeting	Used to record an agent greeting.
	Contact Search	Search for contacts.
	Customer Search	Search for customers.
	Schedule Callback	Schedule a callback.
	Agent Statistics	Display the agent statistics scroll bar.
	Trunk Access	Number to access a trunk, generally 9.

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.

Use the Audio Settings page, under the **User Preferences** menu, to adjust playback and record volume and select playback and record devices, while using the computer (softphone) to place and receive calls.

Chapter 4: Using your Agent Desktop

This chapter describes how to install and configure Avaya Aura® Agent Desktop.

Installing the Agent Desktop

Before you begin

- Ensure that the administrator has configured your Windows User ID in the Communication Control Toolkit (CCT) and that you have a valid user ID, password, and domain to use with the Agent Desktop. You must also ensure that the client is joined to the appropriate domain before you use the Agent Desktop.

About this task

Install the Agent Desktop, if you are starting the application for the first time, or if you are starting the application following installation of an upgrade or a patch.

Procedure

1. In Windows Explorer or Internet Explorer, type the HTTP address (URL) provided by your system administrator.
The URL format is <Contact Center MultiMedia Servername>/agentdesktop. If you do not use the multimedia functionality then the URL is <Communication Control Toolkit servername>/agentdesktop.
 2. Click **Launch Agent Desktop**.
 3. Click **Install**.
-

Starting the Agent Desktop

Before you begin

- Ensure that you install Agent Desktop. See [Installing the Agent Desktop](#) on page 21.
- Ensure that the administrator has configured your Windows User ID in the Communication Control Toolkit (CCT) and that you have a valid user ID, password, and domain for use with Agent Desktop.

*** Note:**

Agent Desktop supports local or domain users for agents, but supports only domain users for supervisors.

! Important:

If your contact center uses an Avaya Aura® Communication Manager, Avaya Aura® Agent Desktop client computers do not support the following applications running concurrently with Avaya Aura® Agent Desktop:

- Avaya one-X® Communicator
- IP Agent
- IP Softphone
- Any other non-Avaya softphone applications
- Avaya one-X Agent. In a Multimedia-only Contact Center deployment, where the Contact Center agents are configured for Multimedia contact types only, running Avaya Aura® Agent Desktop concurrently with Avaya one-X Agent on a client computer is supported.

About this task

Start the Agent Desktop when you are ready to open the application.

Procedure

1. In Windows Explorer or Internet Explorer, type the HTTP address (URL) provided by your system administrator.

The URL format is <Contact Center MultiMedia Servername>/agentdesktop. If you do not use the multimedia functionality then the URL is <Communication Control Toolkit servername>/agentdesktop.

2. Click **Launch Agent Desktop**.

OR

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

The Agent Desktop toolbar appears. If a CCT Connection Failure message appears stating the automatic login to CCT using your Windows logon identity failed, your Windows User ID is not configured on CCT. Click **Retry** to enter valid User Credentials or click **Cancel** to exit the application.

Procedure job aid

If you log on to the Agent Desktop to handle Predictive Outbound contacts, a delay can occur before you can log on to the required applications. If the delay occurs after the agent logs on to Contact Center Manager Server or Contact Center Multimedia, and before logging on to the

Predictive Outbound skillset, ensure that CPSEE Application server name is in the hosts file of the client machine.

Creating a shortcut to the Agent Desktop

Before you begin

- Ensure that you install Agent Desktop. See [Installing the Agent Desktop](#) on page 21.

About this task

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

Procedure

1. Click **Start > Programs > Avaya**.
 2. Right-click **Agent Desktop**.
 3. Select **Send To > Desktop (create shortcut)**.
-

Logging on to Agent Desktop when using a desktop phone

About this task

Log on to the Agent Desktop after you start the Agent Desktop application. While you log on, you can choose between a desktop phone and a softphone based on your usage mode. 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 and configured. 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. If you have Hot Desking enabled, type your workstation name at the prompt.
3. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4. Click the **Telephony** tab.
5. Select **Desktop Phone** from the **Place and receive calls using** drop-down list. A logon prompt does not appear. Your logon ID is automatically filled in based on the Communication Control Toolkit implementation for your Contact Center. The

system verifies your logon ID and automatically logs you on to the Agent Desktop application.

6. If you are configured to handle Multimedia contacts (such as e-mail), in the **Multimedia** tab, type your **ID** and **Password**.
7. Click **Login**.
The status icon changes to Not Ready.

Variable definitions

Name	Description
<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. You must change your password using the steps in Changing your password on page 30. The system verifies your password and logs you on to the Agent Desktop application. The Logged Out button changes to Logged In .

Logging on to Agent Desktop when using the softphone

About this task

Log on to the Agent Desktop after you start the Agent Desktop application. While you log on, you can choose between a desktop phone and a softphone based on your usage mode. 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 and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type.

Important:

If an audio device (such as a headset or microphone) is added while Agent Desktop is running, you must restart the Agent Desktop to start using the new audio device.

Procedure

1. Start the Agent Desktop.

2. If you have Hot Desking enabled, type your workstation name at the prompt.
3. On the Agent Desktop Top bar, from the **Status** list, select **Login**.
4. Click the **Telephony** tab.
5. Select **My Computer** from the **Place and receive calls using** drop-down list.
6. If your user profile is saved locally on the PC running Agent Desktop, click **Load saved profile**.
7. If you create a new user profile, enter your **Extension**, **Password**, **Server Address**, and **License Type** and then click **Save this profile**.
8. If you are configured to handle Multimedia contacts (such as e-mail), in the **Multimedia** tab, type your **ID** and **Password**.
9. Click **Login**.
The status icon changes to Not Ready and a My Computer (softphone) Registered message appears on the Top bar of the Agent Desktop. The Registered message means that you can now place and receive calls using your computer (softphone). Call control on the computer (softphone) is exactly the same as using a desktop phone.

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>Server Address</i>	The server address of the telephony switch. The server IP address must be configured in the Contact Center Manager Administration.
<i>License Type</i>	The Contact Center license type.
<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. You must change your password using the steps in Changing your password on page 30. The system verifies your password and logs you on to the Agent

Name	Description
	Desktop application. The Logged Out button changes to Logged In .

Logging on to Agent Desktop for Call Center Elite Telephony

About this task

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 **My Computer** from the **Place and receive calls using** drop-down list.
9. Enter your **Extension** and **Password**.
10. Under Elite ACD, select the **Login to Elite** check box.
11. Type your Call Center Elite **Username** and **Password**.
12. If you are configured to handle Multimedia contacts (such as e-mail), in the **Multimedia** tab, type your **ID** and **Password**.
13. Click **Login**.
The Existing Login Detected window appears.

14. Click **Yes** to override the existing login association.

The Agent Login progress bar appears. The Agent Desktop Top bar shows Elite/MM, indicating that you are using Call Center Elite for voice calls and Contact Center Multimedia for multimedia contacts. The status icon changes to Not Ready and a My Computer (softphone) Registered message appears on the Top bar of the Agent Desktop. The Registered message means that you can now place and receive calls using your computer (softphone). Call control on the computer (softphone) is exactly the same as using a desktop phone.

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>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. You must change your password using the steps in Changing your password on page 30. The system verifies your password and logs you on to the Agent Desktop application. The Logged Out button changes to Logged In .

Logging on to Agent Desktop of a SIP-enabled Contact Center

About this task

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**.
 3. In the Enter Login details window, perform one of the following tasks:
 - If your user profile is configured in Office Communicator (OC) ensure that the information in the **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP** fields are correct. You must also ensure that the client is joined to the appropriate domain before you use the Agent Desktop.
 - If your user profile is saved locally on the PC running Agent Desktop, click **Load saved profile**.
 - If you create a new user profile, enter your **Sign-in name**, **Password**, **Domain**, **Uri**, and **Server name or IP**, and then click **Save this profile**.
 4. Click **OK**.
 5. If an OC client runs on the PC running the Agent Desktop, a warning message appears. Click **Yes** to close the OC client.
-

Variable definitions

Name	Description
<i>Sign-in name</i>	User name (for example, agent5001).
<i>Password</i>	Password.
<i>Domain</i>	The Windows domain in which the user name and password are configured in Active Directory.

Name	Description
<i>Uri</i>	The SIP URI of the Windows user (for example, sip:AgentID@mydomain.com or Username@company.com).
<i>Server name or IP</i>	The Fully Qualified Domain Name (FQDN) of the Office Communications Server (OCS) in the Domain (for example, OCS_Server.mydomain.com).
<i>Connect using</i>	Choose the connection protocol, TCP or TLS (more secure).

Logging on to the Presence Services server from a SIP-enabled Contact Center

About this task

Log on to the Presence Services server from the Agent Desktop after you start the Agent Desktop application. Logging on to the Presence Services server is essential if you are using the Presence Services to gather presence information for the Agent, Supervisor, and Expert.

* Note:

After you log on to Agent Desktop, there can be a time lag before the Contacts Presence icon changes to an enabled state. This is because Agent Desktop must log on to the Presence Services server, which is different from the Contact Center server. The length of the time lag depends on factors such as network performance.

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 and configured. 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 **Login**.
3. Click the **Presence** tab.
4. Select the **Enable Presence Login** check box.
5. If your user profile is saved locally on the PC running the Agent Desktop, click **Load saved profile**.
6. If you create a new user profile, enter the **User**, **Password**, **Server Name or IP**, and then click **Save this profile**.

7. Click **Login**.
-

Variable definitions

Name	Description
<i>Enable Presence Login</i>	Allows you to login to the Presence Services server.
<i>User</i>	The username of the agent account created in the System Manager.
<i>Password</i>	The default password is “-”.
<i>Server name or IP</i>	The server name or IP address of the Presence Services server.

Changing your password

About this task

Change your password from the default password, if you are an agent who handles multimedia contacts. The default password is the same as your Agent Logon ID.

If you forget your password, contact your administrator who can reset your password on the Contact Center Multimedia server.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences**.
 2. Select the **Preferences** tab.
 3. Near the bottom of the **Preferences** tab, in the **Password** section, select **Change Password**.
 4. In the **Current Password** box, type your current password.
 5. In the **New Password** box, type your new password.
Your new password cannot be the same as your Agent Logon ID.
 6. In the **Confirm New Password** box, retype your new password.
 7. Click **Save**.
-

Muting and unmuting when using the softphone

About this task

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.

 Note:

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

Procedure

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

- To mute a call, in the Top bar, click **Mute**.

The Mute button changes to Unmute, and other parties present on the call cannot hear you speak and cannot hear any background noise.

- To unmute a call, in the Top bar, click **Unmute**.

The Unmute button changes to Mute, and other parties present on the call can hear you speaking.

Changing the audio settings for softphone

About this task

You can adjust the audio settings for recording and playback, if you are using your computer (softphone) to place and receive calls.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences > Audio Settings**.
2. In the **Audio Settings** tab, in the **Volume** section, adjust the **Playback** slider to set the volume for all sound output through your computer speakers or headphones.
3. Select the Playback **Mute** check box to eliminate any sound output through your computer speakers or headphones.
4. Adjust the **Record** slider to set the recording volume of all sound transmitted through a microphone to your computer.

5. Select the Record **Mute** check box to eliminate any sound being sent to your computer through the microphone.
-

Configuring the audio devices for softphone

About this task

You can configure the audio playback and recording hardware, if you are using your computer (softphone) to place and receive calls.

Procedure

1. On the Agent Desktop Top bar menu, click **User Preferences > Audio Settings**.
 2. In the **Audio Settings** tab, in the **Audio Devices** section, select the audio playback hardware on your local system from the **Playback Device** list.
 3. Select the audio recording hardware on your local system from the **Record Device** list.
 4. Click **Save Audio Devices**.
-

Monitoring the audio quality and VoIP traffic

About this task

The Audio Monitor window helps you in verifying the statistics of microphone, speaker, and Voice-over-IP (VoIP) traffic information. Use the Audio Monitor dialog box to determine the audio quality if the quality of your VoIP communications degrades.

Procedure

1. On the Agent Desktop Top bar menu, 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 Agent Desktop to transmit audio when you are not speaking, select **Silence** in the **Audio Status** section.
 3. Click **Close**.
-

Variable definitions

Name	Description
<i>Microphone</i>	Strength of the audio quality connected to your personal computer.
<i>Speaker</i>	Strength of the speaker quality connected to your personal computer.
<i>Destination</i>	IP address of the call destination.
<i>Codec</i>	A device or a computer program that converts binary signals transmitted on digital networks to analog signals converted on their analog networks.
<i>Traffic</i>	Amount of congestion in the network.
<i>Discarded</i>	Packets that were received but discarded.
<i>Dropped</i>	Packets that were not received.
<i>Jitter Buffer</i>	Packet buffer size 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.
<i>Ping Delay</i>	Time spent by the batch file waiting between two consecutive pings until a timeout.
<i>Perceived Delay</i>	Network delay in receiving packets in milliseconds.
<i>Quality</i>	Percentage of packet loss for receiving packets.
<i>Silence</i>	Select the Silence check box in the Audio Status section, if you do not want Agent Desktop to transmit audio when you are not speaking. By doing so, the system reduces the total amount of data that is sent through your network connection.

Changing your status to Ready

About this task

Change your status to Ready when you are available to create or receive contacts. You can change your status to Ready to receive just Voice or Multimedia contacts, or both types of contacts.

When you change your status to Ready in a SIP-enabled Contact Center, your Contacts Presence status automatically changes to Available.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. Select **Go Ready** to create or receive both Voice and Multimedia contacts.

or

Select **Go Ready — Voice** to create or receive only Voice contacts.

or

Select **Go Ready— Multimedia** to create or receive only Multimedia contacts.

The Agent Desktop places you in the following states:

- In case you select **Go Ready**: The status icon changes to green and the Top bar displays AACC: Ready and Elite: Ready.
- In case you select **Go Ready — Voice**: The left-hand side of the status icon changes to green and the right-hand side of the status icon changes to orange. The Top bar displays AACC: Ready and Elite: Not Ready.
- In case you select **Go Ready— Multimedia**: The left-hand side of the status icon changes to orange and the right-hand side of the status icon changes to green. The Top bar displays AACC: Not Ready and Elite: Ready.

Changing your status to Not Ready

About this task

Change your status to Not Ready when you are not available to receive contacts. You can change your status to Not Ready to not receive just Voice contacts or Multimedia contacts, or not receive both types of contacts. If your administrator has configured Not Ready reasons, you can select a reason when you change your status to Not Ready.

When you change your status to Not Ready in a SIP-enabled Contact Center, your Contacts Presence status automatically changes to Do Not Disturb.

Your supervisor or administrator provides activity codes for the Not Ready reasons. The activity codes defined in Contact Center Manager Server appear in the Agent Desktop list. Alphanumeric codes are available.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. Click **Go Not Ready** to not receive both Voice and Multimedia contacts.
or
Select **Go Not Ready — Voice** to create or receive only Multimedia contacts.
or
Select **Go Not Ready— Multimedia** to create or receive only Voice contacts.

The Agent Desktop places you in the following states:

- In case you select **Go Not Ready**: The status icon changes to orange and the Top bar displays AACC: Not Ready and Elite: Not Ready.
- In case you select **Go Not Ready — Voice**: The left-hand side of the status icon changes to orange and the right-hand side of the status icon changes to green. The Top bar displays AACC: Not Ready and Elite: Ready.
- In case you select **Go Not Ready— Multimedia**: The left-hand side of the status icon changes to green and the right-hand side of the status icon changes to orange. The Top bar displays AACC: Ready and Elite: Not Ready.

Accessing online help

About this task

Access online help when you need immediate help to perform tasks. Agent Desktop includes online help for both agents and supervisors.

Procedure

On the Agent Desktop Top bar menu, click **Help > Show Help**.

Or

Press the F1 key to display the online help.

Logging off from Agent Desktop

Before you begin

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

About this task

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

A warning message appears asking you to confirm that you want to close the Agent Desktop and log off.

Procedure

1. On the Agent Desktop Top bar menu, click the **Status** icon.
2. Click **Log Out**.
Agent Desktop logs you off. The status icon changes to red and the Top bar displays the Logged Out status.

Chapter 5: Telephony

This chapter describes how to handle incoming telephone calls from customers by using Avaya Aura® Agent Desktop.

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

- Accept and decline incoming contacts
- Enter an activity code
- Place and release a call on hold
- Accept a CDN call by placing a DN call on hold
- Transfer a call to another party
- Conference a call
- End a call
- Call a supervisor
- Make a call
- Enter DTMF Digits
- Handle an emergency
- Observe and barge-in on a call (Agent-supervisors only)
- Call an agent using Contacts Presence
- Call an agent using the Phonebook

Although you can use your phone to perform certain tasks, Avaya recommends that you use Agent Desktop to perform all telephony tasks, such as logging on or off, changing your status to Ready or Not Ready, accepting or rejecting a call, placing a customer on hold, transferring a customer, calling a supervisor, and releasing a call.

The Customer Details window shows a history of all past voice calls for a contact. The **History** tab lists the voice calls in reverse chronological order, that is the latest calls appear higher in the call list.

In a SIP-enabled Contact Center there are some telephony tasks that are not available on the agent phones. You must perform the following telephony tasks using the Agent Desktop:

- Enter activity codes
- Call a supervisor
- Observe a call (Agent-supervisors only)
- Barge-in on a call (Agent-supervisors only)

If you are using Agent Desktop Telephony Toolbar the following features are not available:

- Contact History
- Reason code drop-down lists
- Screen Pops

! Important:

You must not use your desktop phone or Agent Desktop to phone, transfer a call, or conference a call to a phone number that is:

- routed to a CDN (Route Point). For example, a Virtual Directory Number (VDN) routed to a CDN (Route Point).
- converted to a CDN (Route Point).
- call forwarded to a CDN (Route Point).

You may use your desktop phone or Agent Desktop to transfer a call, conference or phone directly to a CDN (Route Point).

Accepting a call

Before you begin

- Ensure that you have set your status to either **Go Ready** or **Go Ready — Voice**.
- Ensure that you are assigned to a skillset for handling telephone calls.

About this task

Accept and work with telephone calls. The relevant work item controls become active and the call timer appears on the work item.

If your administrator has configured your Contact Center to run in the Force Call mode, you must handle all contacts presented to you.

Procedure

On the Agent Desktop, select the new alerting work item and click the **Accept** work item control.

The top pane of the Agent Desktop shows the customer details and history of all past calls with the contact.

Declining a call

Before you begin

- Ensure that you have set your status to **Go Not Ready** or **Go Not Ready — Voice**.
- Ensure that you have a skillset designated to handle telephone calls.

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

On the Agent Desktop, select the new work item and click **Reject**.

Entering an activity code

About this task

Enter one or more activity codes during your calls by using the Agent Desktop Top bar activity in-line command. Activity codes provide a method to track the time that agents spend on various types of calls. For example, you can use an activity code to track sales calls by entering that activity code in the Agent Desktop during sales-related calls.

Activity codes are also used to enter Not Ready reasons. You can select activity codes when you are handling a contact. You can select Not Ready codes when your status is Not Ready.

Your supervisor or system administrator provides activity codes. You can use alphanumeric codes. Activity codes that are defined in Contact Center Manager Server appear on the Agent Desktop list. If a new activity code is added while you are logged on to the Agent Desktop, you must log off the Agent Desktop and log on again before you can select the new code from the list.

The **Activity Code** box appears on the work item, based on your Contact Center configuration. For example, if you can only handle voice contacts, the **Activity Code** list is not populated.

Procedure

1. Select the work item.
2. Click the **Activity Code** work item in-line command.

3. In the **Activity Code** drop box, select the Activity Code.
-

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

Procedure

1. Select the work item.
 2. Click **Hold**.
-

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

1. Select the work item.
 2. Click **Unhold**.
The call is released and the status bar color changes to green.
-

Accepting a CDN call by placing a DN call on hold

About this task

Place a Directory Number (DN) call on hold to interrupt your current call and accept an incoming Controlled Directory Number (CDN) call.

Note:

You must change your status to Not Ready and then change your status back to Ready in order to get the CDN calls. You get CDN calls while you are on a DN call, only if the call

presentation class in Contact Center Manager Administration is configured to allow agents to answer CDN calls by placing a DN call on hold. See *Avaya Aura® Contact Center Manager Administration – Client Administration (NN44400-611)*

Procedure

1. On the DN work item, click **Hold**.
2. Change your status to Not Ready and then change your status back to Ready.
3. On the Agent Desktop, select the new alerting CDN work item and click the **Accept** work item control.

Transferring a call

About this task

You can transfer a call to another agent using 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 you complete the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

* Note:

The blind transfer option on Agent Desktop toolbar is disabled in a SIP-enabled Contact Center. However, you can complete the transfer before the third party answers the call (perform a blind transfer) using the steps in this procedure. Or, you can transfer the call from the main toolbar via the phone icons (this is a supervised transfer only).

* Note:

Initiate call option on Agent Desktop toolbar is disabled in a SIP-enabled Contact Center, as SIP systems can initiate only one call at a time, even though the agent has the capability of calling a second number by clicking the **Supervisor** icon.

* Note:

If you are transferring a call to a voice mail system, you must ensure that the correct DTMF tones are transferred to the voice mail system.

Procedure

1. On the work item, 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.
The active call is placed on hold and the call is placed to a third party. While you speak with the third party, both the **Transfer** and **Hold** buttons on the phone flash

to indicate that you have a customer on hold and that you must complete the transfer.

4. Before the third party answers the call, click **OK**.
The call is transferred to the third party and is dropped from your phone.

Conferencing in another agent

About this task

You can conference another agent, if you want the agent to join your current call.

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

About this task

You can conference an agent-supervisor, if you want the supervisor to join your current call.

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 **Conference** again to take the customer off hold and conference in the customer and your supervisor.

Ending a call

About this task

End a call when a call is completed. If your status was Ready before the call, your status is automatically set 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 and enter a Not Ready Reason Code in the **Code** field of the Top bar. Not Ready Reason codes are defined by the administrator.

Procedure

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



Calling your supervisor

About this task

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

To call a supervisor when you are on a call, see [Conferencing in a supervisor](#) on page 42.

Procedure

On the Agent Desktop Action bar menu, click **Supervisor**.



Making a call

About this task

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

- the default phone number
- a new external phone number
- a new internal phone number

Procedure

1. On the Agent Desktop Action bar menu, click **Originate Call**.

2. In the **Originate Call** text box, enter the phone number to dial.
 3. Click **Originate Call** again.
The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.
 4. Click **Release** when you complete the call.
 5. If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.
-

Using DTMF digits

About this task

Use the DTMF feature if you need to navigate through a Contact Center menu or dial numbers to access voice messages during a call.

Procedure

1. On the Agent Desktop Action bar menu, click **DTMF**.
 2. Enter the numbers on the keypad that appears.
-

Using the Emergency key

About this task

Use the Emergency key if you require immediate assistance from your supervisor while handling a call. For example, if a customer suddenly threatens you while you are on a call, you can add your supervisor to the call immediately. The caller is not placed on hold during an emergency conference.

* Note:

Emergency key is not supported in Avaya Aura® Call Center Elite Telephony.

Procedure

On the Agent Desktop Top bar menu, click **Emergency**.
Your supervisor is immediately added to the call and joins the conference with you and the customer.

Observing a call

Before you begin

- Ensure that you log on to Agent Desktop.
- Ensure that you have agent-supervisor privileges.

* Note:

Observing and Barging-in on a call are possible only in a SIP-enabled Contact Center.

About this task

An agent-supervisor can listen in on a call. In a SIP-enabled Contact Center, both the observe and barge-in functions can be used to listen in on a call. When using the observe function, the agent-supervisor can listen to a call without being heard. When using the barge-in function, the agent-supervisor can participate in a call between the agent and the customer.

The agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

By default, the agent or customer on the call hears a tone when the agent-supervisor joins or leaves the call. This setting can be customized, for more information see *Avaya Aura® Contact Center Commissioning* (NN44400-312).

An agent-supervisor can handle calls and be a supervisor to other agents. Only one supervisor at a time can observe a call, and the supervisor can observe only one call at a time.

Procedure

1. On the Agent Desktop Top bar menu, click **Observe**.
The **Supervisor Observe** window appears.
2. Under **Filter**, select the appropriate **Item** and **Value** to get a list of agents.
For example, to observe agent-customer voice calls, select the Item as Contact Type with the Value as Voice.
3. Select a voice call and click **Observe**.
A new call is presented on the Agent Desktop of the supervisor. The new call is not a Contact Center call, so the agent status does not need to be set to Ready. The call connects the supervisor or agent-supervisor to the selected agent's call.
4. Accept the call ringing on your Agent Desktop.

* Note:

When using the Observe function, you cannot participate in the call. Use the barge-in function to participate in the call. See [Barging-in on a call](#) on page 46.

5. To end the voice call observation session, click **Release**.

The voice call observation session is ended when the agent, customer or supervisor releases the call.

Barging-in on a call

Before you begin

- Ensure that you log on to Agent Desktop.
- Ensure that you have agent-supervisor privileges.

* Note:

Observing and Barging-in on a call are possible only in a SIP-enabled Contact Center.

About this task

An agent-supervisor can barge-in on a call, if they are observing a call that needs immediate supervisor attention. When using the barge-in function, the agent-supervisor can participate in a call between the agent and the customer.

The agent-supervisor actions do not affect the original call or the normal connect and disconnect actions of the agent and customer conversation.

By default, the agent or customer on the call hears a tone when the agent-supervisor joins or leaves the call. This setting can be customized, for more information see *Avaya Aura® Contact Center Commissioning* (NN44400-312).

Procedure

1. To barge-in on a call you are observing, in the **Supervisor Observe** window, click **Barge-in**.
 2. When your conversation is complete, click **Release**.
The voice call continues until the agent or the customer releases the call.
-

Calling an agent using Contacts Presence

About this task

Call an agent's default phone number after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. To call an agent from your list, click the **My Contacts** tab.
Or
To call an agent from an Instant Experts group, click the **CC Contacts** tab.
 3. Select the name of the person you want to call, after confirming that they are available.
 4. Click the **Click-to-call** icon or right-click the name of the person and click **Call**, and then click the default phone number.
The default phone number is dialed.
 5. Click **Release** when you complete the call.
-

Calling an agent using the Phonebook

About this task

The Phonebook allows you to contact agents through the LDAP agent contact directory.

Procedure

1. On the Agent Desktop, click **Phonebook**.
The Phonebook appears and displays a list of entries from the LDAP agent contact directory.
 2. Type a name in the **Search** field in the last name, first name format.
The search field is not case-sensitive.
 3. Click **Search**.
The list scrolls to the appropriate name or the closest match.
 4. Select a name and click the **Call** icon.
The default phone number is dialed.
 5. Click **Release** when you complete the call.
-

Chapter 6: Call Center Elite Telephony

This chapter describes how to handle incoming telephone calls from Call Center Elite.

Avaya Aura® Contact Center Release 6.2 provides a single-interface client application to handle voice calls from Call Center Elite through a desktop phone, softphone or other phone (other phone used for Telecommuter mode only). To log on to Agent Desktop for Call Center Elite Telephony in Telecommuter mode, see *Avaya Aura® Offsite Agent User Guide* (NN44400-120).

This allows you to handle voice calls and multimedia contacts from one single integrated Agent Desktop.

Note:

The Call Center Elite integration currently does not support Supervisor functions.

Important:

You must not use your desktop phone or Agent Desktop to phone, transfer a call, or conference a call to a phone number that is:

- routed to a CDN (Route Point). For example, a Virtual Directory Number (VDN) routed to a CDN (Route Point).
- converted to a CDN (Route Point).
- call forwarded to a CDN (Route Point).

You may use your desktop phone or Agent Desktop to transfer a call, conference or phone directly to a CDN (Route Point).

You must configure the Agent Desktop to handle calls from Call Center Elite.

Note:

You cannot use the Agent Desktop to handle both Call Center Elite and Avaya Aura® Contact Center calls at the same time.

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

- Accept incoming calls
- Enter an activity code
- Place and release a call on hold
- Transfer a call to another party
- Conference a call

- End a call
- Make a call
- Use DTMF digits
- Call an agent using the Phonebook

Although you can use your phone to perform certain tasks, Avaya recommends that you use the Agent Desktop to perform all telephony tasks, such as logging on or off, changing your status to Ready or Not Ready, accepting a call, placing a customer on hold, transferring a customer, and releasing a call.

Accepting a call

Before you begin

- Ensure that you have set your status to either **Go Ready** or **Go Ready — Voice**.
- Ensure that you are assigned to a skillset for handling telephone calls.

About this task

Accept and work with telephone calls. The relevant work item controls become active and the call timer appears on the work item.

If your administrator has configured your Contact Center to run in the Force Call mode, you must handle all contacts presented to you.

Procedure

On the Agent Desktop, select the new alerting work item and click the **Accept** work item control.

—————

Entering an activity code

About this task

You can enter activity codes during your calls by using the **Activity Code** icon that appears on each work item. Activity codes provide a method to track the time you spend on various types of calls. For example, you can use an activity code to track sales calls by entering that activity code in the Agent Desktop during sales-related calls.

Your supervisor or system administrator provides activity codes. You can use alphanumeric codes. Activity codes that are defined in Contact Center Manager Administration appear on the Agent Desktop list. If a new activity code is added while you are logged on to the Agent Desktop, you must log off the Agent Desktop and log on again before you can select the new code from the list.

Activity codes are also used to enter Not Ready and Log Out reason codes. You can go Not Ready for either multimedia contacts, voice contacts, or both. You use the Agent Desktop Top bar Agent Status icon to select the relevant reason codes. When you select your status as not ready to handle multimedia contacts, the Agent Desktop Top bar shows “AACC: Not Ready (<Activity Code selected>)”. When you select your status as not ready to handle voice contacts, the Agent Desktop Top bar shows “Elite: Not Ready (<Activity Code selected>)”. When you are logging out, select the relevant Log Out reason.

The **Activity Code** icon appears on each work item, based on your Contact Center configuration. You use the **Activity Code** icon to set Work reason Activity codes. When selected, the Work reason activity code appears on the Work item.

Procedure

1. To enter a Work Reason code, select the work item.
2. Click on the **Activity Code** icon that appears on the work item.
3. In the **Activity Code** tree view, select the relevant **Activity Code** option.
4. To enter a Not Ready reason code, click the **Agent Status** icon on the Agent Desktop Top bar.
5. In the **Agent Status** tree view select **Go Not Ready** and the relevant **Activity Code** option. For example, if you are not ready to handle voice contacts select **Go Not Ready > Voice** and select the relevant activity code.
6. To enter a Log Out reason code, click the **Agent Status** icon on the Agent Desktop Top bar.
7. In the **Agent Status** tree view select **Log Out** and the relevant **Activity Code** option.

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

Procedure

1. Select the work item.
2. Click **Hold**.

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

1. Select the work item.
 2. Click **Unhold**.
The call is released and the status bar color changes to green.
-

Transferring a call

About this task

You can transfer a call to another agent using 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 you complete the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

* Note:

The blind transfer option on Agent Desktop toolbar is disabled in a SIP-enabled Contact Center. However you can complete the transfer before the third party answers the call (perform a blind transfer) using the steps in this procedure.

* Note:

If you are transferring a call to a voice mail system, you must ensure that the correct DTMF tones are transferred to the voice mail system.

Procedure

1. On the work item, click **Transfer > Enter Value**.
2. In the **Action bar** text box, type the number to which you want to transfer the call. The active call is placed on hold and a call is placed to a third party. While you speak with the third party, both the **Transfer** and **Hold** buttons on the phone flash to indicate that you have a customer on hold and that you must complete the transfer.
3. Before the third party answers the call, click **OK**.

The call is transferred to the third party and is dropped from your phone.

Conferencing in another agent

About this task

You can conference another agent, if you want the agent to join your current call.

Procedure

1. On the work item, click **Conference** > **Enter Value**.
 2. In the **Action bar** text box, type the number of the agent to conference into the call.
 3. Speak with the agent, if necessary, before you conference in the customer.
 4. Click **Conference** again to take the customer off hold and conference in the customer and the other agent.
-

Ending a call

About this task

End a call when a call is completed. If your status was Ready before the call, your status is automatically set 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 and enter a Not Ready Reason Code in the **Code** field of the Top bar. Not Ready Reason codes are defined by the administrator.

Procedure

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

Making a call

About this task

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

- the default phone number
- a new external phone number
- a new internal phone number

Procedure

1. On the Agent Desktop Action bar menu, click **Originate Call**.
 2. In the **Originate Call** text box, enter the phone number to dial.
 3. Click **Originate Call** again.
The phone number is dialed. A new work item is added to the work list and the call timer on the work item starts to increment.
 4. Click **Release** when you complete the call.
 5. If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.
-

Using DTMF digits

About this task

Use the DTMF feature if you need to navigate through a Contact Center menu or dial numbers to access voice messages during a call.

Procedure

1. On the Agent Desktop Action bar menu, click **DTMF**.
 2. Enter the numbers on the keypad that appears.
-

Calling an agent using the Phonebook

About this task

The Phonebook allows you to contact agents through the LDAP agent contact directory.

Procedure

1. On the Agent Desktop, click **Phonebook**.
The Phonebook appears and displays a list of entries from the LDAP agent contact directory.
 2. Type a name in the **Search** field in the last name, first name format.
The search field is not case-sensitive.
 3. Click **Search**.
The list scrolls to the appropriate name or the closest match.
 4. Select a name and click the **Call** icon.
The default phone number is dialed.
 5. Click **Release** when you complete the call.
-

Chapter 7: Outbound calls and callbacks

This chapter describes how to handle outbound calls and callbacks using the Avaya Aura® Agent Desktop.

The campaign administrator creates Outbound campaigns. When a campaign runs, the system pushes outbound contacts to your desktop in the same way that the system presents voice or multimedia contacts. When you accept an outbound contact, you are actively working on a call.

When you accept an outbound contact, the Agent Desktop displays the customer information and any other information related to the campaign. Some campaigns include a script that you need to follow, during the call.

If the campaign administrator selects manual agent dial, you can call the customer after you review the customer and campaign information. If the campaign administrator selects auto dial, the system automatically places the call for you after a defined number of seconds.

You use the Agent Desktop interface to perform the following outbound tasks:

- Accept and decline the incoming contact
- Make an outbound call
- Review and update customer information
- Follow a script
- End a call and assign a disposition code
- Schedule a callback
- Call the customer

You can also use the Agent Desktop to create a callback. Both customers and agents can create scheduled callbacks. If your Contact Center is licensed for Web communications, a customer can request a call from an agent through a Customer Interface Web site. From the Web site, the customer can specify the reason they are requesting the callback, as well as a date and time for the call.

An agent can schedule a callback to a customer using the **Schedule Callback** button. The Schedule Callback feature is available only if your Contact Center is licensed for outbound contacts. However, a scheduled callback is not associated with an outbound campaign.

At the specified date and time, Agent Desktop presents the contact to an agent with the appropriate skillsets. To perform a callback, a supervisor must assign an agent the skillset to handle outbound contacts.

Accepting an outbound contact

Before you begin

- Ensure that you have set your status to Ready.
- Ensure that you have a skillset designated to handle outbound contacts.

About this task

Use the Agent Desktop interface to accept and handle outbound campaigns, one call at a time.

Your outbound administrator can configure the outbound calls in the following ways:

- Place the call immediately after you accept a call
- Place the call after a specified number of seconds
- Enable the agent to make the call

By using the Contact Center Manager Administration, an administrator can configure the Agent Desktop to give audio and visual alerts when a contact is presented. For more information about these features, see *Avaya Aura® Contact Center Server Administration* (NN44400-610).

Procedure

On the Agent Desktop work item, click **Accept**.

When you accept an incoming contact, you connect to the customer. The Agent Desktop displays the customer details and the defined script for the call. The call is dialed according to the settings in the outbound campaign, and the call timer appears on the status bar.

Declining an outbound contact

About this task

You can decline an outbound contact if you want to reject the contact. Change your status to Not Ready if you are unavailable to handle contacts.

Procedure

On the Agent Desktop work item, click **Reject**.

Placing an outbound call

Before you begin

- Understand how to use a script.
- Understand how to record the result of a call.

About this task

Place an outbound call by accepting or opening an outbound contact. You can then review the customer details and the outbound contact script. Your outbound administrator can configure the outbound calls to be made immediately after you accept a call, or specify a number of seconds before the call is placed.

After you accept or open an outbound contact, you can call the customer and perform the following tasks:

- Verify customer information. After you successfully place the call, confirm that you have reached the correct customer by reviewing the contact information with the customer.
- Follow the script or complete the questionnaire, if applicable.
- Complete the call and assign a disposition code. Schedule a callback if required, enter applicable notes, and save the call results.

Procedure

1. On the Agent Desktop Action bar menu, click **Initiate**.
 2. In the Enter Destination window, click **OK** to dial the default customer telephone number.
 3. If you get to speak with the customer, proceed with the call using a script, if applicable.
 4. If you do not get to speak with the customer, record the result of the call to update the contact with the appropriate disposition code, reschedule the call, and add applicable notes, if required.
 5. Verify the customer information and update customer contact fields, if required.
-

Using a script

About this task

Use a script if the campaign administrator has assigned an agent script to the outbound campaign. The content of the agent script depends on the campaign. The script can contain an introduction, a conclusion, and a number of questions or suggested phrases. As you

progress through the script, you can record your answers or comments directly on the **Script Questions** tab. The customer responses are saved automatically.

*** Note:**

If the campaign administrator does not assign an agent script to the outbound campaign, the **Script Questions** tab does not appear.

Procedure

1. On the Agent Desktop, click the **Script Questions** tab.
 2. Read the introduction to the customer.
 3. Read each question present in the script to the customer.
 4. Record the customer responses by using one of the three methods defined on the **Script Questions** tab (the customer responses are saved automatically):
 - Select an option from the list. Depending on the outbound campaign, you can read the options to your customer and then select the option based on the customer's response.
 - Select an option.
 - Type the customer comments in a text box.
 5. To disconnect from the call, click **Release**.
-

Recording the result

About this task

Record the result of a call by selecting a disposition code at the end of each outbound call. The campaign administrator defines disposition codes to use for each campaign. The disposition codes can be different for every campaign.

Some disposition codes indicate that the call was completed (for example, Not Interested or Sale Made), while other disposition codes indicate that the call was not completed (for example, No Answer or Number Busy). If the call was not completed, or if the customer requests for callback, you can schedule a callback.

Procedure

1. Click the **Disposition codes** tab.
 2. Select the disposition code that most accurately reflects the result of your call.
-

Ending the call

About this task

End the call after you verify the customer details, answer all the questions in the outbound script, and record a disposition code.

The script questions and answers are saved in the multimedia database, if the disposition code is configured to do the same. Contact your supervisor or administrator for more information about which disposition codes to select.

If the call is incomplete, or the customer requests a callback, you can schedule a callback.

Procedure

Click **Finish**.



Scheduling a callback

Before you begin

- Ensure that you are not working on another contact.
- Ensure that your telephony toolbar is open.
- Identify a customer for a scheduled callback.

About this task

Schedule a callback if you made a call from your desktop and the customer was not available. You can also schedule a callback in response to an e-mail message or telephone request from a customer. A scheduled callback outbound contact is not pegged against an outbound campaign.

Procedure

1. Click **Schedule Callback**.
2. In the Schedule Callback window, select a skillset from the list to direct the contact to the agent with the most appropriate skills.
3. Select either an active agent for the call, or choose a specific agent from a list of all agents.
4. In the **Subject** box, type a subject for the callback.
5. In the **Time** box, select the time to perform the callback.

6. In the **Date** box, select the date to perform the callback.
The dates appear according to the configuration in Contact Center Manager Administration. See, *Avaya Aura® Contact Center Server Administration (NN44400-610)*
 7. In the **Reason** box, type additional information about the contact or the customer. Only agents and supervisors can view the information in the **Reason** box.
 8. Click **Send**.
The scheduled callback is entered into the database, ready to be routed when the selected date and time occurs. The scheduled callback is presented to the same agent who generates the callback.
-

Calling the customer

Before you begin

- Ensure that you are assigned to an outbound skillset.

About this task

Call a customer when you need to manually place a call. With an outbound campaign contact, your administrator can configure the call to be automatically dialed when you accept the contact. A scheduled callback contact cannot be configured to be dialed automatically. You must manually place the call after you review the contact information.

Procedure

1. When the contact is presented to your desktop, click **Accept**.
 2. On the Agent Desktop Action bar menu, click **Originate Call** to dial the default customer telephone number, which is displayed in the text box beside the **Originate Call** button.
 3. In the Enter Destination dialog box, click **OK** to dial the default customer telephone number.
 4. When you complete the call, click **Release**.
 5. If required by your supervisor, enter an activity code in the **Activity Code** box, and then press **Enter**.
-

Chapter 8: Predictive Outbound

This chapter describes how to handle Predictive Outbound contacts using the Avaya Aura® Agent Desktop.

Administrators create Outbound campaigns using the customer database, custom scripts, and Predictive Outbound settings that determine how calls are presented to agents with Predictive skillsets. Based on how the Administrator configures the campaign, calls can be dialed by the system or by the agent and presented to the agent either immediately or with a specified amount of time during which the agent can preview the contact.

The Predictive Outbound feature requires additional hardware and software.

You can use the Predictive Outbound features to perform the following telephone tasks:

- Accept incoming contacts
- Cancel incoming contacts
- Place a call on hold
- Transfer a call to another party
- Transfer a contact to another agent, skillset or work session
- Conference a contact (call and data)
- End a contact (call and data)
- Schedule a callback

There are five dialing options in Predictive Outbound for delivering contacts to the Agent Desktop. The dialing option used is determined by the administrator during configuration of the campaign and routing the contact to the Agent Desktop. The five dialing options are as follows:

- Predictive: Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer simultaneously receives the call. The agent cannot cancel the contact or dial the number.
- Paced: Contact Center presents a record to the agent for review while the customer's number is being dialed. The agent cannot cancel the contact or dial the number.
- Preview: Contact Center presents a record to the agent for review. After a configured period of time passes, the system dials the default number for the customer. The agent can cancel the contact or manually dial the number, before the configured period of time expires.
- Progressive: Similar to the Predictive dialing option, Contact Center sends a record to the dialer for automatic outbound processing. The contact is displayed on the Agent Desktop and the customer simultaneously receives the call. The agent cannot cancel the contact or dial the number. Unlike the

Predictive dialing option, Contact Center prevents the number of calls in progress from exceeding the number of idle agents.

- Manual: Contact Center presents a record to the agent for review. There is no time limit specified. The agent can cancel the contact or manually dial the number.

 Note:

Do not perform telephony tasks by using a mixture of steps on your telephone and the telephony toolbar. For example, do not place a call on hold using your telephone and then retrieve the call by clicking **Unhold** on the toolbar.

Prerequisites for Predictive Outbound

- You must have configured the hardware and software required to use the Predictive Outbound feature.
- You must have configured agents with Predictive skillsets.
- If Microsoft Internet Explorer Enhanced Security is enabled on your computer, you must add the Predictive Outbound application server to your list of trusted sites.

Changing to Ready status

About this task

Change your status to Ready after you log on to Agent Desktop and are ready to accept contacts.

Procedure

1. From the Agent Desktop application, click the **Status** drop-down icon.
2. Click **Go Ready**.
The agent status changes to Ready.

Procedure job aid

Table 5: Predictive Outbound statuses

Predictive Outbound status	Description	Actions Allowed
Not Ready	The agent cannot receive contacts. This is the initial status following the agent log on.	Click Ready. Log off Agent Desktop.
Ready	The agent can receive a contact.	Click Not Ready. Log off Agent Desktop.
Talking	The agent is connected to a contact.	Click Transfer, Conference, Hold, Consult, Not Ready (pending), Callback, Disposition, or Hangup.
Preview	The agent has received a contact on the Agent Desktop and is previewing the contact before dialing, canceling, or receiving the contact.	Dial the contact's phone number. Cancel the contact. Receive the call when the timer expires.
Preview (Paced)	The agent has received a contact on the Agent Desktop and is previewing the contact before the system automatically connects the call.	None.
Preview (Manual)	The agent has received a contact on the Agent Desktop and is previewing the contact before dialing or canceling.	Dial the contact's phone number. Cancel the contact.
Preview Callback	The agent has received a callback contact on the Agent Desktop and is previewing the contact before dialing, canceling, or receiving the contact.	Dial the contact's phone number. Cancel the contact. Receive the call when the timer expires.
Preview Callback (Manual)	The agent has received a callback contact on the Agent Desktop and is previewing the contact before dialing or canceling.	Dial the contact's phone number. Cancel the contact.

Predictive Outbound status	Description	Actions Allowed
Wrapup	This status appears if: • the agent disconnects • the contact disconnects • the DN disconnects	Click Disposition, Originate, Callback, Not Ready (pending), or Hangup (if a secondary call is connected).
Talk Customer Hold	The agent is consulting with another agent while the customer is on hold.	Click Hangup, Callback, Not Ready (pending), Transfer, or Conference.
Voice Only	The agent is being consulted.	Click Hangup or Hold.
Conferenced (Owner)	The agent is consulting with another agent and a customer.	Click Leave Conference, Disposition, Hold, or Not Ready (pending).
Conferenced (Passive)	The agent is being consulted by another agent and a customer.	Click Hangup or Hold.
ConferencedExt (Owner)	The agent is consulting with an external party, outside the Contact Center, and a customer.	Click Leave Conference, Disposition, Hold, or Not Ready (pending).

Changing to Not Ready status

Before you begin

- Ensure that you have no active contact.

About this task

Change your status Not Ready to indicate that you are not ready to accept contacts.

Procedure

1. From the Agent Desktop application, click the **Status** drop-down icon.
2. Click **Go Not Ready**.
The agent status changes to Not Ready.

Changing to Not Ready status when on a contact

Before you begin

- Ensure that you have an active contact.

About this task

Change your status to Not Ready, while still on a contact to indicate that you are not ready to accept contacts when the current contact is completed.

Procedure

1. From the Agent Desktop application, click the **Status** drop-down icon.
 2. Click **Go Not Ready**.
The button changes to Not Ready and Pending Not Ready appears in title bar. The agent status change remains Pending and does not change to Not Ready until the current contact ends.
-

Handling a Predictive or Progressive call

Before you begin

- Ensure that your status is set to Ready.

About this task

Agents use the same procedure for handling a Predictive or Progressive call. However, the administrator can use Progressive calls to prevent the system from dialing calls that exceed the number of idle agents.

Predictive and Progressive calls are delivered to your Agent Desktop automatically. The customer is on the line and the customer details and call script appears on your Agent Desktop.

Procedure

Respond to the call when it is presented to you.
Your agent status is Talking.

Handling a Paced call

Before you begin

- Ensure that your status is set to Ready.

About this task

Handling a paced call enables you to preview a call while it is being dialed by the system. You cannot cancel the call or dial the customer's phone number.

Procedure

1. Preview the customer details and the call script that appear on the Agent Desktop.
Your agent status is set to Preview (Paced).
 2. Respond to the call when it is presented to you.
Your agent status is Talking.
-

Handling a Preview call

Before you begin

- Ensure that your status is set to Ready.

About this task

Handling a Preview call enables you to preview a call before you or the system dials the customer's phone number. You have a predefined time period in which you need to preview the contact information. Before this time period expires, you can dial the customer's phone number or cancel the contact. When the preview time period expires, the system dials the customer's number and presents the contact to you.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.
Your agent status is set to Preview. The count down of the Preview time begins and the time remaining is displayed in the Preview Contact dialog box.
2. Choose one of the following actions:
 - Select one of the customer's phone numbers from the Preview Contact dialog box, and click **Dial** to call the customer.

- Click **Cancel** to cancel the contact.
- Respond to the call when the Preview time period expires and the system automatically presents the call to you.

If you or the system dials the customer, your agent status is set to Talking. If you cancel the contact, your agent status is set to Ready.

Handling a manual call

Before you begin

- Ensure that you have set your status to Ready.

About this task

Handling a manual call uses a procedure similar to handling a preview call. However, a manual call is handled through the phone switch and not through the Predictive Outbound features.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.
Your agent status is set to Preview (Manual).
2. Choose one of the following actions:
 - Select the phone number of one of the customer's that appears in the Preview Contact dialog box, and click **Dial** to call the customer.
 - Click **Cancel** to cancel the contact.

If you dial the customer, your agent status is Talking. If you Cancel the contact, your agent status is Ready.

Cancelling a call

Before you begin

- Ensure that your status is set to Ready.
- Ensure that you have a Predictive skillset designated for handling telephone calls.

About this task

Cancel a call if you want to reject a contact and place the contact back in the queue.

You can cancel only Preview or Manual Predictive Outbound calls.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.
Your agent status is Preview or Preview (Manual).
 2. In the Preview Contact dialog box, click **Cancel**.
The contact is returned to the queue.
-

Transferring a call

Before you begin

- Ensure that the agent to whom you want to transfer a call has a Predictive skillset designated for handling telephone calls.
- Ensure that the agent to whom you want to transfer a call has the status set to Ready.

About this task

You can transfer a call to another agent in your Contact Center. Transferring a call requires several steps, particularly if the agent to whom you want to transfer a call does not have the status set to Ready, when the initial request is made. When you select an agent (or skillset, work session, or phone) and click **Consult**, a request to connect to the agent is generated. Following the request, one of the following events occur:

- If the requested agent is not logged on, the consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click **Close** to cancel the request.
- If the requested agent is logged on, but does not have the status set to Ready, the consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click **Close** to cancel the request.
- If the requested agent is logged on, but does not have the status set to Ready, and does not become available after 60 seconds, the request gets timed out. The originating agent can try to transfer the call to another agent or can click **Close** to cancel the request.
- At any time while the request is being made, the originating agent can click **Cancel** to cancel the request. All other buttons on the Transfer dialog box are disabled while the request is being made.

An agent with Predictive Outbound skillsets can encounter the following scenario during a call transfer:

- If an agent in a Predictive Outbound skillset performs a supervised transfer to an invalid or busy phone number, the agent hears a busy signal. To avoid a call disconnect, the agent

must not complete the transfer if there is a busy signal. The agent must confirm that the third party is available before completing the transfer.

Procedure

1. On the Agent Desktop Predictive Outbound Voice Path work item, click **Transfer**.
2. In the Transfer dialog box, select whether to transfer the call by **Skillset**, **Agent**, **Work Session**, or **Phone number**, and then select the party to whom you want to transfer the call from the updated list of available options.

OR

Type a phone number in the **Number to Dial** field.

* Note:

In the Manual mode, if you press the **Transfer/Conference** buttons on the phone, the Transfer/Conference dialog box does not appear on the Agent Desktop as it does for other modes of Predictive Outbound.

3. Click **Consult**.
If the requested agent is available, Consult changes to Transfer. A voice connection is established between the originating agent and the consulted agent. The customer is placed on hold. The originating agent's status is set to Talk Customer Hold. The consulted agent's status is set to Voice Only.
4. Speak to the consulted agent and provide any information needed before completing the transfer.
5. Click **Transfer**.
The transfer is completed. If the call is transferred to another agent, the originating agent's status is set to Ready and the consulted agent status is set to Talking. If the call is transferred to an external party, the originating agent's status is set to Wrapup.

Conferencing in another agent

Before you begin

- Ensure that the agent to whom you want to transfer a call has a Predictive skillset designated for handling telephone calls.
- Ensure that the agent to whom you want to transfer a call has the status set to Ready.

About this task

You can conference in another agent in your Contact Center. Conferencing in another agent involves several steps, particularly if the agent you want to conference with does not have the status set to Ready, when you make the initial request. When you select an agent (or skillset,

work session, or phone) and click **Consult**, a request to connect to the agent is generated. Following the request, one of the following events occur:

- If the requested agent is not logged on, the consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click **Close** to cancel the request.
- If the requested agent is logged on, but does not have the status set to Ready, the consult attempt fails immediately. The originating agent can try to transfer the call to another agent or can click **Close** to cancel the request. The originating agent can add the customer to the call and begin the conference by clicking the **Conference** button. The originating agent's status is set to Conferenced (Owner). The consulted agent's status is set to Conferenced (Passive).
- If the requested agent is logged on, but does not have the status set to Ready, and does not become available after 60 seconds, the request gets timed out. The originating agent can try to transfer the call to another agent or can click **Close** to cancel the request.
- At any time while the request is made, the originating agent can click **Cancel** to cancel the request. All other buttons on the Conference dialog box are disabled while the request is being made.

If an agent with a Predictive Outbound skillset initiates a conference call to an invalid or busy phone number, the agent hears a busy signal. To avoid a call disconnect, the agent must not complete a conference call if there is a busy signal. The agent must confirm that the third party is available before completing a conference call.

Procedure

1. On the Agent Desktop work item, click **Conference**.
2. In the Conference dialog box, select whether to conference the agent by **Skillset**, **Agent**, **Work Session**, or **Phone** number, and then select the party you want to conference in from the updated list of available options.

OR

Type a phone number in the **Number to Dial** field.

Note:

In the Manual mode, if you press the **Transfer/Conference** buttons on the phone, the Transfer/Conference dialog box does not appear on the Agent Desktop as it does for other modes of Predictive Outbound.

3. Click **Consult**.
If the requested agent is available, Consult changes to Conference. A voice connection is established between the originating agent and the consulted agent. The customer is placed on hold. The originating agent's status is set to Talk Customer Hold. The consulted agent's status is set to Voice Only.
4. Speak to the consulted agent and provide any information needed before adding the customer to the conference call.
5. Click **Conference**.

The conference call is active. The status of both the originating agent and the consulted agent is set to Talking.

Hanging-up and leaving a conference call

About this task

Hangup on a call with the customer, and depending on the call and agent state, leave a conference call with another agent.

Procedure

On the Agent Desktop, Predictive Outbound voice path work item, click **hangup/leave conference**.

The agent gets disconnected from the call.

Procedure job aid

Table 6: Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talking	The agent is disconnected from the customer and the agent's status is set to Wrapup.
Wrapup (available if a second call is connected)	The call is disconnected.
Talk Customer Hold (available for an agent who initiated a consultation and placed the customer on hold)	The agent being consulted is disconnected. The agent who initiated the consultation is reconnected with the customer and the agent's status returns to Talking.
Voice Only (available for an agent being consulted)	The agent being consulted is disconnected and the agent's status returns to Ready. The agent who initiated the consultation remains connected with the customer.
Conferenced (Passive) (available for an agent who has been conferenced)	The agent being consulted is disconnected. The agent who initiated the consultation remains connected with the customer.
Conferenced (Owner)	The agent is disconnected from both parties and the control of the call is passed to the agent who is being consulted.

Predictive Outbound status	Result when hangup is clicked
ConferencedExt (Owner) (available for an agent that initiated a conference)	The agent is disconnected from the external party and the customer. However, the agent who initiated the consultation requires to add the disposition for the contact.

Ending a contact

About this task

End a contact with the customer.

Procedure

1. On the Agent Desktop, Predictive Outbound voice path work item, click **hangup/leave conference**.
The agent gets disconnected from the call.
2. Click **Disposition Contact**.
3. Select a disposition code from the Disposition Codes dialog.
4. Click **OK**.
If the customer call is still connected both the contact and the customer call are disconnected.

Procedure job aid

Table 7: Options when ending a call

Predictive Outbound status	Result when hangup is clicked
Talking	The Disposition Codes dialog box appears.
Wrapup	The Disposition Codes dialog box appears.
Conferenced (Owner)	The Disposition Codes dialog box appears.
ConferencedExt (Owner)	The Disposition Codes dialog box appears.

Originating a call

Before you begin

- Ensure that your status is set to Wrapup.

About this task

You can originate a call to a customer when your status is set to Wrapup.

Procedure

1. Click **Initiate a Call**.
 2. Select one of the customer's phone numbers from the **Select Destination** box.
OR
Manually type the phone number in the **Number To Dial** box.
 3. Click **Dial**.
-

Scheduling a callback

Before you begin

- Ensure that you have a Predictive skillset designated to handle telephone calls.

About this task

Schedule a callback when you want to arrange a callback with a customer for a future date or time.

Procedure

1. Click **Schedule Callback**.
2. In the Schedule Callback window, select a **Date** and **Time** for the callback.
3. Select whether the time for the callback is based on the **Agent Local Time** or the **Customer Time**.
4. Select one of the customer's phone numbers from the **Phone** list.
OR
Manually type a phone number in the **Number** box.
5. Select the **Type** of callback.

6. Select an **Agent** for the callback.
 7. Type a note in the **Memo** box, if it is required for the callback.
 8. Click **OK**.
-

Variable definitions

Schedule Callback fields

Name	Description
<i>Date</i>	Date for the scheduled callback.
<i>Time</i>	Time for the scheduled callback. The default for the scheduled callback is the current Contact Center time plus 20 minutes.
<i>Agent Local Time or Customer Time</i>	The location where the Date and Time apply. Select Agent Local Time to use the Date and Time of the Contact Center for the callback. Select Customer Time to use the Date and Time of the customer's location for the callback.
<i>Number</i>	Manual phone number to use for the callback. If a manually entered phone number is in the Number field, it is used instead of a phone number in the phone list.
<i>Phone</i>	List of available phone numbers for the customer. To use a select number in the phone list, ensure that the Number field is empty.
<i>Type</i>	Type of callback or Predictive Outbound campaign. The type selected determines the Agent and Team names that you can select. The callback types are: • Standard: The callback goes to any available agent in the original Predictive Outbound campaign type. • Personal: The callback goes to the agent scheduling the callback, regardless of the

Name	Description
	Predictive Outbound campaign type or Team assigned. • Enterprise Campaign: The callback goes to the next available agent, if the agent scheduling the callback is not available. • Private Campaign: The callback goes to the agent scheduling the callback. • Enterprise Team: The callback goes to the next available agent in the assigned team. • Private Team: The callback waits for the agent scheduling the callback to be assigned to the team.
<i>Agent</i>	Agent for the callback. The team selected determines the agent names that can be selected.
<i>Team</i>	Team for the callback. The type of callback determines the Team names that can be selected.
<i>Memo</i>	Memo text entered by the agent scheduling the callback appears at the bottom of the call script when the callback contact is presented to an agent.

Handling a standard callback call

Before you begin

- Ensure that your status is set to Ready.
- Ensure that the work session on CPSEE Application server is active.

About this task

Handling a Standard callback call is similar to handling a normal call in each mode of predictive outbound calling (Manual, Paced, Preview, Progressive and Predictive) apart from memo text. A contact is presented to an agent as a result of a scheduled Standard callback type.

A Standard callback call is automatically delivered to your Agent Desktop. The customer details and call script (including any memo notes entered when the scheduled callback was created) appear on your Agent Desktop.

You can preview, cancel or dial the customer's phone number, if the contact presented to you is a Preview or manual contact.

Procedure

Respond to the call when it is presented to you.
Your agent status is set to Talking.

Handling a non-standard callback call

Before you begin

- Ensure that your status is set to Ready.

About this task

Handling a non-Standard callback call is similar to handling a Preview call. A contact is presented to an agent as a result of a scheduled callback of any of the following types:

- Personal
- Enterprise campaign
- Private campaign
- Enterprise team
- Private team

For any of these callback call types you can preview a call before you or the system dials the customer's phone number. You have a predefined time period in which you need to preview the contact information. Before this time period expires, you can dial the customer's phone number or cancel the contact. When the preview time period expires, the system dials the customer's number and presents the contact to you.

Procedure

1. Preview the customer details and the call script that appears on the Agent Desktop.
Your agent status is set to Preview Callback. The count down of the Preview time begins and the time remaining is displayed in the Preview Contact dialog box.
2. Choose one of the following actions:
 - Select one of the customer's phone numbers from the Preview Contact dialog box, and click **Dial** to call the customer.
 - Click **Cancel** to cancel the contact.
 - Respond to the call when the Preview time period expires and the system automatically presents the call to you.

If you or the system dials the customer's number, your agent status is set to Talking.
If you cancel the contact, your agent status is set to Ready.

Chapter 9: E-mail

Use the Avaya Aura® Agent Desktop to perform the following tasks when you handle an e-mail message:

- Accept or decline the incoming e-mail contact
- Review and update customer information
- Send a reply
- Add an attachment
- Add inline images into an e-mail message
- Insert a template or auto signature
- Forward an e-mail message
- Finish an e-mail message
- Spell check an e-mail message
- Postpone work on a contact
- Follow up on a contact
- Transferring a contact
- Print contact details
- Send an e-mail message to an agent using the Phonebook

You can also use the Agent Desktop to create a new e-mail message.

Important:

Contact Center limits the **To**, **CC**, and **BCC** fields to 255 characters. If you exceed this limit, Agent Desktop truncates the address fields.

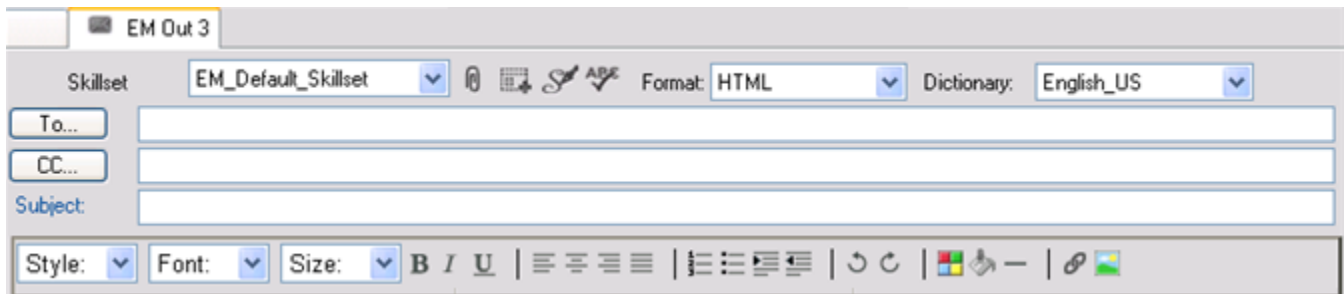


Figure 5: Example of e-mail toolbar

The Agent Desktop e-mail editor offers improved e-mail editing, formatting feature buttons, and management in HTML format e-mail messages. The following formatting buttons are added to the e-mail toolbar at the bottom of the e-mail toolbar:

- Style
- Text font
- Text size
- Bold text
- Italic text
- Underlined text
- Align text left
- Align text center
- Align text right
- Justify text
- Numbers
- Bullets
- Increase text indent
- Decrease text indent
- Undo (Ctrl+z)
- Redo (Ctrl+y)
- Highlight text
- Change text color
- Horizontal line-rule support
- Insert hyperlink
- Insert inline image

These formatting and additional insertion buttons are only displayed on the e-mail editor toolbar, when the e-mail message is created using the HTML format. E-mail messages created with the plain text format do not support text formatting.

Blind carbon copy (Bcc:) is available only when using the e-mail Address Book.

The following table describes the e-mail feature buttons:

Table 8: E-mail editing and formatting controls

Control	Name of the Control	Function
B	Bold	Bold the selected text
<i>I</i>	Italic	Italicize the selected text
<u>U</u>	Underline	Underline the selected text
	Left	Align text with left margin
	Center	Center text
	Right	Align text with right margin
	Justify	Justify text
	Numbers	Numbered list items
	Bullets	Bulleted list items
	Indent	Indent selected text
	Outdent	Outdent selected text
	Undo	Undo last change
	Redo	Redo the last change
	Color	Change color of selected text
	Link	Insert a hyperlink
	Image	Insert an inline image
	Insert a file	Insert an e-mail attachment
	SpellCheck	Spell check the e-mail message
	Insert Signature	Insert a signature to the e-mail message

Control	Name of the Control	Function
	Insert a Template	E-mail templates
	Rule	Adds a continuous line under the selected location
	Highlight	Highlights selected text with a color chosen from the color palette

Accepting an incoming e-mail message

About this task

Accept an incoming e-mail message, when you are ready to receive the customer's e-mail, display customer details and begin contact with a customer. The Agent Desktop displays the customer details and the call timer appears on the work item. The new incoming e-mail message is presented as a new work item in the Work List window.

Procedure

On the Agent Desktop, click **Accept**.
The e-mail message opens in the E-mail Display panel.

The customer details associated with the e-mail message appears in the bottom left-hand corner of the Customer Details panel.

Declining an incoming e-mail message

About this task

Decline an incoming e-mail message if you cannot handle the e-mail message. The new incoming e-mail message disappears from your work list.

Procedure

On the Agent Desktop, click **Reject**.

Verifying customer information

About this task

Verify customer information by reviewing the information that is displayed in the left side of the Customer Details window. The Customer Details window displays information such as the customer details and the history of recent customer interactions.

If you accept a contact, or choose to read a contact, a maximum of 15 contacts appear before your selection and a maximum of 15 contacts appear after your selection on the **History** tab. Use the navigation arrow buttons to scroll through the contacts that appear in the customer history. A page shows a maximum of 31 contacts. The status bar indicates the contacts you are viewing and the total number of contacts in the history list.

You can use the Customer Details — History pane to view the details of previous interactions with the customer, including automatic responses sent and the content of previous e-mail messages.

Procedure

1. On the Agent Desktop, in the Customer Details window, click the **Details** tab to verify customer contact information.
 2. Click the **History** tab to view the details of previous interactions with the customer for all the Multimedia types.
 3. Click the **CI Details** tab to view the Customer Interface Web site details.
-

Resetting customer password

About this task

You can reset the customer password, if a customer requests for a change of password.

Procedure

1. On the Agent Desktop Action bar, click **Customer Search**.
2. Type a name in the **Search** field in the last name, first name format.
The search field is not case-sensitive.
3. Click **Search**.
The list scrolls to the appropriate name or the closest match.
4. Select the customer whose password you want to change.

5. Click the **CI Details** tab and select **Reset Password**.

Replying to an e-mail message

Before you begin

- Ensure that you understand how to use the address book to reply to a contact. See [Using the address book to reply to a contact](#) on page 88.
- Ensure that you understand how to create a template response. See [Using a template response](#) on page 90.
- Ensure that you understand how to use the spell check feature. See [Using the spelling checker](#) on page 94.
- Ensure that you understand how to add attachments to an e-mail message. See [Adding an attachment to your e-mail response](#) on page 91.

About this task

Reply to an e-mail message when a customer sends an e-mail message to the Contact Center requesting a response. Create a response to a customer in the same format as the original request.

You can use several features (present in the following list) in the Agent Desktop interface to create your e-mail response in HTML or plain text:

- Auto suggestions
- the address book
- one or more response templates
- an automatic signature
- an attached file
- the spelling checker

You can also add a comment to an e-mail message in the **Agent Note** box as a reference for later communications with the customer. The customer does not see the information present in the **Agent Note** box.

Procedure

1. On the Agent Desktop, in the e-mail window, click **Reply**.
2. In the E-mail Response window, accept the default **To** e-mail address. The default e-mail address is the address from which the message was sent.
Or
Click **To** to add a e-mail address of the customer, which is other than the default e-mail address.

Or

Click **Cc** to add other e-mail addresses from the corporate address book or multimedia database.

3. In the **Subject** box, either accept the subject currently displayed or edit the subject.
 4. Add text to the reply using one or both of the following methods:
 - Type the message text.
 - Add a template response.
 5. If you use the HTML format for creating the e-mail message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.
You cannot format a plain text e-mail message.
 6. To change the text size, select the text and click the up arrow to increase the font size, or click the down arrow to decrease the font size.
 7. To perform a spell check, click the **SpellCheck** icon.
 8. To insert an automatic signature to the e-mail message, click the **Insert Signature** icon.
 9. To add an attachment to the e-mail response, click **Insert a file**.
 10. In the **Agent Note** box, type additional information about the contact or the customer, if required.
Only agents and supervisors can view the information in the **Agent Note** box.
 11. Click **Send**.
 12. Close the contact.
If required, select a reason for closing the contact.
-

Creating an e-mail message

Before you begin

- Ensure that you are assigned to an e-mail skillset.
- Ensure that you are currently not handling a contact.

About this task

Create an e-mail message to send to a customer.

Procedure

1. On the Agent Desktop Action bar, click **Choose Action** and select **Initiate Email**.
2. In the **To** box, enter the e-mail address of the customer.
If additional addresses are required add them to the **Cc** box.
3. Click **Create Email**.
4. In the **Subject** box, type the subject of the message.
5. In the body text box, add the e-mail response. You can add the response using one or both of the following methods:
 - Type the message text.
 - Add a template response.
6. To attach a file to the e-mail message, click **Insert a file**.
7. Select the appropriate skillset from the **Skillset** list.
8. In the **Agent Note** box, type additional information about the contact or the customer, if required.
Only agents and supervisors can view the information in the **Agent Note** box.
9. Click **Send**.
The system searches the database for the customer's e-mail address. If the customer does not exist in the database, the system creates a new customer record, as well as a new contact and response record. The contact closes automatically.

Using the address book to reply to a contact

About this task

Use the address book to search for an e-mail address in the corporate address book or in the customer database, when you use e-mail to reply to a customer or transfer a contact. You can search for addresses to add to the **To**, carbon copy (**Cc**), or blind carbon copy (**Bcc**) fields of your e-mail message. The address book can contain information from an external directory, a local directory, or a customer database.

Procedure

1. In the e-mail window, click **To** or **Cc**.
2. In the Select Names dialog box, from the **Search for records from** box, select the database to search for customer address.
The address book appears and displays a list of entries from the database in the left pane. The entries are sorted alphabetically by last name.

3. Type a name in the **Search** field in the last name, first name format.
The **Search** field is not case-sensitive.
 4. Click **Search**.
The list scrolls to the appropriate name or the closest match.
 5. Select a name, and then click **To**, **Cc**, or **Bcc** to add the name to the appropriate recipient list.
You can double-click on a name to add it to the **To** list.
 6. To view additional details about any name that appears in the address book, select the name, right-click and select the **Properties** option.
 7. Click **Close** to close the Properties window and return to the address book.
 8. After you select all required recipients for the e-mail message, click **OK**.
-

Removing a name from the recipient list

About this task

Remove a name from the recipient list if you do not want to send the e-mail message to that particular contact.

Note:

Removing a name from the recipient list does not remove the name from your address book or database.

Procedure

Select the name from the **To**, **Cc**, or **Bcc** field, and then press **Delete** on your keyboard.

Creating a template response

About this task

Create and store your own templates to use predefined e-mail messages or responses to standard customer queries. You can use part of or all of the template text as your e-mail response.

Procedure

1. Create the response message in a text editor, such as Notepad.
 2. Click **Save As**.
 3. Name the file using a descriptive name and ensure that the file name has a .txt extension (for example, WarrantyURL.txt).
 4. Navigate to the folder in which to store the template response file.
 5. Save the file.
-

Defining your default template folder

About this task

Define the location of the default template folder, if you want to use a template in an e-mail response.

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
 2. Select the **Preferences** tab.
 3. In the **Default Template Location** box, type the complete path to the template folder.
Or
Click **Change** to select a new folder location.
 4. Click **Save**.
-

Using a template response

About this task

Use a template response that you previously created for responses to standard customer queries.

Procedure

1. In the e-mail window, click **Insert a Template**.
2. Navigate to the template folder.

If you have defined a template folder in the user settings, the default template folder automatically appears.

3. Select the template file, and then click **Open** to display the template text.
 4. Edit the text in the body of the e-mail message, if necessary.
-

Defining your default attachment folder

About this task

Define a default attachment folder in which to store files to add as attachments to e-mail messages. You can add a file from the Shared Files folder that your administrator creates, or you can attach files by navigating to any other directory, folder, or subfolder on your computer.

Note:

You must save file attachments with UTF-8 encoding.

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
 2. Select the **Preferences** tab.
 3. In the **Default Attachment Location** box, type the complete path to the folder containing the attachment.
Or
Click **Change** to change the current folder location.
 4. Click **Save**.
-

Adding an attachment to your e-mail response

About this task

You can add one or more file attachments to an e-mail message that you send to a customer.

Procedure

1. In the e-mail window, click **Insert a File**.

2. Click **Attach**.
If you have defined an attachment folder in the user settings, the default attachment folder automatically appears.
 3. To add a file from a different location, navigate to the appropriate directory or folder.
 4. Locate and select the file to attach.
 5. Click **Open**.
-

Viewing e-mail attachments

About this task

Use the Contact Details window to view e-mail attachments. The attachments can be based on the accepted contact types (voice mail, fax, or scanned document).

 Note:

Some browsers do not support some attachment formats.

Procedure

1. In the Contact Details window, click the **History** tab.
 2. Double-click **Attachments** to view attachments in a new browser window.
-

Removing an attachment from an e-mail response

About this task

You can remove one or more attachments from an e-mail response to a contact.

Procedure

1. In the e-mail window, click **Remove**.
 2. In the **Select Attachment(s) to remove** list, select the attachment you want to delete.
Use Ctrl+click to select multiple attachments.
 3. Click **OK**.
-

Adding inline images

About this task

You can add one or more inline images to an e-mail message that you send to a customer.

Inline attachments display complete information within the body of the e-mail. This makes the information easily accessible to customers, even without explicitly opening the attachment. For example, you can add a company logo as an inline image to increase brand awareness.

Note:

The inline image formats supported are .gif, .bmp, .jpg, and .png.

Procedure

1. On the e-mail toolbar, click the **Image** icon.
 2. In the body text box, position your cursor where you want to add your image.
 3. Click **Browse** to locate and select the image.
Or
Type the path for the image in the **Image Address (URL)** box.
 4. Optionally, enter the **Alternate text** for the image.
 5. Select the appropriate alignment option, for the image, from the **Align** drop-down list.
 6. Optionally, enter the **Border** value to create a border around the image.
 7. Optionally, enter the **Margin** value to insert a margin around the image.
 8. Click **Insert Image**.
The image is inserted at the cursor position.
-

Variable definitions

Name	Description
<i>Browse</i>	Browse to locate the inline image that you want to include in the e-mail message.
<i>Image Address (URL)</i>	The URL for the inline image that you want to include in the e-mail message.
<i>Alternate text</i>	The alternative text for the image.

Name	Description
	Alternate text is what the customer sees if their e-mail client cannot display the image.
<i>Align</i>	Alignment of the image. The options are inline, left and right.
<i>Border</i>	Border around the image. For example, enter 2, to add a double-sized border around the image.
<i>Margin</i>	Margin around the image.

Using the spelling checker

About this task

Use the spelling checker on the Agent Desktop interface to locate spelling errors in your e-mail message. You can enable or disable the automatic spell check feature.

You can use the User Settings window to select the default language for the spell checking dictionary. You can also specify a spell check dictionary for a particular e-mail message by selecting a language from the list on the right side of the e-mail toolbar.

The spell check feature highlights words in the e-mail subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling is retained. The spell check feature closes automatically when it cannot find any more misspelled words.

Note:

The spell check feature does not check spelling in attachments.

Procedure

1. Once you complete typing your e-mail message, click the **SpellCheck** icon.
2. If the spell check feature highlights a word, perform one of the following steps:
 - Click **Ignore** to keep the original spelling of the word.
 - Click **Ignore All** to keep the original spelling of all instances of the word.
 - Click **Add** to add the selected word to the dictionary.
 - Click **Replace** to replace the word with the suggested text.
 - Click **Replace All** to replace all instances of the word with the suggested text.

- Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits, words in uppercase, and words with HTML tags.
 - Click **Cancel** to terminate the spell check.
-

Closing the e-mail contact

About this task

Close the e-mail contact when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Close** to complete the contact.
 2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your e-mail contact.
-

Postponing work on a contact

Before you begin

- If you have started on an e-mail message and the work is postponed, the content of the e-mail message is lost. Therefore, copy and save text from an e-mail message to have the information available when the contact becomes active again.

About this task

Postpone work on a contact if you are waiting for further information about the contact.

Procedure

1. Click **Reschedule** to postpone work on the contact.
You still own the contact and can continue to work on the contact when it is rescheduled to you.
2. In the Present Contact at dialog box, enter the time and date to reopen the contact.
The default Pending timer is configured in the Contact Center Multimedia Administrator. The contact reopens when the Pending timer expires.

3. In the **Agent Note** field, add a note to the contact to remind yourself why the contact is in the Pending state.
You can view the pending contact in the **History** tab.
-

Following up on a contact

About this task

Follow up on a contact after you complete a contact but want to perform a follow-up action, for example, to transfer a contact to another agent.

Procedure

1. Click **Follow-up**.
The e-mail display control appears.
 2. Perform the necessary follow-up action.
-

Transferring a contact within the Contact Center

About this task

Transfer a contact to another skillset or to a specific agent within the Contact Center.

When you transfer a contact to a skillset or an agent, you also transfer ownership of the contact. The system automatically forwards the entire contact, including any attachments, to the new agent. You can also add additional information for the contact.

Procedure

1. Click **Transfer**.
 2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.
Or
Click the **Agent** tab to assign the contact to a specific agent.
 3. Select the skillset or agent to which you want to transfer the contact.
 4. In the **Agent Note** box, type additional information about the reason for the transfer.
 5. Click **Transfer**.
-

Transferring a contact outside the Contact Center

About this task

Transfer a contact to an e-mail address outside the Contact Center for consultation.

When you transfer a contact to an external e-mail address, you must manually add any attachments you want to send with the e-mail message.

Procedure

1. Click **Transfer**.
 2. Click the **External** tab.
 3. Enter the e-mail address to which you want to transfer the contact.
Or
Click **To** to select an address from the corporate address book.
 4. In the **Agent Note** box, type additional information about the reason for the transfer.
 5. To add an attachment, click **Attach**.
 6. Click **Transfer**.
-

Printing contact details

About this task

Print a summary of the interaction with a contact. All information that is displayed in the bottom-left of the e-mail or Outbound contact window gets printed. Print Preview is also supported.

Procedure

- Click **Print Contact**.
-

Sending an e-mail message to an agent using the Phonebook

About this task

Phonebook allows you to contact agents through the LDAP agent contact directory. You can send an e-mail message to an agent using the Phonebook.

Procedure

1. On the Agent Desktop, click **Phonebook**.
The Phonebook appears and displays a list of entries from the LDAP agent contact directory.
 2. Type a name in the **Search** field in the last name, first name format.
The **Search** field is not case-sensitive.
 3. Click **Search**.
The list scrolls to the appropriate name or the closest match.
 4. Select a name and click the **E-mail** icon.
The e-mail window appears with the agent's default e-mail address in the **To** address field.
 5. In the **Subject** box, type the subject of the e-mail message.
 6. In the body text box, type the message text.
 7. To add a file to the e-mail message, click **Insert a file**.
 8. Click **Send**.
-

Chapter 10: Fax message

This chapter describes how to perform fax message tasks. Use the Avaya Aura® Agent Desktop to perform the following tasks when you handle a fax message:

- Accept or decline the incoming fax message
- Review the fax message
- Send a reply
- Close a fax message
- Transfer a fax message

Fax messages from customers are forwarded by a fax server to an e-mail address within the Contact Center. The fax is sent to an appropriate skillset queue. If you are assigned to this skillset, then the fax message is presented to you. You reply to the fax message by sending an e-mail message back to the fax server. The fax server then sends the reply fax to the customer.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling fax messages.

Accepting an incoming fax message

About this task

Accept an incoming fax message to view the message. The Agent Desktop presents this new fax message as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new fax message work item, and click **Accept**.
The fax message opens in the fax display panel.

Declining an incoming fax message

About this task

Decline an incoming fax message if you cannot handle the fax message. The new incoming fax message disappears from your work list.

Procedure

On the Agent Desktop, select the new fax message work item and click **Reject**.

Reviewing a fax message

Before you begin

- Ensure that you have accepted a fax message and opened it in the fax viewer.

About this task

Use the Agent Desktop fax viewer to review a fax message.

Procedure

1. On the Agent Desktop fax viewer, click **Navigate** to view all the pages of the fax message.
 2. Click **Rotation** to rotate the fax message.
 3. Click **Zoom** to magnify the fax message.
-

Replying to a fax message

Before you begin

- Ensure that you understand how to use the spell check feature. See [Using the spelling checker](#) on page 94.

About this task

Reply to a fax message when a customer sends a fax message to the Contact Center requesting a response. You reply to a fax message by sending an e-mail message to a fax server. The fax server then sends the reply fax back to the customer.

Procedure

1. After you review the customer contact, click **Reply**.
 2. In the Fax Response window, accept the default e-mail address that appears in the **To** box.
The default e-mail address is the same e-mail address from which the message was sent.
 3. In the **Subject** box, either accept the subject currently displayed or edit the subject.
 4. Type the reply in the e-mail editor text box.
 5. If you use the HTML format for creating the e-mail message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.
You cannot format e-mail messages that are created in plain text.
 6. To perform a spell check, click the **SpellCheck** icon.
 7. To insert an automatic signature to the fax message, click the **Insert Signature** icon.
 8. In the **Agent Note** box, type additional information about the contact or the customer.
Only agents and supervisors can view the information in the **Agent Note** box.
 9. Click **Send**.
 10. Close the contact.
If required, select a reason for closing the contact.
-

Closing a fax message

About this task

Close a fax message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the fax message.
 2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your fax message.
-

Transferring a fax message

About this task

Transfer a fax message to another skillset or to a specific agent in the Contact Center. When you transfer a fax message to a skillset or agent, you also transfer the ownership of the contact.

Procedure

1. Click **Transfer**.
 2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.
Or
Click the **Agent** tab to assign the fax message to a specific agent.
 3. Select the skillset or agent to which you want to transfer the contact.
 4. In the **Agent Note** box, type additional information about the reason for the transfer.
 5. Click **Transfer**.
-

Chapter 11: Scanned document

This chapter describes how to perform tasks to handle scanned document. Use the Avaya Aura® Agent Desktop to perform the following tasks when you handle a scanned document message:

- Accept or decline an incoming scanned document
- Review the scanned document
- Reply to a scanned document
- Close the scanned document
- Transfer a scanned document

A scanned document is an electronic version of a printed page or document. Scanned documents are forwarded in the TIFF format, in a Contact Center, by a document imaging server to an e-mail address. You can reply to the scanned document by sending an e-mail message to a printer. The printed e-mail message is then sent back to the customer.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling scanned documents.

Accepting an incoming scanned document message

About this task

Accept an incoming scanned document message to view the message. The Agent Desktop presents this new scanned document as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new scanned document work item, and click **Accept**.
The scanned document opens in the document display panel.

Declining an incoming scanned document message

About this task

Decline an incoming scanned document message if you cannot handle the message. The new incoming scanned document message disappears from your work list.

Procedure

On the Agent Desktop, select the new scanned document work item and click **Reject**.

Reviewing a scanned document message

Before you begin

- Ensure that you have accepted a scanned document and opened it in the document viewer.

About this task

Use the Agent Desktop document viewer to review a scanned document message.

Procedure

1. On the Agent Desktop document viewer, click **Navigate** to view all the pages of the document.
 2. Click **Rotation** to rotate the scanned document.
 3. Click **Zoom** to magnify the scanned document.
-

Replying to a scanned document message

Before you begin

- Ensure that you understand how to use the spell check feature. See [Using the spelling checker](#) on page 94.

About this task

Reply to an scanned document message when a customer sends a scanned document to the Contact Center requesting a response. You can reply to the scanned document by sending an e-mail message to a printer. The printed e-mail message is then sent back to the customer.

Procedure

1. After you review the customer contact, click **Reply**.
 2. In the Response window, accept the default e-mail address that appears in the **To** box.
The default e-mail address is the same e-mail address from which the message was sent.
 3. In the **Subject** box, either accept the subject currently displayed or edit the subject.
 4. Type the reply in the e-mail editor text box.
 5. If you use the HTML format for creating the e-mail message, and you want to make the text bold, underline, or italics, select the text, and click the appropriate button to apply formatting.
You cannot format e-mail messages that are created in plain text.
 6. To perform a spell check, click the **SpellCheck** icon.
 7. To insert an automatic signature to the message, click the **Insert Signature** icon.
 8. In the **Agent Note** box, type additional information about the contact or the customer.
Only agents and supervisors can view the information in the **Agent Note** box.
 9. Click **Send**.
 10. Close the contact.
If required, select a reason for closing the contact.
-

Closing a scanned document message

About this task

Close the scanned document message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the scanned document message.
 2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your scanned document message.
-

Transferring a scanned document

About this task

Transfer a scanned document to another skillset or to a specific agent within the Contact Center. When you transfer a scanned document to a skillset or agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.
 2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.
Or
Click the **Agent** tab to assign the scanned document to a specific agent.
 3. Select the skillset or agent to which you want to transfer the contact.
 4. In the **Agent Note** box, type additional information about the reason for the transfer.
 5. Click **Transfer**.
-

Chapter 12: Voice mail messages

This chapter describes how to perform tasks to handle voice mail messages. Use the Avaya Aura® Agent Desktop to perform the following tasks when you handle a voice mail message:

- Accept or decline the incoming voice mail message
- Listen to a voice mail message
- Reply to a voice mail message
- Close a voice mail message
- Transfer a voice mail message

In the Contact Center voice mail messages are forwarded by a voice mail server to an e-mail address as a .wav attachment. The voice mail message is then sent to an appropriate skillset queue. If you are assigned to the skillset that handles voice mail message, then the voice mail message is presented to you.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling voice mail messages.

Accepting an incoming voice mail message

About this task

Accept an incoming voice mail message to view the message. The Agent Desktop presents this new voice mail message as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new voice mail message work item, and click **Accept**.
The voice mail message opens in the e-mail display panel. The voice mail is a .wav attachment present in this e-mail.

Declining an incoming voice mail message

About this task

Decline an incoming voice mail message if you cannot handle the voice mail message. The new incoming voice mail message disappears from your work list.

Procedure

On the Agent Desktop, select the new voice mail message work item and click **Reject**.

Listening to a voice mail message

Before you begin

- Ensure that you have accepted a voice mail message and opened it in the e-mail viewer.
- Ensure you have a media player that supports .wav file format audio files.

About this task

Use the default Windows Media player to listen to a voice mail message.

Procedure

1. On the Agent Desktop e-mail viewer, under **Attachments**, double-click the .wav attachment to open it in your default media player.
 2. Listen to the voice mail message.
-

Replying to a voice mail message

Before you begin

- Ensure that you have the customer's phone from the voice mail or from the Customer Information panel.

About this task

Reply to an voice mail message when a customer sends a voice mail message to the Contact Center requesting a response. You reply to a voice mail message by calling back the customer.

Procedure

1. On the Agent Desktop Action bar menu, 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.
The phone number is dialed. A new work item is added to the work list and the call timer on the work items starts to increment.
 4. Click **Release** when you complete the call.
 5. If required by your supervisor, type an activity code in the **Activity Code** box, and then press Enter.
-

Closing a voice mail message

About this task

Close the voice mail message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the voice message.
 2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your voice mail message.
-

Transferring a voice mail message

About this task

Transfer a voice mail message to another skillset or to a specific agent within the Contact Center. When you transfer a voice mail message to a skillset or an agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.
 2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.
Or
Click the **Agent** tab to assign the voice mail message to a specific agent.
 3. Select the skillset or agent to which you want to transfer the contact.
 4. In the **Agent Note** box, type additional information about the reason for the transfer.
 5. Click **Transfer**.
-

Chapter 13: Short Message Service text message

This chapter describes how to perform tasks to handle Short Message Service (SMS) text message tasks. Use the Avaya Aura® Agent Desktop to perform the following tasks when you handle an SMS text message:

- Accept or decline the incoming SMS text message
- Send a reply
- Check the spelling of an SMS text message
- Close an SMS text message contact
- Transfer an SMS text message

SMS text messages from customers are forwarded by an SMS gateway to an e-mail address within the Contact Center. The SMS text message is then sent to an appropriate skillset queue. If you are assigned to the skillset that handles SMS text messages, then the SMS text message is presented to you.

Prerequisites

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling SMS text messages.

Accepting an incoming SMS text message

About this task

Accept an incoming SMS text message to display customer details and begin contact with a customer. The Agent Desktop displays the customer details and the call timer appears on the work item. The new incoming SMS text message is presented as a new work item in the Work List window.

Procedure

On the Agent Desktop work list, select the new SMS text message work item, and click **Accept**.

The SMS text message opens in the display panel.

The customer details for the SMS text message appears in the bottom-left hand corner of the Customer Details panel.

Declining an incoming SMS text message

About this task

Decline an incoming SMS text message if you cannot handle the message.

Procedure

On the Agent Desktop, select the new SMS text message work item and click **Reject**.

The SMS text message work item is removed from the work list.

Replying to an SMS text message

About this task

Reply to an SMS text message when a customer sends an SMS text message to the Contact Center requesting a response. Create a response to a customer in the same format as the original request.

You can use several features in the Agent Desktop interface to create your response:

- one or more response templates
- the spelling checker

You can add a comment to the message in the **Agent Note** box to provides reference for later communications with the customer. The customer does not see the content of the **Agent Note** box.

Procedure

1. After you review the customer contact, click **Reply**.
2. In the E-mail Response window, accept the default To e-mail address, with the same e-mail address from which the message was sent.

Or

Click **To**, **Cc** to add other e-mail addresses from the corporate address book or multimedia database.

3. In the **Subject** box, accept the subject currently displayed or edit the subject.
 4. Add text to the reply using one or both of the following methods:
 - Type the message text.
 - Add a template response.
 5. To perform a spell check, click the **SpellCheck** icon.
 6. In the **Agent Note** box, type additional information about the contact or the customer.
Only agents and supervisors can view the information in the **Agent Note** box.
 7. Click **Send**.
 8. Close the contact.
If required, select a reason for closing the contact.
-

Using the spelling checker

About this task

Use the spell check feature on the Agent Desktop interface to locate spelling errors in your message. You can enable or disable the automatic spell check feature.

You can use the User Settings window to select a default language for the spell check dictionary. You can also specify a spell check dictionary for a particular e-mail message by selecting a language from the list on the right side of the toolbar.

The spell check feature highlights words in the SMS text message subject and body that are considered incorrect and presents alternatives, which you can accept or ignore. If you accept the change, the new spelling replaces the original word. If you ignore the change, the original spelling is retained. The spell check feature closes automatically when it cannot find any more misspelled words.

Procedure

1. Once you complete typing your SMS text message, click the **SpellCheck** icon.
2. If the spell check feature highlights a word, perform one of the following steps:
 - Click **Ignore** to keep the original spelling of the word.
 - Click **Ignore All** to keep the original spelling of all instances of the word.
 - Click **Add** to add the selected word to the dictionary.
 - Click **Replace** to replace the word with the suggested text.
 - Click **Replace All** to replace all instances of the word with the suggested text.

- Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits or words in uppercase.
 - Click **Cancel** to terminate the spell check.
-

Closing an SMS text message contact

About this task

Close the SMS text message when the contact is complete. When you close a contact, select a Closed Reason code. The Closed Reason codes that appear are applicable to the contact type being closed.

Procedure

1. Click **Finish** to complete the contact.
 2. Select one of the configured **Closed Reason** codes that best describes the reason you closed your SMS text message.
-

Transferring an SMS text message

About this task

Transfer an SMS text message to another skillset or to a specific agent within the Contact Center.

When you transfer an SMS text message to a skillset or an agent, you also transfer ownership of the contact.

Procedure

1. Click **Transfer**.
2. Click the **Skillset** tab to assign the contact to any agent with a particular skillset.
Or
Click the **Agent** tab to assign the contact to a specific agent.
3. Select the skillset or agent to which you want to transfer the SMS text message.
4. Select the **External** tab if you want to transfer the SMS text message outside the Contact Center for consultation.

5. In the **Agent Note** box, type additional information about the reason for the transfer.
 6. Click **Transfer**.
-

Short Message Service text message

Chapter 14: Web communications

This chapter describes how to perform the tasks to handle text chat sessions. It describes how to use the following Web communications feature to communicate directly with customers in real time over the Internet by using the Avaya Aura® Agent Desktop:

- Accept or decline an incoming contact
- Customize a tab name
- Review and update customer information
- Send an automated response
- Push a Web page
- Transfer a chat session
- Conference a chat session
- Observe a chat session (Agent-supervisor only)
- Barge-in on a chat session (Agent-supervisor only)
- Check whether the customer's browser is still connected
- Check the time of the most recent customer action and whether the customer is currently typing a message
- Respond to the customer (e-mail or voice) if more information or clarification is needed
- End a chat session
- Send the chat log in an e-mail message

Accepting a Web communications contact

Before you begin

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling Web communications.

About this task

Accept a Web communications contact to communicate privately with a customer in real time over the Internet. An agent and a customer can use the text chat component of the Agent Desktop to conduct a two-way conversation by exchanging messages.

A customer requests a chat session by clicking the **Text Chat** icon on the Web site. The customer is presented with a form to fill in and select the appropriate skillset, subject, and

objective for their chat session. The customer is then placed into Web-on-hold, or a similar treatment configured in your Contact Center, while waiting for an agent to accept their chat request.

The text chat frame displays a complete record of the conversation as well as any URLs that you previewed or pushed to the customer. Each chat message can contain up to 4045 characters.

The Agent Desktop can be configured to give audio and visual alerts when a contact is presented. These features are configured by an administrator, using the Contact Center Multimedia Administrator. For information about enabling or disabling these features, see *Avaya Aura® Contact Center Server Administration* (NN44400-610).

After you accept the contact, you can view the customer details and a history of all past interactions with the Contact Center in the left pane, such as the most recent message sent by the customer, whether the customer's browser is still connected to the session, and whether the customer is currently typing a message. The right pane of the Agent Desktop shows the tools used for Web communications:

- Send the Message — Add the comments from the **Chat** box to the Conversation frame.
- Push the URL — Send a selected URL to the customer's browser.
- Add the selected auto-phrase — Add the selected auto-phrase to the Conversation frame.
- Select the text alignment — Change the alignment of text from left to right to right to left and vice versa.
- E-mail chat log — Select this check box to e-mail a copy of the chat log to the customer.

Procedure

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

Note:

Your site administrator configures the maximum number of additional contacts you can manage.

Customizing a tab name

About this task

If you have multiple IM Web communications contacts, you can customize the tab name to identify the received contact.

Procedure

1. On the Agent Desktop right panel, double-click the required tab.

2. Type the *<contact name>*.

Variable definitions

Name	Description
<i><contact name></i>	The keyword you use to identify the customer. For example, the first name or the last name.

Declining a Web communications contact

About this task

Decline a Web communications contact when you are not available to chat with a customer and you want to return the contact to the queue.

Procedure

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

The contact returns to the queue and into Web-on-hold. Your status is set to Not Ready.

Sending a chat message

About this task

Send a chat message to communicate privately with a customer in real time over the Internet.

Procedure

1. Type the message.
2. Click the **Send the Message** icon.
Your name or agent label appears in the Conversation frame, followed by your message.

Adding an auto-phrase to a chat message

About this task

Add an automatic phrase to a chat message when you want to select a commonly-used phrase from a configured list.

Procedure

1. Select the **Add the selected auto-phrase** icon.
 2. Select the auto-phrase to use from the list.
The automatic phrase is added to the **Chat** text box. When the chat message is completed and saved, the automatic phrase is added to the Conversation frame and the text chat log.
-

Pushing a Web page to a customer

About this task

Push a Web page to a customer's browser, if you decide that a Web page can assist with the contact. Use the Page Push feature to push a Web page. The customer can also push a Web page to your browser.

Page Push has the following limitations:

- Some Web pages do not appear the same when pushed to another person's browser. For example, in case of Web pages that can be personalized to display weather or news, each person sees their own version of the page.
- Dynamic pages that are customized through the use of cookies can appear differently since you and the customer both have separate cookies. Cookies are never shared by you or the customer.
- Framed pages cannot be pushed completely. The URL defining the frameset is pushed, but the individual URLs in each frame are not pushed.
- After a page is pushed, if either you or the customer follows a link to another page, the other person does not see that change.
- If you and the customer both click the **Push the selected web page** icon at approximately the same time, you both see the form that was pushed last. However, both URLs appear in the text chat log.

Procedure

1. Select the **Push the selected web page** icon.

2. Type the URL you want to send.

3. Select the URL to send.

OR

Select a predefined URL to send.

The page is pushed to the customer's browser and the URL is added to the Conversation frame and the text chat log.

Performing a Web Communications transfer to a skillset

Before you begin

- Ensure that the Contact Center License Manager is licensed to provide Multiplicity.
- Ensure that your administrator has selected the **Enable Transfer To Skillset** checkbox in the Web Comms Settings screen.

About this task

You can transfer a Web Communications (WC) contact to a skillset.

Important:

You cannot transfer a contact to a skillset that does not have active agents.

The agent who answers the transferred contact views all the messages that were previously sent by the customer and the previous agent. The agent can also view the transfer details such as:

- the agent who transferred the contact
- the skillset from which the contact is transferred
- the skillset to which the contact is transferred
- the reason for transferring (if the agent who transferred the contact provides the reason)

Procedure

1. Click **Consult/Transfer**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
3. Optionally, enter the reason for transfer under **Transfer Reason**.
The agent that answers the transferred contact can view the transfer details, including the reason for the transfer.
4. Click **Transfer**.

Agent Desktop refreshes the list of agents active on the selected skillset and queues the contact to the selected skillset.

Transferring a chat session

Before you begin

Ensure that the Contact Center License Manager is licensed to provide Multiplicity.

About this task

Transfer a chat session to another available agent. You can transfer a chat session only once.

Procedure

1. Click **Consult**.
 2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.
 3. Click the appropriate agent name.
 4. Click **Consult**.
The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the transfer.
 5. Click **Complete Transfer**.
The chat session is now transferred to the other agent and it is no longer displayed on your Agent Desktop. Your status is set to Ready.
-

Conferencing a chat session

Before you begin

Ensure that the Contact Center License Manager is licensed to provide Multiplicity.

About this task

Conference a chat session to another available agent. You can conference only one agent into a chat session.

Procedure

1. Click **Consult**.
2. In the left pane, under **Transfer to**, select the skillset from the drop-down list.

3. Click the appropriate agent name.
 4. Click **Consult**.
The Conversation window splits into two. In the Consult Text Chat window, you can inform the agent about the reason for the conference.
 5. Click **Complete Conference**.
The Consult Text Chat window closes and the original Conversation window reappears. When the agent who was added to the conference begins typing, it is visible to all three participants.
 6. When you want to leave the conference, click **Close**.
A message appears in the Conversation window that indicates when a participant leaves the conference.
-

Observing a chat session

Before you begin

- Ensure that you log on to the Agent Desktop.
- Ensure that you have agent-supervisor privileges.

About this task

An agent-supervisor can observe an agent-customer chat session. When an agent-supervisor start observing a web chat, the agent receives a notification that an agent-supervisor is observing the contact. The agent can continue the conversation without interference from the agent-supervisor. The customer does not receive a notification and is not aware that an agent-supervisor is observing the contact.

Note:

You must log on to the Agent Desktop to observe a chat session.

Procedure

1. On the Agent Desktop Top bar menu, click **Observe**.
The Supervisor Observe window appears.
2. Under **Filter**, select the appropriate Item and Value to get a list of agents. For example, to observe agent-customer chat sessions, select the Item as Contact Type with the Value as Webcomms.
In the **Contacts** list, the red flag indicates the contacts whose intrinsic values are exceeding the threshold defined in the CCMM Administration tool. For more information about configuring intrinsics, see *Avaya Aura® Contact Center Server Administration* (NN44400-610).
3. Click the contact to view the intrinsics for that contact.

The intrinsic values are assigned with priority 1 to 5. Contacts exceeding threshold limits for high priority intrinsic values, appear higher in the **Contacts** list.

*** Note:**

You must configure intrinsic priorities in the CCMM Administration tool. For more information about configuring intrinsic values, see *Avaya Aura® Contact Center Server Administration* (NN44400-610).

4. Click the **Observe** button to observe the agent-customer chat session. The Customer Text Chat window appears showing the agent-customer chat session.

*** Note:**

When using the Observe function, you cannot participate in the chat session. Use the barge-in function to participate in the chat session. See [Barging-in a chat session](#) on page 124.

5. When you finish observing the chat session, click **Close**.

Barging-in a chat session

Before you begin

- Ensure that you log on to the Agent Desktop.
- Ensure that you have agent-supervisor privileges.

About this task

An agent-supervisor can participate in an agent-customer chat session.

*** Note:**

You must log on to the Agent Desktop to barge-in on a chat session. You can barge-in on a chat session only after you have observed that chat session.

Procedure

1. On the Agent Desktop Top bar menu, click **Observe**. The Supervisor Observe window appears.
2. Under **Filter**, select the appropriate Item and Value to get a list of agents. For example, to observe agent-customer chat sessions, select the Item as Contact Type with the Value as Webcomms. In the **Contacts** list, the red flag indicates the contacts whose intrinsic values are exceeding the threshold defined in the CCMM Administration tool. For more

information about configuring intrinsic priorities, see *Avaya Aura® Contact Center Server Administration* (NN44400-610).

3. Click the contact to view the intrinsic priorities for that contact.
The intrinsic priorities are assigned with priority 1 to 5. Contacts exceeding threshold limits for high priority intrinsic priorities, appear higher in the **Contacts** list.

 Note:

You must configure intrinsic priorities in the CCMM Administration tool. For more information about configuring intrinsic priorities, see *Avaya Aura® Contact Center Server Administration* (NN44400-610).

4. Click the **Barge-in** button to participate in the agent-customer chat session.

 Note:

The **Barge-in** button for an agent is enabled only after you observe the agent's chat session. To observe a chat session, see [Observing a chat session](#) on page 123.

The Customer Text Chat window appears showing the agent-customer chat session.

5. In the **Text** box, type your message to the customer.
6. Click **Send**.
Your name or agent label appears before your message in the Conversation frame.
7. When your conversation is complete, click **Close**.
The agent-customer chat session continues until all agents\agent-supervisors have left the chat session or until the customer leaves the chat session.

Ending the Text Chat session

About this task

End the text chat session when the contact is completed. The text chat history is saved automatically and can be printed.

Procedure

1. Click **Finish**.
2. In the **Notes** box, type additional information about the contact.
3. If Closed Reasons are required, select one of the configured **Closed Reason** codes that best describes the reason you closed your text chat session.

4. Click **Close**.
 5. Repeat step 1 to step 4 to close each additional Web communications contact.
-

Sending the chat log in an e-mail message

About this task

If your Contact Center is licensed for e-mail, you can send a copy of the completed text chat log by e-mail to the customer.

Procedure

Below the Conversation window, select the **Envelop** icon or the check box next to it, to e-mail the chat log to the customer.

Chapter 15: Instant Messaging

Use the Avaya Aura® Agent Desktop Instant Message (IM) window to communicate with customers over the Internet in real time. You can use the Instant Message window to perform the following tasks:

- Accept an instant message
- Decline an instant message
- Send an instant message
- Use an auto-phrase
- Use suggested Web pages
- Check the spelling of an instant message
- View personnel using Contacts Presence
- Add or delete a contact from Contacts Presence
- Send an instant message using Contacts Presence
- Consult on an instant message
- Conference an instant message
- Transfer an instant message
- End an instant message

To perform any task with an agent, select an agent from your contacts list in the **My Contacts** tab or an agent from an Instant Experts group in the **CC Contacts** tab.

When you request a Consult, Conference, or Transfer with another agent, the text that you type appears in a separate conversation window that is not visible to the customer. During the request, you can change a Consult or a Transfer to a Conference, or you can Close the request. When the other agent accepts a Conference or Transfer request, the conversation resumes in the Agent Desktop Conversation window.

Using Contacts Presence you can view all or a subset of the personnel in your Contact Center, according to their current status (for example, Available, Busy, Do Not Disturb, Inactive, Offline, or Away). Presence information is provided either by the Presence Services server or Microsoft Office Communications Server.

Prerequisites for instant messaging

- Ensure that your Contact Center is SIP-enabled.
- Ensure that both you and the customer use Web browsers that work with JavaScript and frames.

 Note:

Support is not available for microbrowsers or portable devices.

Accepting an instant message

Before you begin

- Ensure that you work with the Presence Services server or Office Communications Server in your Contact Center.
- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling instant messages.

About this task

Accept an instant message request to communicate with a customer. When an instant message contact is routed to you, it appears in the **Telephony** toolbar. The **Accept** and **Reject** buttons flash.

 Note:

When you work with a Call Force Presentation Class, Agent Desktop accepts contacts automatically, except in case of Instant Message (IM) contacts. You always must manually accept IM contact types.

Procedure

On the new IM work item, click **Accept**.

The top pane of the Agent Desktop shows the customer details and history of all past interactions between the customer and the Contact Center. The bottom pane shows the text window and the tools available for instant messages.

Declining an instant message

About this task

Decline an instant message request when you are not able to handle the IM request.

Procedure

On the work item, click **Reject**.
The contact is placed back in the queue.

Sending an instant message

About this task

Send a response to an instant message that you accepted from a customer.

Procedure

1. In the text box, type your message to the customer.
 2. Review your messages before you send them by using the scroll bars, if necessary.
 3. Click **Send**.
Your name or agent label appears before your message in the Conversation frame.
-

Using an auto-phrase

About this task

Use an automatic phrase to add commonly used text to an instant message. The administrator defines automatic phrases using the Contact Center Multimedia Administrator.

Procedure

1. In the Conversation window, click **Suggest Phrase**.
2. Click the automatic phrase to use from the list.

The automatic phrase is added to the Conversation preview window.

3. Edit the text if necessary.
 4. Click **Send**.
-

Using suggested Web pages

About this task

Use a suggested Web page to add a commonly used Web page URL to an instant message. The administrator defines suggested Web pages using the Contact Center Multimedia Administrator.

Procedure

1. In the Conversation window, click **Suggest Web Page**.
 2. Click the Web page you want to use from the list.
The Web page is added to the Conversation preview window.
 3. Click **Send**.
-

Using spelling checker in an instant message

About this task

Use the spelling checker to check spelling before you send an instant message.

Procedure

1. In the Conversation window, click the **SpellCheck** icon.
2. If the spelling checker highlights a word that is not found in the dictionary, perform one of the following steps:
 - Click **Ignore** to keep the original spelling of the word.
 - Click **Ignore All** to keep the original spelling of all instances of the word.
 - Click **Add** to add the selected word to the dictionary.
 - Click **Replace** to replace the word with the suggested text.
 - Click **Replace All** to replace all instances of the word with the suggested text.

- Click **Options** to configure conditions for the spell check feature, such as ignoring words with digits or words in uppercase.
 - Click **Cancel** to terminate the spell check.
3. When the spell check is complete, click **Send**.

Viewing personnel using Contacts Presence

About this task

View personnel in your Contact Center using Contacts Presence. You can view all or a subset of the personnel in your Contact Center, according to their current status (for example, Available, Busy, Do Not Disturb, Inactive, Offline, or Away).

Contacts presence control has two tabs: **My Contacts** and **CC Contacts**.

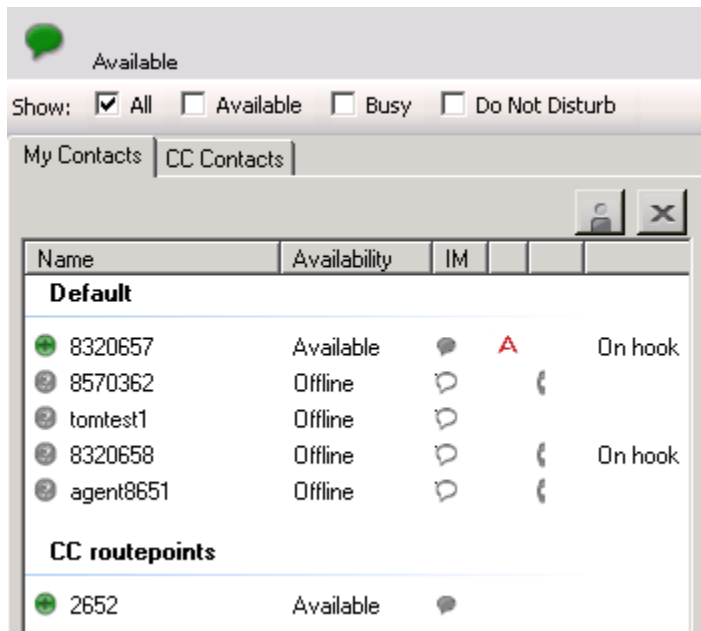


Figure 6: Example of My Contacts tab

The **My Contacts** tab lists contacts that you configure with the Presence Services server or Microsoft Office Communicator (OC). The **CC Contacts** tab lists the Instant Experts groups that a site administrator configures. Using Contacts Presence you can:

- Add a new contact (Presence Services only)
- Delete an existing contact (Presence Services only)
- Send an instant message
- Transfer an instant message

- Consult on an instant message
- Conference an instant message

If you are using the Presence Services server, Contacts Presence provides additional functionality such as click-to-chat and click-to-call. Using these functions you can click the respective icons to instantly place a call or send an Instant Message to an agent. If a contact in the list is using a Presence/IM client that publishes its phone state, you can also see the agent's phone status whether it is On-hook, Off-hook, or On a call. However, not all supported client software publish the phone state. The agent's phone status is updated only when the agent's state is changed. For example, If an agent's phone status is "On a call", it changes to "On-hook" only after the agent's state is changed to "Available".

You can view additional information about the other agents, if the agent is using the Avaya Aura® Agent Desktop. Hovering over the agent's name displays a tool tip containing additional information about the agent such as the contact type the agent is handling, whether the agent is multimedia enabled, and the agent's status (Ready / Not Ready).

The following table shows the My Contacts tab icons.

Table 9: Contacts Presence controls

Control	Function
	Add Contact
	Delete Contact
	Click-to-chat Black icon indicates that you can contact the agent through Instant Messaging. White icon indicates that you cannot contact the agent through Instant Messaging. Hovering over the icon shows a tooltip containing the agent's Instant Messaging address.
	Agent Indicates that the agent is using the Avaya Aura® Agent Desktop.
	Click-to-call Black icon indicates that you can contact the agent through a voice call. White icon indicates that you cannot contact the agent through a voice call. Hovering over the icon shows a tooltip containing the agent's phone number.

A site administrator can configure default Instant Experts groups to load automatically after you log on to the Agent Desktop. The name of the default Instant Expert groups begin with an underscore, for example, _autoload. Other skillset-associated and keyword-associated Instant Experts groups appear after you accept an incoming contact or when you click on a highlighted keyword in the text of a chat conversation. The default Instant Experts groups appear first in the list of groups.

After confirming that a contact is available by using Contacts Presence, you can send, consult on, transfer, or conference an instant message to the contact.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. To view your contacts, click the **My Contacts** tab.
 3. To view Instant Experts groups, click the **CC Contacts** tab.
-

Adding a new contact in Contacts Presence

About this task

If you are using Presence Services server, you can add a contact to the My Contacts list.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. Click the **My Contacts** tab.
 3. To add a new contact click the **Add Contact** icon.
The Add a contact window appears.
 4. In the **ID** field, enter the username of the agent account created in the System Manager.
 5. In the **Combo** box, enter a new group name or select an existing group name to add the new contact to an Instant Experts group. Leave this field blank to add the new contact to the default group.
 6. Click **Add**.
-

Deleting a contact from Contacts Presence

About this task

If you are using Presence Services server, you can delete a contact from the My Contacts list.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.

2. Click the **My Contacts** tab.
 3. Click the appropriate contact from the My Contacts list.
 4. Click the **Delete Contact** icon to delete the contact.
-

Sending an instant message using Contacts Presence

About this task

Send an instant message to a person after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. To send a message to an agent from your list, click the **My Contacts** tab.
Or
To send a message to an agent from an Instant Experts group, click the **CC Contacts** tab.
 3. Select the name of the person you want to send the instant message to, after confirming that they are available.
 4. Click the **Click-to-chat** icon or right-click the name of the person and click **Send an Instant Message**.
A new Conversation window appears.
 5. In the text box, type your message to the agent.
 6. Click **Send**.
Your name or agent label appears before your message in the Conversation frame.
-

Transferring an instant message using Contacts Presence

About this task

Transfer an instant message to another person, after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. To transfer a message to an agent from your list, click the **My Contacts** tab.
Or
To transfer a message to an agent from an Instant Experts group, click the **CC Contacts** tab.
 3. Select the name of the person you want to send the instant message to, after confirming that they are available.
 4. Right-click the name of the person and click **Transfer**.
The person you want to transfer the instant message to must click **Accept**. The current instant message text then appears in that person's Conversation window.
 5. Click **Complete Transfer**.
The instant message is now transferred to the person and it is no longer displayed on your Agent Desktop.
-

Consulting on an instant message using Contacts Presence

About this task

Consult on an instant message with another person after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. To consult an agent from your contacts list, click the **My Contacts** tab.
Or
To consult an agent from an Instant Experts group, click the **CC Contacts** tab.
 3. Select the name of the person you want to send the instant message to, after confirming that they are available.
 4. Right-click the name of the person, and then click **Consult**.
The person you want to consult must click **Accept**. The current instant message text then appears in that person's Conversation window.
 5. When your consultation is complete, click **Close**.
-

Conferencing an instant message using Contacts Presence

About this task

Conference an instant message with another person after you confirm that the person is available by using Contacts Presence.

Procedure

1. On the Agent Desktop, click **Contacts Presence**.
 2. To conference with an agent from your contacts list, click the **My Contacts** tab.
Or
To conference with an agent from an Instant Experts group, click the **CC Contacts** tab.
 3. Determine the person with whom you want to have a conference with, and confirm that they are available.
 4. Right-click the name of the person, and click **Conference**.
A new Conversation window appears.
 5. Click **Complete Conference**.
The new Conversation window closes and the original Conversation window reappears. When the person who you have added to the conference begins typing, the participant list above the text displays updated contact information for all participants in the conference.
 6. To leave the conference, click **Close**.
A message in blue appears in the Conversation window, which indicates when a participant leaves the conference. The departure is added as an Action to the Contact History.
-

Transferring an instant message using the work item control

About this task

Transfer an instant message to another available agent using the work item control.

Procedure

1. On the work item, click the **Transfer** control.
 2. Select the name of the person you want to send the instant message to, after confirming that they are available.
 3. Right-click the name of the person and click **Transfer**.
The person you want to transfer the instant message to must click **Accept**. The current instant message text then appears in that person's Conversation window.
 4. Click **Complete Transfer**.
The instant message is now transferred to the person and it is no longer displayed on your Agent Desktop. Your status is set to Ready.
-

Consulting on an instant message using the work item control

About this task

Consult on an instant message with another available person using the work item control.

Procedure

1. On the work item, click the **Conference** control.
 2. Select the name of the person you want to send the instant message to, after confirming that they are available.
 3. Right-click the name of the person and then click **Consult**.
The person you want to consult with must click **Accept**. The current instant message text then appears in that person's Conversation window.
 4. When your conversation is complete, click **Close**.
-

Conferencing an instant message using the work item control

About this task

Conference an instant message to another available agent using the work item control.

Procedure

1. On the work item, click the **Conference** control.
 2. Select the name of the person you want to send the instant message to, after confirming that they are available.
 3. Right-click the name of the person and click **Conference**.
A new Conversation window appears.
 4. Click **Complete Conference**.
The new Conversation window closes and the original Conversation window reappears. When the person who you have added to the conference begins typing, the participant list above the text displays updated contact information for all participants in the conference.
 5. When you want to leave the conference, click **Close**.
A message in blue appears in the Conversation window, which indicates when a participant leaves the conference. The departure is added as an Action to the Contact History.
-

Ending an instant message

About this task

End an instant message when the contact is complete.

Procedure

- Click **Close**.
-

Chapter 16: Using Agent Greeting

The Agent Greeting feature allows you to pre-record greetings. The system plays the greeting automatically when you answer a call.

Agent Greeting has the following additional benefits:

- your greeting is consistent for all callers
- you get time to prepare for the call

Logging on to the Agent Greeting recording application

Before you begin

- Check with your administrator that you have access to the Agent Greeting application.

About this task

Log on to the Agent Greeting recording application to record your default greeting. You can use the Avaya Aura® Agent Desktop (AAAD) softphone to log in to Agent Greeting.

Using Agent Desktop, press the **Agent Greeting** button, which automatically makes a call to the Agent Greeting recording application. Alternatively, you can type the Agent Greeting recording number and invoke the **Originate Call** option. If you use Agent Desktop to make calls, you can enter your login ID and password by using the DTMF option on AAAD.

* Note:

Agent Desktop does not support transferring or conferencing the Agent Greeting recording call.

Procedure

1. On your telephone, dial the number of the Agent Greeting application (If you do not know this number, ask your Contact Center administrator).
The Agent Greeting application plays a welcome prompt and prompts you for your agent ID.
 2. Using your telephone keys, enter your agent ID followed by pound (#).
The Agent Greeting application prompts you for your password.
 3. Using your telephone keys, enter your agent password followed by (#).
The application plays the main menu.
-

Changing your Agent Greeting password

Before you begin

- Log on to the Agent Greeting application.

About this task

This procedure describes how you can change your Agent Greeting password.

Procedure

1. From the **Agent Greeting** main menu, select 8 to reach the **Password Change** menu.
 2. When the application prompts you, enter your old password using your telephone keys.
 3. When the application prompts you, enter your new password using your telephone keys.
 4. When the application prompts you, enter your new password again using your telephone keys.
The application plays back a message confirming that your password has been changed.
-

Recording your default greeting

Before you begin

- Log on to the Agent Greeting application.

About this task

Record your default greeting, which the system plays to voice contacts on skillsets for which you have not recorded a skillset-specific greeting. You must record a default greeting before the system allows you to record skillset-specific greetings.

The first time you log in to Agent Greeting, the application automatically prompts you to record your default greeting.

Procedure

1. From the **Agent Greeting** main menu, select 2 to reach the default greeting option.

2. When the application prompts you to record your default greeting, select 1.
3. Record your greeting.
4. Select (#) to return to the main menu.

If you want to change your recording, you can record it again. See [Re-recording a greeting](#) on page 145.

Recording the Time of Day greetings

Before you begin

- Log on to the Agent Greeting application.

 Note:

You can set Time of Day greetings only in a Contact Center Manager Administration configuration.

About this task

The Time of Day greeting recording menu allows you to select the time of day greeting you want to record, delete, or playback.

Procedure

1. From the **Agent Greeting** main menu, select 1 to record the Time of Day greeting.
2. Select 1 to review your morning greeting.
Or
Select 2 to review your afternoon greeting.
Or
Select 3 to review your evening greeting.

After you have selected the Time of Day greeting, the application presents the standard greeting menu with options to record, playback, or delete (if the greeting is already recorded) a greeting.

3. Select (#) to return to the main menu.
-

Recording skillset-specific greetings

Before you begin

- Log on to the Agent Greeting application.

About this task

Skillset-specific greetings are played back when you answer calls specific to a skillset. If your supervisor has not recorded skillset tags for your skillsets, then the Agent Greeting recording application identifies the skillsets by the skillset ID number.

Procedure

1. From the **Agent Greeting** main menu, select 4 or 6 to navigate to the skillset.
 2. Select 2 when you reach the required skillset.
 3. Select 1 to record a new greeting.
 4. Record your greeting.
 5. Select (#) to return to the main menu.
If you want to change your recording, you can record it again. See [Re-recording a greeting](#) on page 145.
-

Deleting skillset-specific greetings

Before you begin

- Log on to the Agent Greeting application.

About this task

This procedure describes how you can delete a skillset-specific greetings.

Procedure

1. From the **Agent Greeting** main menu, select 4 or 6 to navigate to the skillset.
 2. Select 2 to choose the greeting.
 3. Select 76 on your phone to delete your greeting.
 4. Select (#) to return to the main menu.
-

Identify skillset IDs to record skillset tags

Before you begin

Ensure that you have a license for the Report Creation Wizard.

About this task

You must identify the skillset IDs before you can record skillset tags for those skillset IDs.

You can obtain these from the Contact Center Manager Administration Historical Reports. The report is Sample Reports – SIP_CC – Voice Skillset Name ID Mapping.rpt.

Procedure

1. Log on to Contact Center Manager Administration.
 2. From the **Launchpad**, click **Historical Reporting**.
 3. In the left pane, click the Contact Center Manager Server on which to create, edit, or view the Report Creation Wizard report.
 4. From the **Report** menu, select **Report Creation Wizard**.
 5. Click **Import to Historical Reporting**.
 6. In the Import window, in the **Report Title** box, type the name for the report. The name appears in **Historical Reporting**.
 7. Click **Browse**.
 8. In the Open RCW Report dialog box, browse to and select the Sample Reports – SIP_CC – “Voice Skillset Name ID Mapping.rpt report to import.
 9. Click the **Report Options** header.
 10. From the **Report Group** list, select the standard report folder into which you import the report. For private reports, you import the report into your private folder.
 11. In the **Select Server** list, select the servers to which to import the report.
 12. Click **Import**.
 13. Navigate through the reports till you find the Sample Reports – SIP_CC – “Voice Skillset Name ID Mapping.rpt report.
 14. Click **Run Now**.
The report runs and you can look for the required voice skillset name ID mapping.
-

Recording skillset tags

Before you begin

- Log on to the Agent Greeting application.
- Find out the skillset IDs for which you want skillset tags. See [Identify skillset IDs to record skillset tags](#) on page 143.

Note:

You must be a supervisor or an agent-supervisor to record skillset tags.

About this task

Agent-supervisors can record skillset tags to provide agents with a skillset name when they browse the skillset in the Agent Greeting Recording application.

If the supervisor does not record tags, the Agent Greeting application plays back only the skillset ID in the **Record Skillset** menu. If the skillset tag is recorded, the agents hear the skillset name recorded by the supervisor instead of the skillset ID number.

Supervisors can record the skillset tags for all skillsets.

Agent-supervisors can record the skillset tags only for the skillsets assigned to that agent-supervisor.

Procedure

1. From the **Agent Greeting** main menu, select 4 or 6 to navigate to the skillset.
2. Select 3 when you reach the required skillset.
3. Select 1 to record a new skillset tag.
4. Record your greeting.
5. Select (#) to return to the main menu.

If you want to change your recording, you can record it again. See [Re-recording a greeting](#) on page 145.

Playing back a greeting

Before you begin

- Log on to the Agent Greeting application.

About this task

This procedure describes how you can play back a greeting.

Procedure

1. Navigate to a particular skillset, Time of Day, or default greeting option.
 2. Select 2 to listen to your greeting.
 3. Select (#) to return to the main menu.
-

Re-recording a greeting

Before you begin

- Ensure you have a recorded greeting.

About this task

This procedure describes how you can re-record a greeting.

Procedure

1. Delete the skillset-specific recorded greeting. See [Deleting skillset-specific greetings](#) on page 142.
 2. Record your greeting again. See [Recording your default greeting](#) on page 140 and [Recording skillset-specific greetings](#) on page 142.
-

Interrupting a greeting

Before you begin

- Ensure that your status is set to Ready.
- Ensure that Agent Greeting is enabled and you have greetings recorded.
- Ensure that Contact Center Manager Administration is configured to allow an agent to interrupt greeting.

About this task

While a greeting is being played back for a call, you can interrupt the greeting. The greeting stops playing and you can start talking with the customer.

Procedure

1. On the Agent Desktop, the `Playing Agent Greeting` message appears when an agent greeting is being played for an incoming call. Select the work item and click the **Accept** work item control.
 2. While the agent greeting is being played, select 83 on your phone or Agent Desktop DTMF keypad, to interrupt the greeting.
-

Chapter 17: High Availability

Avaya Aura® Agent Desktop (AAAD) supports High Availability for fault tolerant and resilient contact center solutions. In High Availability contact centers, Avaya Aura® Agent Desktop connects to multiple Contact Center servers. If one of the Contact Center servers fails or is shut down for maintenance, your Agent Desktop software switches over to the remaining Contact Center servers and continues working.

Normally, you do not notice a server switchover, you remain logged on and you continue handling customer phone calls without interruption. The Agent Desktop multimedia contacts list refreshes during a server switchover and this causes a short delay before new multimedia contacts arrive. In limited circumstances, Agent Desktop experiences a short delay during server switchover and if this occurs you must log on again after the switchover. Phone calls in progress with a customer are not affected by a switchover.

The following procedures describe how to handle Avaya Aura® Agent Desktop in a High Availability contact center.

Handling loss of desktop phone control

About this task

Normally you use Avaya Aura® Agent Desktop software to control your desktop phone and to handle customer phone calls. If Agent Desktop is unable to control your desktop phone, use your desktop phone to continue handling customer phone calls. Do not attempt to use Agent Desktop to handle customer phone calls. When Agent Desktop regains control of your desktop phone, a message box appears to inform you that AAAD can now be used again for telephony operations.

Procedure

1. If Agent Desktop displays a **Please use your phone for telephony operations. A message will appear when AAAD control returns** message box, show the message to your supervisor.
2. On the message box, click **OK**.
3. Continue to handle customer phone calls using your desktop phone. Do not attempt to use Agent Desktop to handle customer phone calls.
4. When the **AAAD can now be used again for telephony operations** message box appears, click **OK** and use Agent Desktop to handle customer phone calls.

Handling multimedia contact refreshes during a switchover

About this task

Avaya Aura® Agent Desktop software supports multimedia contacts such as e-mail, Instant Message (IM), web chat, and fax messages. AAAD also supports a licensed multiplicity feature. Multiplicity is the ability to handle multiple concurrent contacts. At any one time you can be active on both a voice and multimedia contact. However, when one contact is active; the others are automatically placed on hold.

If a Contact Center server switchover occurs, you may notice that all of your Agent Desktop contacts refresh; they are removed and recreated in Agent Desktop after the switchover. This contact refreshing may take a few seconds, depending on the number of contacts you have open. During the contact refreshing period you cannot use Agent Desktop to handle multimedia contacts, but you can continue to handle customer voice calls using your desktop phone. When the contacts have refreshed, the contact open time is correct and typed contact information is still present. If you were typing an e-mail reply when the switchover occurred, your unfinished e-mail is preserved and you can continue typing from where you were interrupted. You can continue to handle customer contacts using Agent Desktop as normal.

Procedure

1. If Agent Desktop starts to refresh the contacts in your Work Item list, do not use Agent Desktop. Stop typing and allow Agent Desktop to completely refresh the contacts Work Item list.
 2. If you are handling a customer voice contact, continue to handle the phone call using your desktop phone.
 3. When the contacts Work Item list has fully refreshed, confirm that all your contacts are still open and continue handling multimedia and voice contacts using Agent Desktop.
-

Handling server communication issues

About this task

Avaya Aura® Agent Desktop connects to multiple Contact Center servers. In the event that the connection to the servers is lost, AAAD repeatedly attempts to reconnect. If you are forced to exit Agent Desktop as a result of server communication issues, all multimedia contacts such

as e-mail, Web chats and IM are lost. You can continue to handle phone calls using your desktop phone while server communication is lost.

Procedure

1. If Agent Desktop shows a **CCT Session Disconnected** message box, show the message to your Supervisor.
 2. On the message box, click **Dismiss** and continue to handle phone calls using your desktop phone.
 3. If Agent Desktop shows a **Server Error - Failed to connect to the CCMM Server** message box, show the message to your Supervisor.
 4. On the message box, click **Dismiss** and continue to handle voice contacts.
 5. AAAD continues attempting to reconnect with the server. On successful reconnect you may need to login again.
 6. If AAAD repeatedly fails to reconnect with the server, speak with your Supervisor and if necessary click **Exit Application**.
-

Handling configuration issues when launching Avaya Aura® Agent Desktop

About this task

In multimedia solutions, AAAD is downloaded from and connects to one or more Contact Center Multimedia (CCMM) servers. In voice-only solutions, install the Agent Desktop Telephony Toolbar on the Communication Control Toolkit (CCT) server. AAAD is then downloaded from and connects to one or more CCT servers.

When launched, AAAD attempts to connect to the default server and download the configuration file. In High Availability solutions, if AAAD is unable to access the configuration file on the default server it attempts to access the configuration files on the other servers. If AAAD can access the configuration files on another server it displays a message box. The agent can choose to accept the configuration settings for that server or choose to attempt to connect to another server.

Procedure

1. If Agent Desktop displays a **Configuration Settings Error** message box, show the message to your Supervisor.
2. If you wish to accept the configuration settings from the server specified, on the **Configuration Settings Error** message box click **OK**.

3. If you do not wish to accept the configuration settings for the server specified, on the **Configuration Settings Error** message box click **Cancel**.
 4. In the **CCMM Server Error** message box a list of available servers is displayed. Choose which server you want to connect to and click **Connect**.
 5. If the problem persists, speak with your Supervisor.
-

Chapter 18: Agent Statistics

Avaya Aura® Agent Desktop displays live skillset-related statistics. Agents can display assigned skillset statistics in a pie or a bar chart format. Supervisors can display statistics for all skillsets. This chapter describes how to use the **Statistics** tab.

Agent Desktop Statistics are generated by accessing the Contact Center Web Statistics (CCWS) on the Contact Center Manager Server (CCMS).

The main **Statistics** tab parts are:

- **Control:** Used to select charts types
- **Skillsets:** Used to display and select skillsets
- **Charts:** Used to display charts

Control:

- **Refresh:** Reloads and resets the skillsets list in the skillset area.
- **Sort:** Alphabetical sort of skillset icons. Due to contact type prefixes on the skillsets names the skillsets are also sorted by contact type.
- **Pie/Bar:** Dynamically changes between pie and bar charts in the chart display area.
- **Agents Available:** Displays the number of agents available.
- **Agents Not Ready:** Displays the number of agents not ready.
- **Max Wait Time:** Displays the maximum time (in seconds) the customer has to wait before being connected to an agent.
- **Calls Waiting:** Displays the number of waiting calls.
- **Alerts:** Activate or de-activate Outlook style alerts for skillsets, whose Service Level falls below the threshold defined in Contact Center Manager Administration.

Skillsets:

Displays a skillset icon for each available or assigned skillset. Supervisors in a multimedia environment see all skillsets. Selecting a skillset icon updates the chart with the latest statistics for that skillset.

The percentage figures on the skillset icons represent the current Service Level for the skillset. The icons change to red if the current Service Level fails below the threshold defined in Contact Center Manager Administration.

Charts:

The chart area displays a pie or bar chart.

Prerequisites for Agent Statistics

- Ensure that you have enabled the Contact Center Web Statistics on the CCMS server.

 Note:

Support is not available for microbrowsers, such as those available for Win CE 2.0, WinTV, PDAs, or other portable devices.

 Note:

Web Statistics requires Contact Center Multimedia. If you are using Agent Desktop Telephony Toolbar, this feature is not available.

Accessing the Agent Statistics tab

Before you begin

- Ensure that your status is set to Logged on.

About this task

Access the **Agent Statistic** tab to define and view agent and skillset charts.

Procedure

1. On the Agent Desktop Top bar, click **User Preferences**.
 2. Select the **Statistics** tab, to display the **Agent Statistics** tab and controls.
-

Viewing the Skillset statistic chart

Before you begin

- Ensure the agent is a member of all necessary skillsets.

About this task

View the skillset statistics chart to monitor statistics for the current skillset.

Procedure

1. On the Agent Desktop **Statistics** tab, select **Contacts**.
 2. In the **Skillset** control, select the skillset to see the statistics.
A chart is displayed in the chart area showing the statistics.
 3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.
-

Viewing the Agent statistic chart

About this task

View the agent statistics chart to monitor statistics for agents in a skillset.

Procedure

1. On the Agent Desktop **Statistics** tab, select **Agents**.
 2. In the **Skillset** control, select the skillset for which you want to see the agent-related statistics.
A chart is displayed in the chart area showing the statistics.
 3. You can toggle between a pie chart and a bar chart by clicking the **Pie/Bar** button on the main **Statistics** tab.
-

Changing the Agent statistic chart properties

About this task

Use the VuStats window to change the display interval and refresh interval for Agent statistic charts.

Procedure

1. Launch the Agent Desktop and log into Elite.
2. Click on **Agent Statistics** to launch the VuStats window.
3. Click the **Settings** icon.
4. Type the number of seconds in the **Display Interval** box.
5. Type the number of seconds in the **Refresh Interval** box.

6. Click **Save Settings**.

The system saves the settings for this agent session only.

Variable definitions

Name	Description
<i>Refresh Interval</i>	Use the Refresh Interval box 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.
<i>Display Interval</i>	Use the Display Interval box 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.

Enabling Service Level alerts

About this task

Activate Outlook style alerts for skillsets, whose Service Level falls below the threshold defined in Contact Center Manager Administration.

Procedure

On the Agent Desktop, **Statistics** tab, click the **Alerts** check box to enable Service Level alerts.

If the Service Level for a skillset falls below the threshold defined in Contact Center Manager Administration, an alert message box appears in the bottom right-hand side of the screen. Click this alert box to automatically open the **Statistics** tab on the Agent Desktop.

Using the Statistics Ticker

About this task

The Agent Desktop Action bar contains an **Agent Statistics Ticker**. The **Agent Statistics Ticker** displays assigned skillsets, contacts waiting (in square brackets), and skillset name on a scrolling display that loops every 10 seconds.

Procedure

1. On the Agent Desktop Action bar, click **Agent Statistics** to show or hide the **Agent Statistical Ticker**.
 2. On the **Agent Statistical Ticker**, click the > icon to advance to the next skillset.
 3. On the **Agent Statistical Ticker**, click on any item in the **Ticker** box to display the Agent Desktop **Statistics** page.
 4. To shown or hide **Agent Statistical Ticker**, click the button that appears to the left of the **Agent Statistical Ticker**.
-

Chapter 19: Customer and contact details

Use the Multimedia component to create, search, view, and edit customer and contact details. With Avaya Aura® Agent Desktop, you can perform the following tasks:

- Create a customer record
- Search for a customer
- Add or edit customer information
- Set or clear the barred status for a customer phone number
- View or copy a CCT intrinsic
- View or modify User to User Information
- View customer contact intrinsics
- Run a CCT intrinsic-associated application
- Search for a contact
- Print search results
- View a contact
- Open a contact
- Close contacts (supervisors only)

On the **Customer Details** tab, you can view Communication Control Toolkit (CCT) intrinsics.

 Note:

Voice Contact intrinsics are supported only in a SIP-enabled Contact Center.

 Note:

The Contact History and Screen Pop features require Contact Center Multimedia. If you are using Agent Desktop Telephony Toolbar these feature are not available.

Prerequisites for working with customer and contact details

- Ensure that you have permission to handle multimedia contacts, such as e-mail messages, instant messages, and voice mails.
- Ensure that you have supervisor privileges, if you want to close multiple contacts.

Creating a customer record

Before you begin

- Ensure that you do not have any customer records open.

About this task

Create a customer record if the multimedia database does not currently have information about a customer. You can type the information directly into the dialog box, or you can copy text from an open contact into the customer details information.

Note:

You must enter either a telephone number, e-mail address, or SIP URI for a valid customer record. Entering only a customer name does not create a customer record in the database.

Procedure

1. In the Customer Details window, click **Create**.
2. In the **Title** box, select a salutary title for the customer.
3. In the **Last Name** box, type the surname of the customer.
4. In the **First Name** box, type the given name for the customer.
5. In the **E-mail Address** box, type an e-mail address for the customer.

Note:

If you add more than one e-mail address for a customer, you must select a default e-mail address to use when you begin a contact with the customer.

6. In the **SIPUri** box, enter a SIP URI for the customer.
7. In the **Phone Type** box, select the type of phone number.

8. In the remaining telephone number boxes, type the international code, area code, and telephone number.
 9. Click **Save**.
-

Searching for a customer

Before you begin

- Ensure that the Action bar is visible.

About this task

Search for a customer to view or edit customer details, if you want to create or review a customer contact.

You can search for a customer based on one or more of the following criteria:

- First name
- Last name
- Preferred agent (the agent who typically handles the contacts for the customer, based on who created the customer record, who handled the first contact by the customer, or who clicked **Take Ownership** of the customer record)
- Address
- Phone number
- E-mail address
- SIP URI

Procedure

1. Click **Customer Search**.
 2. In the first column, select the criteria to use for the search (for example, last name or phone number).
 3. In the second column, select the logical operators for the search criteria (for example, is or is not).
 4. In the third column, type your search value (for example, Smith).
 5. Click **Search**.
 6. To sort the search results based on a field, click the column heading of the field by which you want to sort.
 7. Double-click the customer record to open.
-

Adding or editing customer information

Before you begin

- Ensure that you do not have any customer records open.

About this task

Add or edit customer information when a change to a customer record is required.

Procedure

1. Click the **Details** tab in the Customer Details pane.
 2. Click **Edit** to change the customer information.
Or
Click **Add** to add new information to the customer details.
 3. Select the information to add or change.
 4. Copy and paste the information from the text of a contact, or type the information into the field.
 5. If you add additional telephone numbers or e-mail addresses, ensure that you select one as the default.
 6. Click **Save**.
-

Setting the barred status for a customer phone number

About this task

Bar a customer phone number, if the customer has requested for the Do Not Call (DNC) facility.

Procedure

1. Click the **Details** tab in the Customer Details pane.
 2. Click **Edit** to change the customer information.
 3. Select the phone number for which the bar status needs to set.
 4. Select the **Barred** check box to tag the phone number as barred.
This phone number cannot be called.
-

Clearing the barred status for a customer phone number

Before you begin

- Ensure that the customer phone number is barred.

About this task

Clear a customer phone number of its barred status.

Procedure

1. Click the **Details** tab in the Customer Details pane.
 2. Click **Edit** to change the customer information.
 3. Select the phone number to be cleared off its barred status.
 4. Clear the **Barred** check box to tag the phone number as not-barred.
This phone number can be called.
-

Viewing a CCT intrinsic

Before you begin

- You must accept a contact.

About this task

View a CCT intrinsic to copy the intrinsic or start an associated application.

Procedure

1. On the Agent Desktop window, click **Customer Details**.
 2. In the **Custom Fields** section, click the **Intrinsic** tab.
The CCT intrinsics appear.
-

Copying a CCT intrinsic

About this task

Copy a CCT intrinsic to use the intrinsic in another application.

Procedure

1. On the Agent Desktop window, click **Customer Details**.
 2. In the **Custom Fields** section, click the **Intrinsics** tab.
 3. Right-click the required CCT intrinsic.
 4. Click **Copy**.
-

Viewing User to User Information

About this task

View the User to User Information (UUI) associated with a work item.

* Note:

User to User Information is not supported when you use Agent Desktop to log on to Avaya Aura® Call Center Elite.

Procedure

On the work item, click **Work Item Details**.
The **User to User Info** appears on the work item.

Modifying User to User Information

About this task

Modify the User to User Information (UUI) associated with a work item.

* Note:

User to User Information is not supported when you use Agent Desktop to log on to Avaya Aura® Call Center Elite.

Procedure

1. On the work item, click **Work Item Details**.
The **User to User Info** appears on the work item.
 2. Double click **User to User Info**.
The UUI data appears on the work item in a text box.
 3. Modify the UUI data and press Enter to associate it with the work item.
-

Viewing customer contact intrinsic

Before you begin

- You must accept a voice contact.

About this task

You can view customer contact intrinsic to identify which default application starts after you accept a voice contact.

Procedure

1. On the Agent Desktop, click **Customer Details**.
 2. In the **Custom Fields** section, click the **Intrinsic** tab.
The default application appears with a check mark, in the **Screen Pops** section.
-

Running a CCT intrinsic-associated application

Before you begin

- You must accept a voice contact.

About this task

If you need an application to manage a voice contact, run a CCT intrinsic-associated application.

Procedure

1. On the Agent Desktop window, click **Customer Details**.
2. In the **Custom Fields** section, click the **Intrinsic** tab.

3. Right-click the required CCT intrinsic value.
 4. Select the required application.
-

Searching for a contact

Before you begin

- Ensure that the Action bar is visible.

About this task

Search for a contact to create or review a customer contact.

You can search for a contact based on one or more of the following criteria:

- Agent (is, is not)
- Last action (is, is not)
- ID (less than, equal to, greater than)
- Subject (contains, begins with, ends with)
- Status (is, is not)
- Closed reason (is, is not) activity code
- Closed date (before, on, after)
- Skillset (is, is not)
- Type (is, is not) of contact
- Disposition code (is, is not)
- Mail To (contains, begins with, ends with)
- Mail From (contains, begins with, ends with)
- Arrival date (before, on, after)

The search results displays the agent who worked most recently on the contact.

If the search, results in more contacts than one page can show, use the arrows to move to the Next, Previous, First, and Last page of the search results.

Procedure

1. Click **Contact Search**.
2. In the first column, select the criteria to use for the search (for example, Status or Skillset).
3. In the second column, select the logical operators for the search criteria (for example, is or is not).

4. In the third column, type your search value (for example, Closed).
 5. Click **Search**.
 6. To sort the search results based on a field, click the column heading of the field by which you want to sort.
 7. Double-click the contact to open.
-

Printing search results

Before you begin

- Ensure that you have a printer set up and that you know the correct printer settings to select.

About this task

You can print the search results of either a customer or contact search.

Procedure

1. Generate the search results for a customer or contact search.
 2. Click **Print**.
 3. Select the correct settings for your printer.
-

Viewing a contact

Before you begin

- Ensure that your status is set to Not Ready.

About this task

View a contact if you want to review information for a contact, for example, to see how an agent handled a particular contact.

You cannot change information in the contact since the contact is not open.

Procedure

1. On the **History** tab of the Customer Details window, select the contact to open.
2. Right-click and select **Read-only Contact**.

You can also double-click a contact to open the contact details.

3. View the contact details on the right pane of the Agent Desktop window.
-

Opening a contact

Before you begin

- Ensure that your status is set to Not Ready.
- Ensure that no other agent is currently working on the contact.

About this task

Open a contact to add or edit information, to complete an outbound call, or to send a reply to an e-mail message.

You can open a contact only if you have ownership of the customer on the contact.

Procedure

1. On the **History** tab of the Customer Details window, select the contact to open.
 2. If **Take Ownership** appears on the **Contact History** tab, another agent currently owns the customer and you cannot open this contact. If necessary, click **Take Ownership** to own the customer and click **Yes** to confirm.
 3. Right-click and select **Pull Contact**.
If the **Pull Contact** item is not available, another agent currently has the contact open and you can only view the contact.
 4. Click **Yes** to open the contact.
The Agent Desktop automatically changes your status to Ready, answers the pulled contact, and then automatically changes your status to Not Ready again.
 5. View the contact details on the right pane of the Agent Desktop window.
You can now complete an outbound call, reply to an e-mail message, or add an attachment to an e-mail message.
-

Closing contacts (supervisors only)

Before you begin

- Ensure that you are a supervisor.
- Ensure that no agent is currently working on any contact that you want to close.

About this task

Supervisors can close contacts, if they want to remove a single contact or a group of contacts, by changing the contact status from Open to Closed.

You must enter a reason for closing contacts.

Procedure

1. Select the contact to close or select multiple contacts by pressing the **Ct r l** key while you click each contact.
Selected contacts are highlighted in blue.
 2. Right-click and select **Close All**.
 3. In the Close Contact Details window, type the reason for closing the selected contacts.
 4. Click **Close**.
-

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