



Avaya Interaction Center

Agent Web Client User Guide

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Chapter 1: Introduction

Purpose

The purpose of this guide is to provide the information about Avaya Agent Web Client.

Intended audience

This guide is for the customers and agents using Avaya Agent Web Client.

Document changes since last issue

The following sections have been modified in this document since the last issue:

- Managing email contacts
- Using resources in an email

Related resources

Documentation

See the following related documents at <http://support.avaya.com>.

Title	Use this document to:	Audience
Avaya Interaction Center and Avaya Operational Analyst Overview and Specification	get information about the new features and enhancements in Avaya Interaction Center.	Sales Engineers Supervisors Business Partners Customers
IC Installation Planning and Prerequisites	get information about the planning and third-party software required to deploy an Avaya Interaction Center system.	Business partners Customers Implementation engineers
IC Installation and Configuration	get information about how to install and configure an out-of-the-box Avaya Interaction Center.	Sales Engineers Supervisors Business Partners Customers
Agent User Guide	get agent-related information about Avaya Interaction Center Agent.	Business partners Customers Agents Supervisors
IC Administration Guide	get information about Avaya Interaction Center (Avaya IC). This guide describes domain and server administration using Avaya IC Manager.	Sales Engineers Supervisors Administrators Business Partners Customers
IC Business Advocate Configuration and Administration	get information about Avaya Interaction Center (IC). This guide describes the administration and configuration of Avaya Business Advocate.	Supervisors Administrators Business Partners Administrators

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AUCC100010695	IC-Siebel Integration
ATC100011017	IC-Siebel Integration, Installation and Troubleshooting

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Chapter 2: Introduction to Avaya Agent Web Client Help

Avaya Agent Web Client is a Web-based agent application that provides a powerful and consistent framework for handling work items across all communication channels.

Avaya Agent Web Client guides you through your tasks based on the work item you select from work lists. The application enables and disables the toolbar buttons, and displays the appropriate windows for the current work item.

The Avaya Agent Web Client online Help is designed to help you become familiar with Avaya Agent Web Client and provide you with the information and procedures you need to handle voice, chat, and e-mail work item.

This section discusses the following topics:

- [Become familiar with the help system](#) on page 16
- [Online Help](#) on page 17

Become familiar with the help system

This section introduces topics that help you become familiar with Avaya Agent Web Client before you handle voice, chat, and e-mail work items.

An introduction to the application: The following topics introduce the application:

- [About Avaya Agent Web Client](#) - Provides an overview of the application.
- [Avaya Agent Web Client work handling panes](#) - Introduces the panes or sections of the Work Management Console that you use while handling work items.
- [Toolbars and menus](#) - Discusses the toolbar panes and how to use them.

How to set up your work environment: When you are ready to set up your individual work environment and start handling work items, see [Managing your work environment](#) on page 52. This topic discusses how to set up your application preferences and start handling work items from the **Agent** menu.

Work Management Console panes: The following topics discuss the remaining panes in Avaya Agent Web Client. They provide more information on how to use the panes as you handle work items:

- [Work Status Summary pane](#) - Discusses the Work Status Summary pane and how to review your work load and work status at a glance.
- [My Work List](#) - Discusses how to select work items and review work item status on work lists.
- [Viewing customer and work item information](#) - Discusses the Details Tab-set that displays information you can refer to when you handle a work item and work with the customer.
 - The **Details** tab displays information about the selected or current work item in a work list. The displayed information depends on the type of work item that you select.
 - The **Customer Contacts** tab displays a list of the recent contacts that the customer has had with the contact center. The summary list includes completed contacts and active e-mail work items that are assigned to another agent or not yet assigned to an agent.
 - The **Work History** tab displays history of the selected work item in chronological order. The history includes routing information for voice and chat work items and detailed tracking information for e-mail work items.
- [Using the status bar](#) - Discusses the status bar and the messages, icons displayed on it.
- [Agent Tools pane](#) - Discusses the toolbars and menus for Agent Assistance Tools.

Online Help

In Avaya Agent Web Client, you can use the **Help** menu or shortcut keys to open Help topics.

The **Help** toolbar menu contains the following options:

- **Avaya Agent Web Client Help** displays the entire online Help system. The contents tree appears in the left pane and the topics appear in the right pane.
- **Voice Help** displays the first help topic for voice work items.
- **Chat Help** displays the first help topic for chat work items.
- **Email Help** displays the first help topic for e-mail work items.

You can also display a help topic for the current window, component, or pane.

This topic discusses the following ways to display Help:

- [Opening the online Help](#) on page 18
- [Opening a help topic for a window, component, or pane](#) on page 18

Opening the online Help

To open the online Help directly

- Press **F1**.
- OR
- Select **Help > Avaya Agent Web Client Help**.

Avaya Agent Web Client also supports context sensitive help for each window and many components and panes.

Opening a help topic for a window, component, or pane

To open a help topic for a window, component, or pane

1. Place the cursor in the window, component, or pane for which you want to see the help.
2. Press **Shift+F1**.

Avaya Agent Web Client displays the Help topic for the window, component, or pane.

3. To continue to view the Avaya Agent Web Client Help system, click **Show Navigation** on the Help toolbar.

The Help system displays the contents tree in the left pane.

4. Select a topic in the left pane.

For more online help shortcut keys, see [General use of keys](#) on page 48.

Chapter 3: About Avaya Agent Web Client

Avaya Interaction Center (Avaya IC) is a complete multi-media system that enables companies to manage high volumes of customer interactions and support a broad range of communication channels.

Avaya Agent Web Client is one of the agent desktop applications included with Avaya IC.

Avaya Agent Web Client is a Web-based application that provides a powerful and consistent framework for handling work items across all channels. With Avaya Agent Web Client, you can handle incoming and outgoing work items for all channels from one work list.

In Avaya Agent Web Client, you can see:

- Common work status icons for all channels
- Common work handling controls for all channels
- Indicators that inform you when time-based actions are required
- An e-mail application that is very similar to your personal e-mail application
- A redesigned address book that is always available and very similar to the address book in your personal e-mail application

Avaya Agent Web Client supports all the agent tasks.



CAUTION:

You can run Avaya Agent Web Client and Avaya Agent from the same system. However, you cannot run both applications at the same time using the same login ID.

Avaya Agent Web Client allows you to interact with customers in the following ways:

- Speak with customers who call your company on the telephone.
- Chat with customers across the Web. During a chat, you can exchange typed messages, send Web page addresses to the customer, help customers in filling Web form, and also allow the customer to involve additional people in the same chat session.
- Read and reply to customer e-mails.

This section discusses the following topics:

- [Avaya Agent Web Client desktop](#) on page 21
- [Work Status Summary pane](#) on page 23
- [My Work List](#) on page 25
- [Chat application](#) on page 30
- [Email application](#) on page 40

- [Resizing the application window](#) on page 45
- [Quick Find](#) on page 46
- [Visual clues](#) on page 47
- [Keyboard operations](#) on page 47

Avaya Agent Web Client desktop

The Avaya Agent Web Client browser window is called the Work Management Console. This window consists of panes or areas of the browser window that you use while you work on voice, chat, and e-mail work items. The Chat and Email applications display in separate browser windows.

Avaya Agent Web Client displays a list of work items that are assigned to you in My Work List. The work list is a central component of Avaya Agent Web Client. The work list allows you to choose the work item you want to handle.

Based on the work item you select, Avaya Agent Web Client enables and disables the related toolbar buttons and windows.

For example, when you select and accept an e-mail, Avaya Agent Web Client enables toolbar buttons for handling an e-mail. The E-mail application is displayed in a separate window that also displays the work handling toolbar. You can use the toolbar buttons to handle e-mails.

This section discusses the following topics:

- [Avaya Agent Web Client work handling panes](#) on page 21
- [Work Status Summary pane](#) on page 23

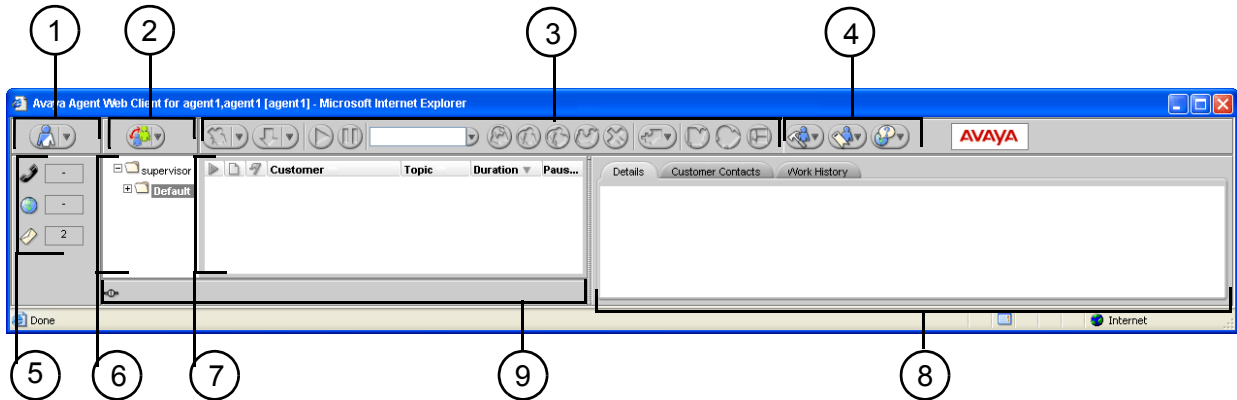
Avaya Agent Web Client work handling panes

You can use the Work handling panes of Work Management Console for handling work items. In these panes, you can select and view the information about voice, chat, and e-mail work items.

Note:

The Chat and Email applications provide work handling panes for chat and e-mail work items. For more information, see [Chat application](#) on page 30 and [Email application](#) on page 40.

You use the following panes identified in the below figure:



Key	Pane	Description
1	Agent Status and Control	Sets your working preferences, agent desktop properties, and your availability for work. For more information, see Managing your work environment on page 52.
2	Supervisor Tools	Supervisor can begin or end the monitoring sessions. Note: <i>Supervisors only.</i> If you are not a supervisor, the button is disabled. For more information, see Monitoring a Chat Session (Supervisors Only) on page 121 and Monitoring an Email Session (Supervisors Only) on page 160.
3	Work Handling toolbar	Displays work handling buttons and menus. For more information, see Work Handling toolbar on page 216.
4	Agent Tools	Displays menus you can use at any time. Displays supporting applications, third-party applications and Web sites, and the online Help system. For more information, see Agent Tools pane on page 225.
5	Work Status Summary	Displays the number of work items for each channel that you have in the work list and the status of each channel. For more information, see Work Status Summary pane on page 23.
6	Supervisor Control	This panel lists the agents in a supervisor's workgroup that are currently logged in.
7	My Work List	Displays a unified list of the work items you are assigned and the current status of each work item. For more information, see My Work List on page 25.

Key	Pane	Description
8	Details Tab-set	Displays information you can refer to when you handle a work item and work with the customer. • The Details tab displays information about the selected or current work item in a work list. The displayed information depends on the type of work item that you select. • The Customer Contacts tab displays a list of recent contacts that the customer has had with the contact center. The summary list includes completed contacts and active e-mail work items that are assigned to another agent or waiting to be assigned to an agent • The Work History tab displays history of the selected work item in chronological order. The tab displays routing information for voice and chat work items and detailed tracking information for e-mail work items. For more information, see Viewing customer and work item information on page 70.
9	Status Bar	Displays information about system and application while you handle work items. It also displays information about whether the client browser and server application are communicating. For more information, see Using the status bar on page 80.

Work Status Summary pane

Avaya Agent Web Client displays a channel icon and work item counter for each channel that you use. Collectively, these fields provide a quick report on the status and health of your channels, the number of work items you have in your work list, and whether you can receive new work.

Note:

If you click the **After Contact Work** (ACW) button on your hard phone, Avaya Agent Web Client does not display a different voice channel icon in the Work Status Summary. If you are setup to complete work after a telephone call, you receives another telephone call after you complete the voice work item.

The Work Status Summary displays same information for all the channels. The following table shows how to interpret the status of a voice work item:

Channel icon	Work item counter	Status	Description
No icon	No number	Unassigned	You are not set up to use the channel.
		Channel is logged out	You are set up to use the channel but you have not yet logged in to the channel. You can select Agent > Log In/Out of a Channel and select the applicable channel to log in.
		Aux Work	You are set up to use the channel but you are now performing auxiliary work.
		Available	You are logged in to the channel and set yourself available for the channel.
		Channel is impaired	A part of the channel cannot operate. The channel is in a recovery process.
		Channel is impaired and delivery is not operating	A part of the channel cannot operate. The channel cannot deliver new work. The channel is attempting to recover.
		Channel failed and delivery is not operating	The channel cannot operate. It cannot deliver new work or recover.

My Work List

The Work Management Console contains My Work List that you can use to handle your voice, chat, and e-mail work items. You can select and activate work items in My Work List.

Each row in the work list relates to a different work item. The work item that you select in My Work List determines which toolbar functions and features Avaya Agent Web Client enables in the rest of the application.

In My Work List, Avaya Agent Web Client displays the following columns:

Column	Ascending sort order
 Current Work Item	Identifies the current work item.
 Channel Type	Identifies the channel of the work item: voice, chat, or e-mail.
 Work Item Status or Lifecycle	Identifies the status of the work item as Alerting, Collaboration, Pause, or Wrap Up.
Customer	Identifies the name, telephone number, e-mail address, or Web alias of a customer. This column is also used to identify e-mail alerts and e-mail messages that are going through quality assurance.
Topic	Identifies the subject of a work item.
Duration	Identifies the length of time since the work item arrived in My Work List. This timer runs continuously until you complete the work item.
Paused	Identifies the length of time that the work item is on hold or the e-mail is deferred.

For information on the icons that display in the work list, see [Understanding work item icons](#) on page 27.

Using My Work List

Avaya Agent Web Client displays voice, chat, and e-mail work items in the My Work List pane.

My Work List has columns of information for each work item. Your Avaya Agent Web Client setup determines the type of supporting information that displays in the list.

Use the work list to:

- Select a work item to preview information in the Details Tab-set pane. For more information, see [Viewing customer and work item information](#) on page 70.
- Select the work item that you want to work on by making it the current work item.

Note:

Work lists are also provided in the Chat and E-mail applications. They offer the same functionality regardless of where you use them, although only chat tasks appear in the Chat application work list and only e-mail tasks in the Email application work list.

Only one work item can be selected and made current across the entire Avaya Agent Web Client application. Therefore, when you make a work item current in one work list, it becomes the current item in all parts of Avaya Agent Web Client.

This section discusses the following topics:

- [Understanding work item icons](#) on page 27
- [Sorting work items in a work list](#) on page 29
- [Resizing My Work List](#) on page 30

Understanding work item icons

Avaya Agent Web Client displays icons in the work list to identify the status of the work items. The icons are the same images that appear on the toolbar button you used to complete the task. For example, when you click **Pause**, the application displays a **Pause** icon in the status column for the work item.

The following table lists the columns and icons that Avaya Agent Web Client displays in My Work List.

Note:

The **Chat** work list and **Email** work list display additional columns and icons. For more information, see [Chat work list](#) on page 34, [Email work list](#) on page 42, and [Email work item icons](#) on page 44

Column	Work item icon	Description
		Identifies the current work item and any voice work item that is voice trailing.
		The Current icon identifies the work item that is current. The current work item is the piece of work that you are actively handling and accumulating work time against. For more information, see My Work List on page 25.
		The Voice Trailing icon identifies that the voice work item is voice trailing. You can use this feature to work on a chat or an e-mail work item, while keeping the talk path to a voice work item. In this case, the chat or e-mail is the current work item, but you can talk with the customer for the voice work item that is in voice trailing. For more information, see Managing voice work items on page 84.
		Identifies the channel of the work item: voice, chat, or e-mail.
		The Voice icon identifies that this is a voice work item.
		The Chat icon identifies that this is a chat work item.

Column	Work item icon	Description
		The Email icon identifies that this is an e-mail work item.
		Identifies the status and information of the Alerting, Collaboration, Pause, and Wrap Up work items.
		The Alerting icon identifies that a new work item has arrived and that you need to accept it.
		When the Collaboration icon blinks, the icon identifies that the conferenced, transferred, or consulted work item is waiting for you to accept it. When the Collaboration icon does not blink, the icon identifies that you are in the middle of conferencing, transferring, or consulting the work item.
		When the Pause icon blinks, the icon identifies that the telephone call is placed on hold. When the Pause icon does not blink, the icon identifies that you deferred the e-mail.
		The Wrap Up icon identifies that the work item is in the wrap up phase. The work item has been released and is waiting to be completed.
Customer		Identifies the customer's name, telephone number, e-mail address or Web alias. This column is also used to identify e-mail alerts and e-mail messages that are going through quality assurance.
Topic		Identifies the subject of an e-mail work item or the initial question from the customer for a chat work item.
Duration		Identifies the length of time since the work item arrived in your work list. This timer runs continuously until you complete the work item.
Paused		Identifies the length of time that the work item is on hold or the e-mail is deferred. The time displays while the Pause icon displays. Avaya Agent Web Client resets the timer when you select Move Conversation during a consultative transfer or a conference.

Sorting work items in a work list

In the Avaya Agent Web Client work lists, you can sort the voice, chat, and e-mail work items. You can sort all your work items based on the column you select and the sort order you select for the column.

Avaya Agent Web Client sorts work items in the default ascending order.

To change the sort order

1. Click the column header.

You can repeat clicking the column header to change the sort order.

The following table lists the order in which Avaya Agent Web Client sorts the work items:

Column	Ascending sort order
 Current Work Item or Voice Trailing Communication	1. Current icon for current work items 2. Voice Trailing icon for voice work item in voice trailing 3. <No Icon> for inactive work items
 Type of Channel	1. Voice icon for voice work items 2. Chat icon for chat work items 3. Email icon for e-mail work items
 Status or Lifecycle information	1. Alerting icon 2. Blinking Collaboration icon for conferenced, transferred, or consulted work items 3. Pause icon for voice work items that are on hold 4. Collaboration icon for conferenced, transferred, or consulted work items 5. <No Icon> for inactive work items 6. Release icon for work items in the wrap up phase 7. Pause icon for a deferred e-mails
Customer	Sorts work items in alphanumeric order (0-9, A-Z)
Topic	Sorts work items in alphanumeric order (0-9, A-Z)

Column	Ascending sort order
Duration	Sorts work items in chronological order based on the Duration time. Work items that you have been working on the longest appear at the bottom of the work list.
Paused	Sorts work items in chronological order based on the Paused time. Work items that have been paused longest appear at the bottom of the work list.

Resizing My Work List

You can resize My Work List vertically or horizontally. Avaya Agent Web Client displays a scroll bar when the number of work items occupies more space than what is available in the work list.

- To resize the height of My Work List, resize the Work Management Console window. Select the upper or lower edge of the window and drag it up or down. The Details Tab-set pane resizes taller or shorter.
- To resize the width of My Work List, select the vertical bar to the right of the work list. Drag the bar to the right or to the left. The Details Tab-set pane resizes narrower or wider.
- To resize the width of a column, select the edge of a column and drag it to the right or the left. As the column width decreases, the column information becomes less visible. Avaya Agent Web Client displays an ellipsis (...) at the end of the visible text. To read the complete information, place the cursor on the column header or over the text of a work item.

Chat application

The Chat application is one of the components of Avaya Agent Web Client where you can handle chat work items.

Depending upon the setup, you can view the Chat application when you log in to Avaya Agent Web Client or you might need to start the Chat application separately.

You can use the Chat application to:

- Send text messages.
- Push Web pages and fill the forms collaborating with the customer.
- Use the chat collaboration features, such as transfer and conference to get help from other agents.
- Use the chat Join-Us feature to invite additional people in a chat session.

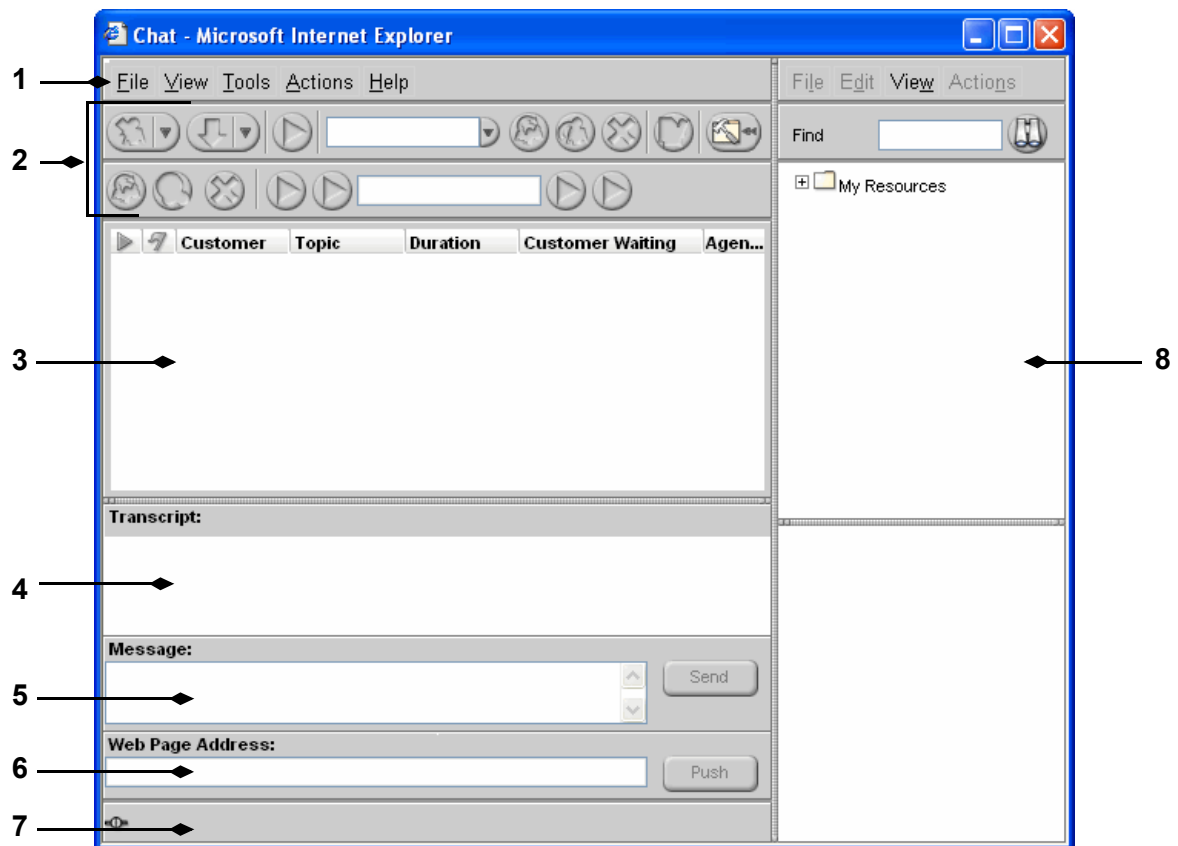
- Become a supervisor and monitor chat sessions.

The work handling controls and components that are available in the Work Management Console are also available in the Chat application. You can use the Chat application to handle all your chat related work items.

This section discusses the following topics:

- [Chat application components](#) on page 32
- [Chat work list](#) on page 34
- [Chat transcript and text entry areas](#) on page 35
- [Join-Us Chat Conference](#) on page 37
- [VOIP Chat](#) on page 38
- [Chat & Callback](#) on page 38
- [Shared Browsing](#) on page 38
- [Collaborative Form Filling](#) on page 39

Chat application components



The Chat application displays the following components:

Key	Component	Description
1	Menu bar	Displays the File , View , Tools , Actions , and Help menus. You can use these menus to handle chat work items.
2	Work Handling toolbar	Displays the buttons that you can use for chat work items. Select a button to complete a task while working with a chat work item. The buttons also appear in the Work Management Console and in the Actions menu of the Chat application. For more information, see Work handling toolbars on page 215.

Key	Component	Description
3	Chat work list	Displays the chat work items that are currently assigned to you. For each work item, the information such as, Customer, Topic, Duration, Customer Waiting, and Agent Waiting is displayed. The Customer Waiting and Agent Waiting columns displays the time period the participant waits for a response. You can select a work item from the work list and make it a current work item. For more information, see Chat work list on page 34.
4	Transcript	Displays the messages that are exchanged during the chat session. The messages are displayed in a chronological order that includes the following information: • The topic or question that a customer has entered • The language of the chat session • The participants' names and messages in the chat session • System information about the chat session • Connection information Note: If you do not have a current or alerting work item, or when the chat application is in the preview mode, the transcript area is empty.
5	Message	An area where you can type or insert the text and resources to send them to other participants.
6	Web Page Address	An area where you can type or insert Web page addresses. You can click Push to send the Web page address to the other participants and open the Web page there. The Web page address is added to the transcript.
7	Status bar	Displays the system and processing messages for the chat work items. On the status bar, you can view the typing status of a customer. Similarly, the customer can view the typing status of an agent. The Status bar displays same messages that are displayed in the status bar of Work Management Console. For more information, see Using the status bar on page 80.
8	Resources pane	Displays a list of available resources under My Resources in the right pane. The resources include predefined set of text messages, Web pages, and so on that you can use for the chat work item. For more information, see Using resources in a chat work item on page 117.

Chat work list

When you open the Chat application from the Avaya Agent Web Client, you can view a list of work items that are only related to chat and that are assigned to you. Each work item is displayed in a separate row.

In the chat work list, you can select a work item and activate it. You can also sort the chat work list by clicking the required column header. For more information, see [Sorting work items in a work list](#) on page 29.

The columns in the chat work list are similar to the columns that appear in the My Work List of Avaya Agent Web Client.

For information on the icons that are displayed in the work list, see [Understanding work item icons](#) on page 27.

The following table lists the columns that Chat application displays in the Chat work list.

Column	Description
 Current Work Item	Identifies the current work item.
 Work Item Status	Identifies the status of the work item, like Alerting , Collaboration , Pause , or Wrap Up .
Customer	Identifies the Web alias or name that customer has entered to log in to the Web site.
Topic	Identifies the initial question that customer has entered for the chat session.
Duration	Identifies the length of time since a chat work item arrived in your chat work lists. The time is updated continuously until you complete the work item.

Column	Description
Customer Waiting	Identifies the length of time that the customer has awaited for your reply to the last message. This timer does not run if you were the last participant to send a message in the chat session. Depending on your setup, the timer might change color and become bold after the wait time exceeds a time limit set by your supervisor.
Agent Waiting	Identifies the length of time that you have waited for a reply to your last message to the customer. This timer does not run if the customer was the last participant to send a message in the chat session. Depending on your setup, the timer might change color and become bold after the wait time exceeds a time limit set by your supervisor.

Chat transcript and text entry areas

You can use the transcript and text entry areas below the work list when you handle a chat work item. You can view and reuse the information in the transcript area during your chat session.

This section discusses the following topics:

- [Transcript](#) on page 35
- [Message](#) on page 36
- [Emoticons](#) on page 36
- [Web Page Address](#) on page 37

Transcript

The **Transcript** field displays a real-time transcript of the chat work item that includes the following information about your conversation and system activity.

When a chat session starts, you see the following:

- The topic or question that the customer entered
- The language used during the conversation
- The name and message of the customer
- Your name and message
- System information about the chat session
- Connection information

Avaya Agent Web Client displays scroll bars when the size of the conversation no longer fits into the **Transcript** field.

Message

The **Message** field lets you type a message that you want to send to the customer.

You can enter text or insert prepared resources, such as Web page, text and so on. You can also enter Emoticons in the message area.

After you complete typing the message, you have to click **Send** to send the message to the customer. Depending on your setup, Avaya Agent Web Client might do a spell check for your message before it is actually sent to the customer.

Emoticons

Emoticons are the iconic representation of the facial expressions, such as smiley, sad, tired, and so on.

You can use the `emoticons.properties` file to configure emoticons. In this properties file you can add new emoticons or update existing. You have to link an image to a sequence of characters.

Note:

If the sequence of characters contains a special character then you have to precede each special character with escape character (`\`). For example, consider the character sequence `x\-\)`. In this example all the special characters except `x` are preceded with the `\`.

The `emoticons.properties` file is located at: `AVAYA-IC-HOME/comp/icm`

You can enter the configured sequence of characters in the message area of chat application and the related image is displayed in the transcript area of all the parties involved in the conversation.

The following table lists the default emoticons and their character sequence that you have to enter in the message area of the chat application:

Emoticons	Character Sequence	Facial Expression
	?-	Ponder
	:(or :-<	Sad
	:)	Smile
	:@	angry

Emoticons	Character Sequence	Facial Expression
	:o	surprised
	:	disappointed
	:U	thankyou
	(Y)	thumbsup
	:8	holdon

For Avaya Agent Web Client, the images of emoticons are stored in the following folder:
Avaya-Webconnector-HOME\WebClient\web\WebContent\images\emoticons.

Web Page Address

Enter Web page addresses in the **Web Page Address** field. Click **Push**. Avaya Agent Web Client displays the Web page in the customer's browser window.

You can push Web page address directly to the customer from the Resources pane. For more information, see [Pushing a Web page address to a customer](#) on page 102.

Join-Us Chat Conference

You may occasionally have a customer who would like to invite one or more people to join the chat session. This type of session is called a Join-Us Conference.

Before initiating a Join-Us Conference, you have to first create a Join-Us handle (user name) and send the handle with a special URL to the concerned person who is going to enter the Join-Us session. After receiving the URL and the handle, that person has to access the URL and enter the handle on the page that is opened. Once the handle is entered, that new person becomes a part of the current chat session and the session is turned to a conference where all of you can share browsers and type messages to each other about what you see.

For example, you have a customer who is considering buying an item on the company website, but wants the advice of his wife before making a decision. So, you suggest the customer to ask his wife to join the session and the customer agrees. You follow the process of creating the handle and convey the URL and instructions to the customer's wife. She goes to that location and enters the handle. The chat client opens on her computer's desktop. Now the three of you can exchange chat messages in a three-way session.

Before you begin, ask your administrator for the URL of Join-Us conferences. For using Join-Us conference, see [Handling Join-Us Conference](#) on page 114.

VOIP Chat

Many customers who are browsing your company's Web site cannot use their telephone while they are connected to the Internet. In this case, if they have a question, they can click a **Chat & VoIP** button so they can continue browsing the Web site while they speak to an agent. If you are enabled to receive such type of contact, the request may be routed to you and appear in your Chat task list. You must initiate the Chat and VoIP feature from the Web Agent.

Note:

Customers must meet certain requirements to be able to engage in a voice chat session with you. When a customer requests a VoIP call, the Avaya IC software sends a dialog box to the customer. The customer can click the **Run Test** button to determine if their computer meets all the requirements. If the customer's computer is unable use VoIP, the customer receives an error message that explains the problem, and Avaya IC offers to submit a regular text chat request for the customer.

After you connect to your chat customer through VoIP, you will speak to the customer over your telephone. For information about handling the VoIP chat request, see [Handling a Chat and VoIP Session](#) on page 112.

Chat & Callback

When a customer is in chat session with you and want to simultaneously talk to you on a phone, the customer can initiate a chat & callback session by clicking the **Chat & Callback** button provided on the Web site.

The Callback enables customers to ask an agent to call them either at a scheduled time or immediately when they are chatting with that agent.

In the scheduled callback, the customer specifies the telephone number and the callback time on the Web page. The agent then calls the customer at the scheduled time.

For information about handling the Chat & Callback request, see [Handling a Chat & Callback Session](#) on page 110.

Shared Browsing

Shared Browsing refers to the features that lets you and your chat customer view the same Web pages at the same time:

- **Auto Sync** – When you click **Auto Sync** and then navigate through a Web site, the browser at your customer end follows your lead and display the same pages simultaneously.

- **Push URL** – When you click the **Push** button in a Chat window, the URL of the page is pushed to your customer. Your customer can see the page displayed in their browser. The customer can also push a page (URL) to you.
- **Collaborative Form Filling** – When you share a Web page with a customer through Push URL or Auto Sync, you can help your customer to fill the forms, such as registration forms, shopping cart pages, and checkout pages.

Note:

You can use the Shared Browsing features when multiple agents are in the session. The first agent in the chat session is in charge of the Auto Sync session. All agents can push pages and fill forms collaborating with each other.

Viewing External Web Sites

Usually when you share a browser with a customer, the customer and you are browsing your company's Web site or a Web site that your company supports. But your customer may want to show you a product on an external Web site (also called an off-domain Web site). Or you may want to show your customer a product on an external Web site to indicate that your company's similar product is better or less expensive.

Using Shared Browsing with an external Web site can sometimes cause problems. A page may not be displayed properly on your browser or your customer's browser. Or the page that is displayed at your side may not exactly match the page that is displayed at the customer side.

Collaborative Form Filling

When you share Web pages with your customer, you can help the customer fill in information on a Web page form. This feature is called Collaborative Form Filling. A form can be a Web page or any part of a Web page where customers enter information. For example, your customer may need help for entering information on the following types of forms:

- Registration form
- Shopping cart or order page
- Checkout page

When you or your customer enters information in a form that you are sharing, you both see the information immediately. Thus, you can take turns to enter information. The customer must submit the information when the form is complete.

Avaya IC provides the Collaborative Form Filling for the following HTML elements:

- Text box
- Radio button
- Check box
- Drop-down list

- Text Area

Note:

The HTML elements are supported only if the elements are specified inside the <form> tag.

For information about handling Collaborative Form Filling, see [Using Collaborative Form Filling](#) on page 104.

Email application

The Email application is a component of Avaya Agent Web Client that handles only e-mail work items. Depending on your setup, the Email application might display when you log in to Avaya Agent Web Client or you might need to start the Email application separately.

With the Email application, you can do the following:

- Review and respond to e-mail work items.
- Transfer an e-mail to another agent or a supervisor.
- Obtain information or assistance with the e-mail work item from an external agent.
- View related e-mail work items.

Many of the work handling controls and components in the Work Management Console are also available in the Email application. If you only work on e-mail work items, you can use the Email application to handle all your work items.

Note:

In Avaya Agent Web Client, the list of fonts that is displayed in the Fonts drop-down field when you use email composition, reply, or forward, contains the fonts stored in the \\Windows\\Fonts folder on your machine. Therefore, the fonts do not represent the set of fonts that AAWC supports. You can add fonts to the \\Windows\\Fonts folder to use the fonts in AAWC. The displayed list of fonts depends on the set of fonts present on the agent's Windows machine. If a customer wants to use any font in AAWC, the customer can the font to the font directory and the font will appear in the Fonts drop-down list.

This section discusses the following topics:

- [Email application components](#) on page 41
- [Email work list](#) on page 42
- [Email work item icons](#) on page 44

Email application components

The Email application displays the following components.

Component	Description
Menu bar	Displays the following menus that you use to handle e-mail work items: File , View , Insert , Tools , Actions , and Help .
Work handling toolbar	Displays the Work Handling toolbar buttons that are used for e-mail work items. Select a toolbar button to complete a task while you work with an e-mail work item. Many of the buttons also appear in the Work Management Console and as menu options on the Email application Actions menu. For more information, see Work handling toolbars on page 215.
Email work list	Displays the e-mail work items that are currently assigned to you. Displays columns that are used for e-mail work items. The Type of Email and Emails in progress columns identify the type of e-mail message and whether you are composing an e-mail. Select a work item from the work list to make the work item current. For more information, see Email work list on page 42.
Message Tab-set	Displays tabs where you can read and compose e-mail messages. The Message Tab-set contains a tab for the original e-mail work item and additional tabs for a reply or forward. You can also use the Message Tab-set to handle e-mail alerts and quality assurance functions. For more information, see Replying to the current email work item on page 127. Note: If you do not have a current or alerting work item, or when the e-mail application is in preview mode, the Message Tab-set is empty.

Component	Description
Email Address fields	Displays the e-mail header information for the e-mail, including the following fields: ● From - The address of the person who sent the original work item. ● To - The address of the person who receives the e-mail. ● Cc - The addresses of the people who receive a copy of the e-mail. ● Bcc - The addresses of the people who anonymously receive a copy of the e-mail. ● Subject - The topic of the e-mail that the customer entered. Note: Use semicolon (;) for separating multiple e-mail addresses. However, if there is a semicolon (;) in the display name of an e-mail address, for example "Joy ; Mary" <Joy.Mary@xyz.com>, the e-mail address is separated into two e-mail addresses as: ● "Joy ● Mary" <Joy.Mary@xyz.com>. Therefore both the e-mail addresses are treated invalid. For more information, see Reviewing the current email work item on page 125.
Attachments	Displays the list of attachments that were included with the original e-mail work item, or those that you attached to a composition. Use the Attachments list box to open, save, add, or delete attachments. For more information, see Working with attachments on page 128.
Status Bar	Displays the system and application information for the e-mail work items. Displays the same messages that appear in the Work Management Console status bar. For more information, see Using the status bar on page 80.
Resources pane	Displays the Resources feature in a pane that is attached to the right of the Email application. Use the Resources pane to include prepared sets of text and suggested responses in an e-mail work item. You can apply e-mail templates when composing an e-mail. For more information, see Using resources in an email work item on page 135.

Email work list

The Email application contains an Email work list that you can use to handle your e-mail work items. You can select and activate e-mail work items in the Email work list. The Email work list fields are similar to the fields in your My Work List, but only provide information related to e-mail work items.

Each row in the Email work list relates to a different e-mail work item.

For information on the icons that display in the work list, see [Understanding work item icons](#) on page 27 and [Email work item icons](#) on page 44.

The following table lists the columns that Avaya Agent Web Client displays in the Email work list.

Column	Description
 Current Work Item	Identifies the current work item.
 Work Item Status or Lifecycle	Identifies the status of the work item as one of the following: Alerting , Collaboration , Pause , or Wrap Up . For e-mail, Collaboration identifies an e-mail work item that was transferred from another agent or a supervisor.
Customer	Identifies the following: • Sender's e-mail address or name. • An e-mail alert, such as ALERT: External Agent or ALERT: Request for Information.
 Type of Email	Identifies certain types of e-mail that need to be brought to your attention immediately. Displays an icon that identifies e-mail alerts, responses from external agents, responses from customers to your request for additional information, and quality assurance related work items.
Topic	Displays the subject line of the e-mail work item.
Duration	Identifies the length of time since an e-mail work item arrived in your work lists. This timer runs continuously until you complete the work item.
Paused	Identifies the length of time since you paused the work item. This timer runs continuously until you resume the work item.
 Emails in Progress	Identifies the e-mails that you have started to compose. For example, identifies a draft reply to a customer or a draft outbound e-mail.

Email work item icons

Avaya Agent Web Client displays icons in the work list to identify the status of the work items. The icons are the same images that appear on the Work Handling toolbar buttons you use to complete the action. For example, when you select **Pause**, the application displays a **Pause** icon in the status column for the work item.

The following table lists the additional columns and icons that Avaya Agent Web Client displays in the **Email** work list. To sort the work items, select a column header. For more information, see [Sorting work items in a work list](#) on page 29.

Note:

The **Email** work list also displays additional columns and icons that are common to all work lists. For information about those columns and icons, see [Understanding work item icons](#) on page 27.

Column	Work item icon	Description
 Special Type of Email		Identifies the type of e-mail.
		Identifies the Customer icon. The customer replied to your request for more information.
		Identifies the External Agent icon. The external agent replied to your request for more information.
		Identifies the Email Alert icon. You have not received a response from the customer in the specified time period.
		Identifies the Email Alert icon. You have not received a response from the external agent in the specified time period.
		Identifies the Quality Assurance icon. The e-mail is ready to be reviewed for quality assurance.
		Identifies the Quality Assurance rejection icon. The e-mail did not pass the quality assurance review and must be corrected.

Column	Work item icon	Description
 Sort by: Emails in Progress		Identifies work items that you are composing the contents of the e-mail.
		Identifies the e-mail work items that you are composing the contents of the e-mail.

Resizing the application window

You can make the application window larger than its default size the same way that you resize any browser window. You cannot resize the window smaller than its default width and height. The default width of the application window is the application with the Resources pane collapsed.

You can resize the areas within the window by moving the splitter bars. A splitter bar separates the areas of the window.

This section discusses the following topics:

- [Resizing the width of the window](#) on page 45
- [Resizing the height of the window](#) on page 46

Resizing the width of the window

When you make the window wider than its default width, Avaya Agent Web Client resizes the window proportionately with the Resources pane expanded.

To resize the width of the window:

1. Select the vertical splitter bar that separates the areas.
2. Select and drag the splitter bar up to the right or left to increase the width of the area.

The width of the area next to it changes proportionately.

Resizing the height of the window

To resize the height of the window:

1. Select the horizontal splitter bar that separates the areas.
2. Select and drag the splitter bar up to increase the height of the area.

The height of the area next to it decreases proportionately.

Quick Find

The Quick Find feature consists of:

- The **Toolbar Quick Find**, which provides a quick destination entry field for the following features without opening the Address Book: **Conference**, **Transfer**, **Consult**, and **New Communication**.
- The **To**, **Cc**, and **Bcc** fields in the Address Book. With these fields you can quickly select a destination for a work item.

Note:

A destination is a queue, agent, or device that can work with voice, chat, and e-mail work items.

In the **Toolbar Quick Find** or the **To**, **Cc**, and **Bcc** fields in the Address Book, you can use:

Quick Find most frequent destinations: Whenever you open the drop-down list in the **Toolbar Quick Find**, **To**, **Cc**, or **Bcc** fields, Avaya Agent Web Client displays your most frequently used destinations. You can select one of those destinations with a single mouse click or your keyboard's arrow keys.

Text matching: When you start typing a destination in the **Toolbar Quick Find**, **To**, **Cc**, or **Bcc** fields, Avaya Agent Web Client automatically matches what you type to valid destinations that you have entered into the field before. If any previously used destinations match your current entry, the client displays them in a list as you type. You can use your mouse or your keyboard arrow keys to select one of those destinations.

If no list appears, then no previously used valid destinations match the characters that you have entered.

Note:

Text matching is only available for the first destination entered in the **Cc** or **Bcc** fields. You can add subsequent destinations by selecting them from the Address Book or by entering them manually separating by semicolons.

Text entry: You can enter a destination directly into the **Toolbar Quick Find**, **To**, **Cc**, or **Bcc** fields and select **Enter** to have Avaya Agent Web Client use that destination for the work item.

Visual clues

Avaya Agent Web Client provides the following visual clues to help you handle work items:

Up arrow or down arrow in a column heading: Identifies the sort order. Select a header to sort the information in a list. The up arrow indicates to sort in ascending order (A-Z, 0-9). The down arrow indicates to sort in descending order (Z-A, 9-0).

Ellipsis (...) after a menu option: Indicates that Avaya Agent Web Client displays a window or dialog box for you to complete. For example, **Preferences...** indicates that Avaya Agent Web Client displays the **Agent Preferences** window.

Ellipsis (...) at the end of a string of text or information: Indicates that text is hidden because of limited space. When you position your cursor on the text, a screen tip displays the complete information.

Keyboard operations

You can use the keyboard to perform most tasks in Avaya Agent Web Client. For example, you can press keys to select menu options and to move between such items as buttons, windows, components, and panes.

Note:

Uppercase and lowercase keys work the same.

If you press a wrong key or try to complete an action that is not available, Avaya Agent Web Client displays a message in the status bar.

An outline around a toolbar button or command button, or a highlighted menu option or field indicates that the button, option, or field is selected.

This section discusses the following topics:

- [Keystrokes](#) on page 48
- [Hot keys](#) on page 50

Keystrokes

Avaya Agent Web Client uses many keystrokes that are used in other Web and Windows applications. The notation **Key1+Key2** indicates that you need to press **Key1** and **Key2** simultaneously.

The **Fn** (Function key number) notation identifies the function keys, **F1** through **F12**, which appear on the top row of your keyboard.

This section discusses the following topics:

- [General use of keys](#) on page 48
- [Keys that complete command actions](#) on page 50

General use of keys

The following table lists the keyboard keys that you can use in every window, component, and pane:

Key	Description
Esc	• Cancels the current task. • Closes the current menu or tree node and moves to the previous higher level. For example, pressing Esc closes a drop-down menu and places the cursor on the menu that opened the drop-down menu.
Control+F4 Alt+F4	Selects the Exit option for the current window or Work Management Console.
Tab	Usually moves left to right or top to bottom between controls, drop-down menus, or text fields in the same pane. The system highlights or places a dotted outline on the selected control, menu, or text fields. When used with a text field, Avaya Agent Web Client does not change the current text entry.
Shift+Tab	Moves in reverse order between tabs, drop-down menus, and fields in the same pane.
Alt+Tab	Moves and selects the next higher level tab. For example, if you select a tab you can use Tab to select controls within it, then Alt+Tab to leave the tab and select the next one.
Control+Tab	Moves from the current control group to the next high level control group.
Shift+Control+Tab	Moves and selects in the reverse order than Control+Tab .

Key	Description
Down arrow	Moves to the next object. For example, the next: • Menu option in a menu • Entry in a list box • Character in a field • Node in a tree menu at the same level
Up arrow	Moves to the previous object. For example, the previous: • Menu option in a menu • Entry in a list box • Character in a field • Node in a tree menu at the same level
Right arrow	• Opens the next lower menu for the selected menu option. • Expands the branch in the tree. • Moves to the next entry in a list. • Moves to the next character in a field.
Left arrow	• Moves to the menu option that opened the current menu. • Moves to the previous item in a list. • Moves to the previous character in a field.
Alt+Space	Displays a context menu for the active window in which the menu displays.
Enter	Leaves a selected text box and completes the command that is associated with the default command key, such as OK .
F1	Displays the Avaya Agent Web Client online Help system.
Shift+F1	Displays the Avaya Agent Web Client with the Help topic for the current pane.
F6	In any control outside a TabSet, if your current focus is in tabset, you can use F6 to move out of tabset and back. For example, in Wrapup dialog, F6 moves between tabset and "OK and Help" buttons. Various control groups with tabset available in the Avaya Agent Web Client are: • Address Book • Preferences • Customer Contact Details • Wrapup Dialog

Keys that complete command actions

Use the following keys to complete an action:

To complete this action:	Press the following key:
Close a window or menu	Esc Left arrow Up arrow Enter
Complete the selected command	Enter

Hot keys

You can use hot keys to select and open many top-row menus, such as **File**, **Edit**, **View**, and **Actions**. To open a top-row menu, press the **Alt** key and the hot key that is assigned to the menu.

The hot key letter assigned to each menu is underlined in the menu name. For example, **V** is the hot key for the **View** menu. The **V** in **View** is underlined.

To open the **View** menu, press the **Alt** and **V** keys at the same time. The hot key combination is **Alt+V**. You can press either **V** or **v**.

Note:

Because the **Resources** window is attached to both the Chat and Email application windows, the **Resources** window and the associated **Manage Resources** window have a different set of hot keys than other **View** menus. For example, in both Resources windows, the hot key for the **View** menu is **Alt+W**, not **Alt+V**.

Chapter 4: Managing your work environment

The Agent Status and Control pane displays the **Agent** button. You use the **Agent** menu to manage your status, control your working environment, and exit Avaya Agent Web Client.

This section discusses the following topics:

- [Logging into Avaya Agent Web Client](#) on page 52
- [Logging out of Avaya Agent Web Client](#) on page 55
- [Setting your availability for work](#) on page 56
- [Setting your availability for channels](#) on page 58
- [Setting the delay to make channels available in a sequence](#) on page 59
- [Logging into channels](#) on page 60
- [Logging out of channels](#) on page 61
- [Resetting channels](#) on page 62
- [Setting preferences for your desktop](#) on page 63

Logging into Avaya Agent Web Client

You can log in to Avaya Agent Web Client from your Internet browser.

If you are set up to use **free seating**, Avaya Agent Web Client displays another login window that you use to log in to the voice channel.

During the log in process, you might be asked to change your password.

This section discusses the following topics:

- [System security](#) on page 53
- [Logging in](#) on page 53
- [Logging into the voice channel with free seating](#) on page 54

System security

You have an important responsibility to help keep your system secure. Observe the following rules to ensure the security of the system:

- When you are required to change your password, choose a password that is easy for you to remember but would be impossible for anyone to guess.
- Follow the rules, such as the length of the password and the number and type of characters in the password.
- Ask your supervisor if you need help to create your password.
- Never write down your password.
- Never share your password with anyone.
- Contact your administrator immediately if you suspect any security problems, such as a computer virus, unusually slow response times, or other abnormal behavior of the system.

Logging in



Tip:

Before you log in to Avaya Agent Web Client, disable all pop-up blockers in your Web browser for the log in page. If you turn off pop-up blockers during a session, Avaya Agent Web Client may stop working.

To log in to Avaya Agent Web Client:

1. From the **Start** menu, select **Programs > Internet Explorer**.
2. Type or select the Web page address created for Avaya Agent Web Client.
The **Avaya Agent Web Client Login** window opens.
3. Enter your user ID in the **Login ID** field.
4. Enter your password in the **Password** field.
5. Select **Log In**.

Avaya Agent Web Client displays the **Avaya Agent Web Client Launch Pad** window and opens the **Avaya Agent Web Client** window.

Note:

If you minimize the **Avaya Agent Web Client** window during the initialization, the window might not restore to the original position and size.

6. If you see a security window prompting you to download and install avayaaicagent.cab, select **Yes**.

7. If you are asked to change your password, complete the following steps:
 - a. Enter your current password in the **Old Password** field.
 - b. Enter a new password in the **New Password** field.
 - c. Enter the new password in the **Confirm Password** field.
 - d. Click **OK**.
8. If you are set up to use **free seating**, Avaya Agent Web Client displays another login window to log you in to the voice channel. Continue with step 1 in the topic [Logging into the voice channel with free seating](#) on page 54.

Avaya Agent Web Client logs you in to the channels you can use.

Depending on your setup, your status might be Aux Work, a temporary status where you cannot receive new work.

To receive work items, change your status to Available. For more information, see [Setting your availability for work](#) on page 56.

Logging into the voice channel with free seating

If you are set up to use **free seating**, Avaya Agent Web Client displays another login window that you use to log in to the voice channel.

Free seating allows you to specify which telephone set in your contact center you want to use. When you log in, Avaya Agent Web Client attaches personal settings and preferences to your login ID and password.



CAUTION:

With free seating, log in to one workstation at a time. If you want to change to another telephone set, log out of the first workstation before log in to the next workstation.

To log in to Avaya Agent Web Client with free seating:

1. Enter your agent ID in the **Agent ID** field.
The agent ID logs you in to the telephone switch and sends the voice work items that are assigned to your ID to your telephone.
2. Enter your agent password in the **Agent Password** field.
The agent password confirms your identity to the Automatic Call Distributor (ACD) telephone system.
3. Enter your equipment information in the **Station ID** field.
The station ID identifies the station or equipment number of your telephone.

4. (Optional) Enter your voice channel queue in the **Queue** field.

Avaya Agent Web Client attaches your settings and preferences to your work station ID and queue settings.

5. Select **Log In**.

Avaya Agent Web Client logs you in to the voice channel.

Logging out of Avaya Agent Web Client

Use the **Agent** menu to log out or exit Avaya Agent Web Client.

You can request to exit the application at any time. However, you can only exit after you complete any open work items. If there are other work items in your work list when you select **Exit**, then, depending on your set up, the **Agent** icon changes from Available to Requesting Aux Work.

Note:

During the time that your status is Requesting Aux Work, Avaya Agent Web Client does not deliver new work items. After you complete the work items, Avaya Agent Web Client changes your status to Aux Work and allows you to select **Exit** again to log out. For more information, see [About Aux Work](#) on page 56.

If you cannot log out or experience erratic behavior, contact your administrator and consult the [Troubleshooting](#) on page 212.

To log out of Avaya Agent Web Client:

1. Select the down arrow on the **Agent** button.
2. Select the available exit menu item:
 - If the menu option is **Exit**, select **Yes** in the **Log Out** window to confirm that you want to leave the application.
 - OR
 - If the menu option is **Exit...**, select a reason in the **Exit Reason** window, and then click **OK**.

Setting your availability for work

In Avaya Agent Web Client, the **Agent** button and menu allow you to view and manage your availability to receive work. You can select the **Agent** button or the **Agent** menu options.

You can make yourself available to receive new work items or place yourself in Aux Work to stop receiving work. Your current state of availability to handle work items is called your agent status.

The **Agent** icon indicates your agent status. For an image and description of the agent icons, see the table in [Agent Status and Control](#) on page 214.

This topic discusses how to set your availability to receive work:

- [About Aux Work](#) on page 56
- [Setting your status to Available](#) on page 57
- [Setting your status to Aux Work](#) on page 57

About Aux Work

When you log in to Avaya Agent Web Client, you might be unavailable to receive work. In this case, your agent status is Aux Work. The **Agent** icon changes to Aux Work.

Note:

When your status is Aux Work, you can handle the work items that are in the work list but you cannot receive new work.

If you select **Aux Work** while you have an active or alerting work item in the work list, Avaya Agent Web Client changes your agent status to Requesting Aux Work. When you complete the work items, the button icon changes to Aux Work.

Depending on your setup, Avaya Agent Web Client displays a submenu with reasons for requesting Aux Work. Avaya Agent Web Client displays a check mark next to the reason and changes your status to Aux Work. To select a different reason, select another menu option.

Setting your status to Available

To set your status to Available and receive new work:

- Select **Agent**.
- OR
- Select the **Agent > Available** menu option.

The **Agent** icon changes to Available. Avaya Agent Web Client displays a check mark next to the **Agent > Available** menu option.

Setting your status to Aux Work

To set your status to Aux Work:

1. Use one of the following methods to stop receiving new work:
 - Select **Agent**.

OR

 - Select the **Agent > Aux Work** menu option.

The **Agent** icon changes to Aux Work. Avaya Agent Web Client displays a check mark next to the **Aux Work** option.

2. Depending on your setup, Avaya Agent Web Client displays a submenu with reasons for requesting Aux Work. Select a reason why you want to change your status to Aux Work.

Avaya Agent Web Client displays a check mark next to the reason and changes your status to Aux Work.

3. You can select a different reason by selecting another menu option.

For example, you might want to temporarily stop receiving new work to attend a training session, a meeting, or to eat lunch. After the training session, you might want to eat lunch. Select **Agent > Aux Work > Training**. Later, select **Agent > Aux Work > Lunch**.

Setting your availability for channels

In Avaya Agent Web Client, the **Agent** menu allows you to manage your availability to receive voice, chat, and e-mail work items. When you make yourself available to receive work, you also make yourself available for all your channels.

Depending on your setup, you might be able to change your availability on a channel by channel basis and do the following for each channel:

- Make yourself available for each channel that you are set up to use.
- Change your workload for each channel that you are set up to use. To change your workload settings, use the **Workload** tab in the **Agent Preferences** window. For more information, see [Setting workload preferences](#) on page 65.

If you can change your availability for a channel, the **Agent > Available** option displays a submenu. The submenu displays **All Channels** and each channel you can use. Select **All Channels** to select all the channels at one time, or select individual channels. Avaya Agent Web Client displays a check mark next to the channels that are available.

You can see the status of a channel on the Work Status Summary pane and on the **Agent > Available** submenu. Avaya Agent Web Client changes the icons on the Work Status Summary pane to identify status of the channel. For more information on the channel icons, see [Work Status Summary pane](#) on page 23.

This section discusses the following topics:

- [Making yourself available for a channel](#) on page 58
- [Making yourself unavailable for a channel](#) on page 59

Making yourself available for a channel

To make yourself available for a channel:

1. Select **Agent > Available**.

Avaya Agent Web Client displays a submenu with options for the channels you can use. You can select one or more channel options.

2. Select an option from the **Available** submenu:
 - **All Channels** - Select to change your availability for all channels.
 - **Voice** - Select to change your availability for the voice channel.

- **Chat** - Select to change your availability for the chat channel.
- **Email** - Select to change your availability for the e-mail channel.

Avaya Agent Web Client displays a check mark next to the channel that you make available.

If a check mark does not appear next to the channel, ensure that the maximum workload for the channel is not set to zero. For more information, see [Setting workload preferences](#) on page 65.



CAUTION:

If the channel option is disabled, the channel is currently not operational. Verify that you are not logged out of the channel. Otherwise, contact your administrator.

Making yourself unavailable for a channel

To make yourself unavailable for a channel:

1. Select **Agent > Available**.

Avaya Agent Web Client displays a submenu with options for the channels you can use. You can select one or more channel options.

2. Select an option from the **Available** submenu:

- **All Channels** - Select to change your availability for all channels.
- **Voice** - Select to change your availability for the voice channel.
- **Chat** - Select to change your availability for the chat channel.
- **Email** - Select to change your availability for the e-mail channel.

Avaya Agent Web Client removes the check mark from the channel that you made unavailable.

Setting the delay to make channels available in a sequence

When an agent goes from the Auxwork state to the Available state, the channels are made available based on ADU events. The voice channel becomes available first and after that e-mail and chat channels become available.

All the channels become available in an asynchronous mode. Therefore, the sequence in which the channels become available may change depending on the time required for processing to make each channel available. Due to this, email or chat channel can become available before the voice channel and an agent can get email or chat contact before the voice contact.

The `ChannelThrottleTime` property is added to give enough time for processing to make each channel available in a required sequence, like voice, e-mail, and chat.

In your environment, try setting different values to the `ChannelThrottleTime` property so that channels become properly available in a sequence.

To set the delay in making channels available in a sequence:

1. In IC Manager, on the main menu, click **Tools > Groups**.
2. In the **Group Manager** dialog box:
 - a. In the left pane, click **IC**.
 - b. Click the **Properties** tab.
 - c. In the **Sections** field, click **Agent/Desktop**.
 - d. In the **Settings** pane, select the **ChannelThrottleTime** property.
 - e. On the toolbar, click the **Edit Selected Property** button.
 - f. In the **Edit Property** dialog box:
 - a. Click the **Property Value** field enter the required delay in seconds.
 - b. Click **OK**.
 - g. Click **OK**.

Logging into channels

When you log in to Avaya Agent Web Client, you log in to all the channels for which you are enabled. However, you can log in to and out of individual channels to limit your work items to one or two channels. For example, you might want to log in to the voice channel and log out of the chat and e-mail channels. Then, you can only receive voice work items.

Use the **Log In/Log Out of a Channel** option on the **Agent** menu to log in to and out of channels. When you use voice **free seating**, a window opens and prompts you to log in to the voice channel. For more information, see [Logging into the voice channel with free seating](#) on page 54.

Note:

You must be logged into a channel before you make yourself available to work on a channel.

To log in to the channels:

1. Select the **Agent > Log In/Log Out of a Channel**.
2. Select one or both of the enabled channel menu options:
 - **Log In to Voice**
 - **Log In to Chat and Email**
3. If you are set up to use free seating and you chose **Log In to Voice**, complete the following fields:
 - **Agent ID**
 - **Agent Password**
 - **Station ID**
 - **Queue**.

Logging out of channels

When you log in to Avaya Agent Web Client, you log in to all the channels for which you are enabled. However, you can log in to and out of individual channels to limit your work items to one or two channels. For example, you might want to log in to the voice channel and log out of the chat and e-mail channels. Then, you can only receive voice work items.

Use the **Log In/Log Out of a Channel** option on the **Agent** menu to log in to and out of channels.

Your contact center might want you to assign a reason code when you log out of a channel or Avaya Agent Web Client.



Tip:

Avaya Agent Web Client displays an ellipsis (...) to identify channels that require a logout reason.

To log out of channels:

1. Select the **Agent > Log In/Out of a Channel**.
2. Select the log out option for the channel that you no longer want to use.

If you are set up to assign a reason code, Avaya Agent Web Client displays the **Channel Log Out** window.
3. Select a reason code from the list.

**Tip:**

You can use your mouse or enter a letter or number in the reason code name to move the cursor to the first match. Use the arrow keys to move to the reason code and press **Enter**.

4. Click **OK**.

Avaya Agent Web Client logs you out of the channel.

Resetting channels

**WARNING:**

Only reset a channel when your administrator tells you to select the **Reset a Channel** option. When you reset a channel, you lose each work item in the work list for that channel.

Sometimes a channel might need to be reset to resolve synchronization issues or to clear other issues with the channel. Avaya Agent Web Client provides a reset option on the **Agent** menu. When you log in to the channel, Avaya Agent Web Client enables the **Reset a Channel** option for each channel that you are setup to use.

When you reset the voice channel, Avaya Agent Web Client:

- Clears all existing work items for a channel
- Resets your connection to the voice channel without logging you out of the channel

When you reset the chat and e-mail channels, Avaya Agent Web Client:

- Clears all existing work items for a channel
- Logs you out of the channel
- Logs you in to the channel

To reset a channel:

1. Select the **Agent > Reset a Channel**.
2. Select the reset option for the channel.

Avaya Agent Web Client displays a warning message that each work item for the channel will be lost.

3. Click **OK**.

Avaya Agent Web Client displays a status bar message when the channel reset is complete.

Setting preferences for your desktop

Use the **Agent Preferences** tabs to set application preferences that are associated with window behavior, general work handling, and security options.

To set or review your preferences:

1. Select the **Agent > Agent Preferences**.
2. Select one of the tabs in the following table:

Tab	Description
General	Sets preferences that are associated with window behavior, general work handling, and security options. For more information, see Setting general preferences on page 63.
Workload	Sets or displays the maximum number of work items you can receive at one time for each channel. For more information, see Setting workload preferences on page 65.
Chat	Sets preferences for handling chat work items. For more information, see Setting chat preferences on page 66.
Email	Sets preferences for handling e-mail work items. For more information, see Setting e-mail preferences on page 67.
Spelling	Sets the spell checking preferences for chat and e-mail work items, your Custom Dictionary, and your messages. For more information, see Setting spelling preferences on page 67.

3. Select a preference.
4. When you complete setting preferences for all tabs, click **OK**.

Avaya Agent Web Client applies the settings for each tab.

Setting general preferences

Use the **General** tab to set preferences that are associated with the window behavior, general work handling, and security options.

You can change the following general preferences:

- [Displaying the Avaya Agent Web Client window](#) on page 64
- [Confirming the release of work items](#) on page 64

- [Changing your Avaya Agent Web Client password](#) on page 64

Displaying the Avaya Agent Web Client window

To display the Avaya Agent Web Client on top of other windows, select the field in the **Avaya Agent Web Client window** area.



Important:

If you select to display the Avaya Agent Web Client window on top of all other windows, you may not be able to see the **File Download** window that is displayed when you open and send e-mail attachments. You might need to adjust the locations of windows that open while using Avaya Agent Web Client.

Confirming the release of work items

To verify whether you want to confirm each work item you release, select the field in the **Confirm** area.

Changing your Avaya Agent Web Client password

Depending on your setup, you can modify your current agent password.

To change your password:

1. Select **Change Password**.

Avaya Agent Web Client displays the **Change Avaya Agent Web Client Password** window.

2. Enter your current password in the **Old Password** field.
3. Enter a new password in the **New Password** field.
4. Enter the new password in the **Confirm Password** field.
5. Click **OK**.

Related topics

[System security](#) on page 53

[Logging into Avaya Agent Web Client](#) on page 52

Setting workload preferences

Use the **Workload** tab to change or view the maximum number of work items you can receive at one time for each channel. Depending upon your setup, you may be allowed to change your workload settings.

This section discusses the following topics:

- [Setting your maximum workload](#) on page 65
- [Manually changing your workload](#) on page 65
- [Restoring your workload](#) on page 66

Setting your maximum workload

Avaya Agent Web Client displays the maximum number of work items for each channel that can be delivered to you at one time. When the field is gray with black text, it is disabled.

Avaya Agent Web Client automatically sends you the maximum number that is set for you.

Manually changing your workload

When the field for a channel is enabled, you can change the maximum number of work items that you can receive at one time. The default number of work items is the maximum number setup for you by your supervisor.

To change your workload:

1. In the **Workload** tab of the **Agent Preferences** window, select a number up to the maximum number that is set up for you.
2. Click **OK**.

Avaya Agent Web Client uses the workload settings whenever you log in.

Restoring your workload

If you have manually changed your workload, you can restore your workload to the default.



Important:

If your agent status is Available when you select **Reset Workload**, Avaya Agent Web Client makes you available on all channels. If you were unavailable on some channels before you restored your workload, you must set yourself unavailable again. For more information, see [Setting your availability for channels](#) on page 58.

To restore your workload:

1. In the **Workload** tab of the **Agent Preferences** window, select **Reset Workload**.
2. Click **OK**.

Setting chat preferences

Use the **Chat** tab to set up how Avaya Agent Web Client handles a resource item from the **Resource** pane in the Chat application.

Select this tab to automatically add text or Web page address from a resource. When you select this option, you can double-click a resource to send it directly to the customer. For more information, see [Managing chat work items](#) on page 96.

To send the text of a resource or a Web page address directly to the customer:

1. Select the **Chat** tab in the **Agent Preferences** window.
2. To send a resource directly from the Resources pane in the Chat application, select **Double-click the resource to send it** in the **Send Resources** area.
3. To send a text message directly without pressing **Send**, select **Press the Enter key to send the text message** in the **Send Text Message On Enter** area. This option allows you to enter a text message and press **Enter** on your keyboard, rather than selecting **Send**.
4. After you set all preferences, click **OK**.

Avaya Agent Web Client applies the settings for each tab.

Setting e-mail preferences

Use the **Email** tab to set up how Avaya Agent Web Client handles e-mail work items in the Email application. For more information about the Email application, see [Managing email work items](#) on page 122.



Tip:

Avaya recommends that you select **Read incoming e-mails in HTML format** as your default preference. This preference automatically sets the display of HTML e-mails in HTML format and plain text e-mails in plain text format. If you do not select this preference, you will only see the plain text part of HTML e-mails.

To select how to handle e-mail work items:

1. Select the **Email** tab in the **Agent Preferences** window.
2. Select a preference in the **Text** area:
 - To check the spelling of original text quoted in an e-mail, select **Check the spelling of the original text when checking the spelling of your work**.
 - To automatically continue text to the next line, select **Continue long e-mail text on the next line**.
 - To set your default format of inbound e-mails to HTML, select **Read incoming e-mails in HTML format**.

Avaya Agent Web Client may override this preference. For example, if the content of an incoming e-mail is in HTML only and does not include any plain text elements, Avaya Agent Web Client will display that e-mail in HTML format. If the content of an incoming e-mail is in plain text, Avaya Agent Web Client will display that e-mail in plain text.
 - To set your default format for new outbound e-mails to HTML, select **Set default mode of composition to HTML**.
3. To have Avaya Agent Web Client prompt you to confirm that you want to send the e-mail, select **Before sending e-mails** in the **Confirm** area.
4. After you set all preferences, click **OK**.

Avaya Agent Web Client applies the settings for each tab.

Setting spelling preferences

Use the **Spelling** tab to set the spell checking preferences used to check the spelling of chat and e-mail work items.

This section discusses the following topics:

- [Selecting how to check your spelling](#) on page 68
- [Editing your custom dictionary](#) on page 68
- [Specifying an international dictionary](#) on page 69

After you set preferences for all tabs, click **OK**. Avaya Agent Web Client applies the settings for each tab.

Selecting how to check your spelling

In the **Select how to check your spelling** area, you can set up Spelling to do the following:

- Suggest corrections
- Ignore how words appear
- Ignore Internet and file addresses
- Ignore the original e-mail message

To set up the spelling error check:

1. Select the **Spelling** tab in the **Agent Preferences** window.
2. Select each option that you want to use when Spelling checks for spelling errors.
3. To no longer use an option, clear the field.



Tip:

If you do not select the check box for **Always suggest corrections for misspelled words**, you can manually request a suggested spelling. In the Spelling window, when Avaya Agent Web Client highlights a word, select **Suggest**.

Editing your custom dictionary

In the **Edit the Custom Dictionary** area, you can add or remove words in your custom dictionary.

To edit the custom dictionary:

1. Click **Edit** on the **Spelling** tab.
The **Custom Dictionary** window opens.
2. To add a word:
 - a. Enter a word in the **Edit the Custom Dictionary** field.
 - b. Click **Add**.
3. To remove a word:

- a. Select the word in the **Dictionary** list:

You can remove one or more words at the same time.

- To select consecutive words, press **Shift** and select the first and last words.
- To select words that are not next to each other, press **Control** and select each word individually.

- b. Click **Remove**.

4. Click **OK** to close the window.

Specifying an international dictionary

Spelling supports English and European languages. Spelling does not support Asian languages.

In the **International dictionaries** area, you can specify a language dictionary that Avaya Agent Web Client uses while checking the spelling of your messages.

To specify an international dictionary:

- Select a language from the **Language** field.

Chapter 5: Viewing customer and work item information

Use the Details Tab-set to review information about a work item. You can review information about a work item at any time.

This section discusses the following topics:

- [Details Tab-set](#) on page 70
- [Reviewing customer details](#) on page 71
- [Reviewing a list of customer contacts](#) on page 74
- [Customer Contacts Details window](#) on page 76
- [Reviewing the work item history](#) on page 79

Details Tab-set

Avaya Agent Web Client displays information about the selected or current work items that are in your work list. The Details Tab-set is located in the right side of the Work Management Console. Use the Details Tab-set to review more information about the work item.

The Details Tab-set pane displays three tabs: **Details**, **Customer Contacts**, and **Work History**. Each tab displays information related to the selected or current work item. You can only view the information in the tab-set.

- The **Details** tab displays information about the customer and the work item.
- The **Customer Contacts** tab displays a list of all the contacts that the customer has had with the contact center up to this point. The summary list includes completed contacts and active e-mail work items that are assigned to another agent or waiting to be assigned to an agent.
- The **Work History** tab displays a chronological history of the selected work item. The tab displays routing information for voice and chat work items and detailed tracking information for e-mail work items.

In the **Details** Tab-set, you can copy field information from a tab and paste the information in a chat session, e-mail composition, or third-party application.

You can use your mouse or keyboard to move within the Details Tab-set. For more information, see [Keyboard operations](#) on page 47.

Reviewing customer details

The **Details** tab, which is the default tab, displays information about the selected or current work item in a work list. The information that displays depends on the type of work item that you have selected.

On the **Details** tab, you can do the following:

- Review information about a selected or current work item.
- Copy and paste information into a resource, chat session, or an e-mail composition.

You can view the additional information about the selected work item on the other tabs in the Tab-set.

The **Details** tab displays data fields that pertain to the type of work item. The fields displayed are changed when you select voice, chat, and e-mail work items.

This section discusses the following topics:

- [Reviewing details about a work item](#) on page 71
- [Details for voice work items](#) on page 72
- [Details for chat work items](#) on page 72
- [Details for e-mail work items](#) on page 73

Reviewing details about a work item

To review details about a work item

1. Select the work item in My Work List.
Avaya Agent Web Client displays the information on the currently selected tab of the Details Tab-set.
2. Select another tab in the Details Tab-set to view additional information about the selected work item.

Note:

Avaya Agent Web Client remembers the last tab you selected for a work item.

Details for voice work items

The **Details** tab displays data fields for the selected or current work item.

Note:

You might see different fields than those listed in the following table. If you have any queries about the fields, contact your supervisor.

The following table lists the data fields for voice work items:

Field	Description
Customer	The name of the customer
ANI	The telephone number from which the customer has called
DNIS	The telephone number that the customer dialed
Received	The date and time when the telephone call arrived in your work list
Age	The total length of time that the contact is in the system
Queue Time	The total length of time that the work item waited in the queue before the work item arrived in your work list
Comment	The comment that was entered in the Address Book about the work item.

Details for chat work items

The **Details** tab displays data fields for the selected or current work item.

Note:

You might see different fields than those listed in the following table. If you have any queries about the fields, contact your supervisor.

The following table lists the data fields for chat work items:

Field	Description
Customer	The name of the customer
Received	The date and time when the chat work item arrived in your work list
Age	The total length of time that the work item is in the system
Handle	The Web page address that the customer used to start the chat session

Field	Description
Topic	The initial question for the chat session
Comment	The comment that was entered in the Address Book about the work item

Details for e-mail work items

The **Details** tab displays data fields for the selected or current work item.

To see additional information about the work item, select another tab.

Note:

You might see different fields than those listed in the following table. If you have a question about the fields, contact your supervisor.

The following table lists the information fields for e-mail work items:

Field	Description
Customer	The email address of the customer.
Received	The date and time when the e-mail arrived in your work list.
Sent on	The time when the customer sends the email to an agent.
Age	The total length of time that the work item is in the system.
Type	Displays a description for the type of e-mail: • New e-mail from customer • Reply from customer • Reply from customer with requested information • Reply from external agent • Reply from customer to automatic acknowledgement • Reply from customer to automatic response • Reply to new outbound e-mail • Reply to forwarded e-mail • Quality Assurance needed • Quality Assurance rejection • System generated e-mail alert • System bounced message
To	The e-mail address of the person receiving the e-mail.
From	The e-mail address of the person sending the e-mail.

Field	Description
Topic	The information in the subject of the e-mail that was received
Body	A read only view of the e-mail text that was received
Comment	The comment that was entered in the Address Book about the work item

Reviewing a list of customer contacts

On the **Customer Contacts** tab, you can review a list of the recent contacts that the customer has had with the contact center.

The summary list includes completed contacts and active e-mail work items that are assigned to another agent or waiting to be assigned to an agent.

- For each contact, you can view detailed information about the selected contact in the **Customer Contacts Details** window.
- For each e-mail contact, you can use the **Email Tracking History** window to view detailed information for all e-mails that share a given e-mail tracking ID.

This section discusses the following topics:

- [Viewing summary information](#) on page 74
- [Changing the number of displayed contacts in the summary list](#) on page 75
- [Reviewing detailed information](#) on page 75

Viewing summary information

To view summary information, use the summary list on the **Customer Contacts** tab.

The summary list displays three columns: **Date**, **Type**, and **Topic**.

- **Date** - Displays the date and time when the work item was created.
- **Type** - Displays the type of work item and the contact's current status.
- **Topic** - Displays the subject line of the chat or e-mail that was received.

Changing the number of displayed contacts in the summary list



Important:

Selecting a filter that retrieves and displays many contacts can affect the performance of the application. The maximum number of contacts that can be retrieved depends on your setup.

To change the number of contacts displayed in the summary list

1. Select **Filter**.

Avaya Agent Web Client uses the filter option you select for only the current summary list. When you view another summary list, Avaya Agent Web Client uses the default filter criteria. Depending on your setup, the default criteria might not be **Last 5 contacts**.

2. Select one of the following filter options:

- **Last 5 contacts**, the default filter
- **Last 10 contacts**
- **Today**
- **Yesterday**
- **Last 7 Days**
- **This Week**
- **Last Week**
- **This Month**
- **All Dates**

Reviewing detailed information

Avaya Agent Web Client displays a window with details about work items for the customer or the current work item.

In the **Customer Contact Details** window, you can view a list of all the contacts that the customer has had with the contact center up to this point. The summary list includes completed contacts and active e-mail work items that are assigned to another agent or waiting to be assigned to an agent.

In the **Email Tracking History window**, you can view information about all e-mail work items and e-mail handling that share the same e-mail tracking ID.

To review detailed contact information

1. Select a work item to make it the current work item.
2. Click the **Customer Contacts** tab.
3. Select a contact in the summary list.
4. Double-click the selected contact to open the **Customer Contacts Details** window.
5. Right-click the contact and select **Tracking History** from the context menu.

Customer Contacts Details window

Use the **Customer Contacts Details** window to view a list of all the contacts that the customer has had with the contact center up to this point. The summary list includes completed contacts and active e-mail work items that are assigned to another agent or waiting to be assigned to an agent.

You can have two **Customer Contacts Details** windows open at the same time. One window is for a current work item. The other window is for finding an e-mail.

This section discusses the following topics:

- [Displaying the Customer Contacts Details window](#) on page 76
- [Using the Customer Contacts Details window](#) on page 77

Displaying the Customer Contacts Details window

You can use the **Customer Contacts Details** window for the current work item. If you change the current work item, Avaya Agent Web Client hides the window.

For example, if you are viewing contact details about the current e-mail work item and you changed the current work item to a chat work item, Avaya Agent Web Client hides the **Customer Contacts Details** window for the e-mail work item.

Depending on your setup, when you make the previous work item the current work item again, Avaya Agent Web Client restores the information in the window.

This section discusses the following topics:

- [Work Management Console](#) on page 77
- [Customer Contacts tab](#) on page 77
- [Chat or Email application](#) on page 77

Work Management Console

You can open the **Customer Contacts Details** window by clicking the **Customer Contacts** button on the Work Handling toolbar.

Customer Contacts tab

You can open the **Customer Contacts Details** from the summary list on the **Customer Contacts** tab, by selecting a contact and double-click the contact or right-clicking a contact and selecting **Customer Contacts Details**.

Chat or Email application

You can open the **Customer Contacts Details** window from the Chat or Email application, by clicking the **Customer Contacts** on the toolbar or by selecting **Tools > Customer Contact Details**.

Using the Customer Contacts Details window

The **Customer Contacts Details** window displays all the contacts that the customer has had with the contact center up to this point. The summary list includes completed contacts and active e-mail work items that are assigned to another agent or waiting to be assigned to an agent.

The following table lists the components in the **Customer Contacts Details** window:

Component	Item	Description
Toolbar		Sets a filter for the summary list in the Customer Contacts Details window. Displays a list of criteria you can use to change the number of contacts in the summary list.
		Displays the Email Tracking History window. The window displays information about all e-mails and work items that share a tracking ID with the e-mail work item. For more information, see Email Tracking History window on page 154.
		Displays the Help topic for the Customer Contacts Details window.

Component	Item	Description
Summary list		Displays the summary list from the Customer Contacts tab, including the Date , Type , and Topic columns.
Tab-set	Details	For all work items, displays the appropriate Details tab fields for the selected contact. For more information on specific fields, see: • Details for voice work items on page 72 • Details for chat work items on page 72 • Details for e-mail work items on page 73
	Work History	The Work History tab displays a chronological history of the selected work item. The tab displays routing information for voice and chat work items and detailed tracking information for e-mail work items.
	Wrap Up Details	For all work items, displays wrap up information in the lower portion of the window's Work History tab, including the following: • Agent • Category • Reason • Outcome For more information about the Work History tab and Wrap Up Selections window, see: • Reviewing the work item history on page 79 • Wrap Up Selections window on page 206.
	Chat	For chat items, displays the transcript of the chat session.
	Original	Displays the original e-mail.

Reviewing the work item history

On the **Work History** tab, you can view the history of the selected work item in the chronological order. The tab displays routing information for voice and chat work items and detailed tracking information for e-mail work items.

The following table lists the work history columns for voice and chat work items:

Column	Description
Date	The date and time that the routing segment began for voice and chat work items.
Location	The location where the routing segment was located, such as a queue name or agent.
Exit	The Exit reason that the contact left this segment. For example: normal, abandon, and transfer. If any agent has entered a comment for this work item in the Address Book , appends the most recent comment made to the work item.

The following table lists the work history columns for e-mail work items:

Column	Description
Date	The date and time that the e-mail processing began.
Description	A description of the e-mail similar to the description in the Email Tracking History summary list.
Duration	The length of time since the e-mail work item was created. This timer runs continuously until the work item is completed.

Chapter 6: Using the status bar

Avaya Agent Web Client displays system and application information on a status bar and in a window.

The Status Bar feature consists of a status bar and the **Status Bar Details** window.

The status bar is located at the bottom of the Work Management Console, **Chat**, **Email**, and **Address Book** windows. The status bar in each window displays the same system and application information.

The status bar provides one location where you can:

- Identify the application server connection
- Read status messages
- Identify the message importance
- Access a history of error and warning messages for your current session



Tip:

If the status message text is longer than the status bar display, Avaya Agent Web Client adds an ellipsis (...) at the end of the visible text. To view the message text, place your cursor in the status bar.

The **Status Bar Details** window lists a history of messages for your current session and might display additional information for a selected message.

This section discusses the following topics:

- [Understanding status bar icons](#) on page 80
- [Reviewing the details of status bar messages](#) on page 81
- [Saving status bar details to a file](#) on page 82

Understanding status bar icons

The Avaya Agent Web Client status bar can display two icons to the left of system and application information. The icon on the left identifies whether the browser client and application server are communicating. The icon on the right identifies the type of message that displays in the status bar: informational, warning, and error.

The application server icons are always visible. Message type icons are visible when there is a message.

The following table lists the icons that appear on the status bar:

Icon type	Icon	Description
Network connection	 Connected	You are connected to the application server.
	 Disconnected	You are disconnected from the application server.
	 Disconnected but May Reconnect	You are disconnected from the application server but might be reconnected. Your application will be temporarily disabled.
Message type	 Status Information	Provides additional information on system related actions and processes.
	 Warning	Provides a message that warns you about possible results of an action. To read more information, double-click the icon or text to open the Status Bar Details window.
	 Error	Provides a message when an error occurs. To read more information, double-click the icon or text to open the Status Bar Details window.

Reviewing the details of status bar messages

The **Status Bar Details** window provides more information about status bar messages.

Depending on your setup, you might see details about the messages that occur during your current login session. Avaya Agent Web Client saves the messages during your current login session.



Tip:

Depending on your setup, the number of messages displayed in this window might be restricted by your administrator. To see all the messages from a particular session, save the messages to a file as described below.

The **Status Bar Details** window consists of the following areas:

- **Errors and Warnings** area - Displays an icon showing the type of message, the message itself, and the date and time that the message appeared in the status bar.
- **Details** area - Contains more information about the selected message. Depending on the message, the text might include troubleshooting information.
- **Comment** field - Provides a place where you can enter text.

Avaya Agent Web Client lists the messages in descending order with the most recent message first.

To read status bar messages

1. Double-click the status bar icon or message text.
Avaya Agent Web Client displays the **Status Bar Details** window.
2. Select a message in the messages area.
Avaya Agent Web Client displays the details below the message.

Saving status bar details to a file



Tip:

If you save all status messages, Avaya Agent Web Client does not allow you to accept another call until the save is complete. Place yourself into Auxwork before you save status messages.

To save the status bar details to a file:

1. (Optional) In the **Comment** field, enter a description for the current session. For example, Status messages and details for January 25, 2005.
2. Click **Save All**.

Avaya Agent Web Client saves your comment and messages in a separate log file that includes your user name. If this log file already exists, the Avaya Agent Web Client appends all the messages from your current session to this file. Therefore, if you select **Save All** multiple times during a session, you might see the same messages in the log file several times.

You can find the log file in the following location on the application server:

AVAYA_IC_HOME\logs\UserMessages_username.log. Contact your administrator if you need a copy of the message log you saved.

Chapter 7: Managing voice work items

Avaya Agent Web Client displays telephone calls as voice work items in My Work List. You are ready to use the Work Management Console panes to manage voice work items.

This section discusses the following topics:

- [Handling voice work items](#) on page 84
- [Involving others in a telephone call](#) on page 87
- [Using the Touchtone Keypad](#) on page 90
- [Handling simultaneous voice work items](#) on page 92
- [Creating an outbound telephone call](#) on page 93
- [Releasing a voice work item](#) on page 94

Handling voice work items

In Avaya Agent Web Client, you can receive incoming voice work items and create outgoing voice work items using the Work Management Console panes.

Avaya Agent Web Client notifies you when a new voice work item arrives. Depending on your setup, Avaya Agent Web Client delivers and accepts voice work items for you, or you accept the voice work item manually. For more information, see [Receiving a voice work item](#) on page 85.

As you handle a voice work item, you use the following panes on the Work Management Console:

- My Work List to select new work and to review general work item information. For more information, see [My Work List](#) on page 25.
- Details Tab-set to review information about each voice work item, the work associated with the customer, and historical information about the work item. For more information, see [Details Tab-set](#) on page 70.
- Work Handling toolbar to manage voice work items. For example, you can use toolbar buttons to accept a voice work item, to create a conference, to complete a work item, and to add wrap up information. For more information, see [Work Handling toolbar](#) on page 216.

This section discusses the following topics:

- [Guidelines for voice work items](#) on page 85
- [Receiving a voice work item](#) on page 85

- [Accepting an alerting voice work item](#) on page 85
- [Making a voice work item the current work item](#) on page 86
- [Using resources in a voice work item](#) on page 86
- [Placing a voice work item on hold](#) on page 87

Guidelines for voice work items

You can do the following when handling voice work items:

- Switch between voice, chat, and e-mail work items.
- Depending on your setup, you can talk with the customer while you work on a chat or an e-mail work item. The voice work item is in voice trailing. When you release and complete the chat or e-mail work item, the voice work item becomes the current work item again.
- Depending on your setup, you can use the **Touchtone Keypad** instead of your telephone keypad to send DTMF signals to a selected device, such as an interactive voice response (IVR) unit.

Receiving a voice work item

Avaya Agent Web Client notifies you that a new work item arrived in one of three ways.

- A window opens to notify you of a new work item and asks if you want to work on it now. You can set whether you want Avaya Agent Web Client to notify you this way. For more information, see [Setting general preferences](#) on page 63.
- A new work item arrives in the work list with an **Alerting** icon. You must accept the work item manually.
- A new work item arrives in the work list and Avaya Agent Web Client accepts the work item automatically. The work item is in bold format.

Depending on your setup, you can receive a new telephone call as soon as you become available or release your current voice work item. For more information, see [Setting your availability for work](#) on page 56.

Accepting an alerting voice work item

Depending on your setup, new voice work items can arrive in My Work List in an alerting state with an alerting icon.

You can accept an alerting voice work item by double-clicking the voice work item you want to accept or by selecting the work item in the work list and clicking the alerting **Accept** button on the Work Handling toolbar.

Making a voice work item the current work item

The current work item is the piece of work that you are actively handling and against which you are accumulating work time. You can have one work item that is current and another work item that is selected or highlighted. The selected work item is inactive and in preview mode.

To make the work item in a work list the current work item

1. Select a work item in the work list.

The work item displays information about the customer in the Details Tab-set. The information is in the preview mode. For more information, see [Details Tab-set](#) on page 70.

2. Depending on how you received the selected work item, you can double-click the selected work item or right-click the work item and select **Accept** or **Resume**. For alerting voice work items, you can click **Accept** on the Work Handling toolbar and for inactive voice work items, you can click **Resume** on the Work Handling toolbar.

Note:

Depending on your setup, you can talk with the customer while you work on a chat or an e-mail work item. The voice work item displays a **Voice Trailing** icon in the **Current** column of the work list when you make another work item current. When you release and complete the chat or e-mail work item, the voice work item becomes the current work item again.

Using resources in a voice work item

You can refer to the following types of resources from the **My Resources** and **Global Resources** folders while working on a voice work item:

- Text resources
- Web page resources
- Email resources

For example, you can give the customer an answer to a frequently asked question from a text resource, or a Web page address from a Web page resource.

To see a resource

1. On **Agent Tools**, select **Agent Tools > Manage Resources**.
2. In the Resources tree, double-click a folder and select a resource.

3. Depending on your setup, Avaya Agent Web Client displays the contents of the resource in the Description pane. For more information, see [Viewing resources](#) on page 180.

Related topics

[Types and examples of resources](#) on page 175

[Creating resources](#) on page 183

[Finding a resource](#) on page 189

Placing a voice work item on hold

During your conversation, you might have to place a telephone call on hold while you do work related to the work item. For example, you might need to conduct research, conference the customer with another party, or consult with another agent.

To place a voice work item on hold

1. Select the voice work item in My Work List.
2. Click **Pause** on the Work Handling toolbar.

You can click **Pause** again to resume the telephone call again.

Involving others in a telephone call

During your conversation, you might have to collaborate with another person or resource.

This section includes the following topics:

- [Establishing a conference for a telephone call](#) on page 87
- [Transferring a voice work item](#) on page 88
- [Consulting about a telephone call](#) on page 89

Establishing a conference for a telephone call



Tip:

You can only conference the current work item.

To establish a conference for a telephone call

1. Explain to the customer that the telephone call will be on hold until you establish the connection.

2. (Optional) In the **Toolbar Quick Find**, select or enter a destination. For more information, see [Using Toolbar Quick Find](#) on page 169.
3. Click **Conference** from the work handling toolbar.
If the **Toolbar Quick Find** has a destination, continue with step 5.
4. If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the **Address Book** window. Select or enter a destination in the **To** field.
5. The other agent accepts the conferenced work item. Talk to the conferenced agent while the customer is on hold for your voice work item. Neither the conferenced agent nor the customer can hear each other.
6. You can do the following during the conference:
 - Depending on your setup, you can use **Move Conversation** to alternate talking with the agent and customer. You can select **Move Conversation** as many times as needed. Then, select **Complete** or **Cancel** to conclude the conference.

Note:

Before you can complete the operation, you must be connected to the conferenced agent. If you are not connected, the conference fails.

- Click **Cancel** to end the conference. The system drops the conferenced agent. You return to talking with the customer.
- Click the blinking **Conference** button to complete the conference and bring the customer into the conversation.

Transferring a voice work item

**Tip:**

You can only transfer the current voice work item.

To transfer a voice work item

1. Explain to the customer that you will transfer the telephone call to another person.
2. (Optional) In the **Toolbar Quick Find**, select or enter a destination. For more information, see [Using Toolbar Quick Find](#) on page 169.
3. Click **Transfer** from the work handling toolbar.
If the **Toolbar Quick Find** has a destination, continue with step 5.
4. If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the **Address Book** window. Select or enter a destination in the **To** field.

5. Avaya Agent Web Client transfers the customer telephone call to the selected destination. The voice work item might wait in a queue until the agent is available to answer the telephone call.

Avaya Agent Web Client presents the work information when the agent accepts the work item. The information includes the text entered in the **Comment** field in the **Address Book** window.

Consulting about a telephone call

Use **Consult** to talk with another person before optionally transferring the telephone call. You can consult about voice work items.

If the **Toolbar Quick Find** is empty when you click **Consult**, Avaya Agent Web Client displays the **Address Book** window.



Tip:

You can only consult for the current voice work item.

To consult about a telephone call

1. Explain to the customer that the telephone call will be on hold while you place a telephone call to another person for more information.
2. (Optional) In the **Toolbar Quick Find**, select or enter a destination. For more information, see [Using Toolbar Quick Find](#) on page 169.
3. Click **Consult** on the Work Handling toolbar.

If the **Toolbar Quick Find** has a destination, continue with step 5.

4. If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the **Address Book** window. Select or enter a destination in the **To** field.

The voice customer is on hold while Avaya Agent Web Client establishes the consultation with the other agent.

The first part of the consult process is complete. The other agent accepts the consulted work item. Talk to the consulted agent while the customer is on hold for your voice work item. Neither the consulted agent nor the customer can hear each other.

5. You can do the following during the consult:
 - Depending on your setup, you can use **Move Conversation** to alternate talking with the consulted agent and customer. You can select **Move Conversation** as many times as needed.

Note:

Before you can complete the operation, you must be connected to the consulted agent. If you are not connected, the consult fails.

- Click **Cancel** to end the consult. The system drops the consulted agent. You return to talking with the customer.
- Click the blinking **Consult** button to complete the consult and bring the customer into the conversation.

Using the Touchtone Keypad

If your setup supports DTMF (dual tone multi-frequency) signals, Avaya Agent Web Client enables the **Touchtone Keypad** when you receive a telephone call in My Work List. The **Touchtone Keypad** looks and works like a telephone keypad. You can use your mouse or keyboard to select a character from **0** through **9**, **A** through **Z**, asterisk (*), and pound (#).

Use the keypad to enter an extension number, respond to a voice prompt, or enter an account number.

This section discusses the following topics:

- [When to use the keypad](#) on page 90
- [Sending characters one at a time](#) on page 91
- [Sending a group of characters at one time](#) on page 91
- [Touchtone Keypad shortcut keys](#) on page 92

When to use the keypad

You can use the Avaya Agent Web Client keypad with a voice work item to send a DTMF signal for one of the following:

- Extension number
- Identification number
- Response to a voice prompt
- Account number

Avaya Agent Web Client enables the **Touchtone Keypad** when you receive a telephone call.

Note:

To dial a telephone number, use the **Address Book** or the **New Communication** feature.

Sending characters one at a time

Use the keypad buttons to send one character at a time.

To send characters one at a time

1. If necessary, select a voice work item from My Work List and click **Resume** to make it the current work item.
2. Click **Touchtone Keypad** on the Work Handling toolbar.
3. Click a numbered button on the keypad. Avaya Agent Web Client disables **Send** for the **Enter numerical values** field.

Note:

Depending on your setup, the keypad buttons might display the corresponding alphabetic characters.

Sending a group of characters at one time

Use the **Keyboard** entry field to enter a group of characters.

To send a group of characters at one time:

1. If necessary, select a voice work item from My Work List and click **Resume** to make it the current work item.
2. Click **Touchtone Keypad** on the Work Handling toolbar.
3. Select the **Enter numerical values** field.

Avaya Agent Web Client enables **Send**.

4. Use your keyboard to enter a letter, number, or symbol:
 - To enter an alphabetic character, press an uppercase or lowercase letter key. For example, Avaya Agent Web Client recognizes **b** and **B** as the same character.
 - To enter a numeric character, press a number key on the numeric row or on the numeric keypad.
 - To enter a symbol, press the appropriate key on your keyboard.
5. You can edit the string of characters with the **arrow**, **Delete**, and **Backspace** keys. For general keyboard operations, see [General use of keys](#) on page 48.
6. Click **Send** or press **Enter** to transmit the group of characters at one time.

Avaya Agent Web Client clears the characters from the **Keyboard Entry** field and displays status messages in the status bar pane.

Note:

You must close the **Touchtone Keypad** window before you select another work item or display another window.

7. Click **Close**.

Touchtone Keypad shortcut keys

Use the numeric keyboard row, numeric keypad, or letter characters on your keyboard to enter characters in the **Keyboard Entry** field.

The following table lists the shortcut keys you can use to enter characters in the **Keyboard Entry** field.

Press	To send the following DTMF signal
1	"1"
2, a, A, b, B, c, C	"2"
3, d, D, e, E, f, F	"3"
4, g, G, h, H, i, I	"4"
5, j, J, k, K, l, L	"5"
6, m, M, n, N, o, O	"6"
7, p, P, q, Q, r, R, s, S	"7"
8, t, T, u, U, v, V	"8"
9, w, W, x, X, y, Y, z, Z	"9"
0 (zero)	"0"
* (asterisk)	"*"
# (pound)	"#"

Handling simultaneous voice work items

Depending on your workload and your setup, you might have more than one voice work item in My Work List. In Avaya Agent Web Client, you can handle more than one voice work item at the same time. For example, you can talk with one customer while another customer finds information that you need.

**Tip:**

You need not pause your other voice work items before you accept or resume another. Your current voice work item is paused automatically.

To handle simultaneous sessions with multiple customers

1. If Auto Answer is not set on, double-click the voice work item to accept it.
2. Ask for information from the customer. You can use the Details Tab-set to review customer and work item information.

You might receive another voice work item.

3. If desired, click **Pause** to place the first voice work item on hold.
4. Accept the new incoming voice work item and make it the current work item.
5. If desired, click **Pause** to place the second voice work item on hold while you complete the first voice work item.
6. To return to the first voice work item, make that work item the current work item.
7. Finish the first voice work item and click **Release**.

If your company requires you to enter wrap up information for each work item, you enter the wrap up phase.

8. In the **Wrap Up Selections** window, click the **Current** tab and select a set of wrap up codes.

For more information, see [Wrapping up the current work item](#) on page 205.

9. Select the second voice work item in My Work List and make it the current voice work item.
10. If you do not have the information the customer needs, click **Transfer** or **Consult** to transfer the second voice work item to another agent. For more information, see [Involving others in a telephone call](#) on page 87.

Creating an outbound telephone call

While working on the voice work item, you might need to place an outbound telephone call.

To create an outbound telephone call

1. On the **Toolbar Quick Find**, do one of the following:
 - Enter a telephone number or queue.
 - Select a telephone number or queue from the drop down list.
 - Leave the **Toolbar Quick Find** empty.

2. Select **New Communication > New Call**.

If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the **Address Book**.

Avaya Agent Web Client adds the voice work item to My Work List and dials the number.

Related topics

[Work Handling toolbar](#) on page 216

[Making a voice work item the current work item](#) on page 86

[Using the address book](#) on page 162

Releasing a voice work item

When you have finished with a voice work item, you must release the work item to end the "active" portion of the work item. Depending on your setup, you might select another work item to handle, or you might enter the wrap up phase. For more information about release and wrap up options, see [About the wrap up phase](#) on page 202.

Your contact center determines which steps you perform when you release a voice work item. This section provides an overview of the steps that are typically performed. However, a contact center can customize the release procedures. Contact your supervisor if you are unsure of the procedure in your contact center, or if the following procedures do not match what you see in Avaya Agent Web Client.



Tip:

Depending on your setup, Avaya Agent Web Client might automatically release a voice work item if the customer is the first to hang up. If this happens, you might move on to the next work item, or automatically enter wrap up or after contact work.

To release the current voice work item

1. If you have not already done so, make the voice work item that you want to release the current work item. For more information, see [Making a voice work item the current work item](#) on page 86.
2. If your contact center has configured wrap up as optional, and you want to perform wrap up on this work item, select **Request Wrap Up**.
3. On the Work Handling toolbar, click **Release**.
4. Depending on the options presented, do one of the following:
 - If the work item disappears from your work lists and the **Wrap Up Selections** window does not open, select another work item from your work lists.

OR

- If the **Wrap Up Selections** window opens, see [Wrapping up the current work item](#) on page 205.

OR

- If you enter after contact work, perform the required tasks in the third-party application. The **Wrap Up Selections** window might display after you complete the after contact work.



Tip:

If you are configured for timed after contact work, the voice work item remains in My Work List for a predetermined number of seconds. After that time, Avaya Agent Web Client automatically completes the work item. During this period of time, **Release** changes to **Complete**. If you finish the after contact work early, you can select **Complete** to remove the voice work item from My Work List.

Chapter 8: Managing chat work items

Avaya Agent Web Client displays chat sessions as chat work items in My Work List. You are ready to use the Work Management Console panes to manage chat work items.

This section discusses the following topics

- [Starting the Chat application](#) on page 96
- [Handling chat work items](#) on page 97
- [Handling simultaneous chat work items](#) on page 109
- [Using Phone in a Chat Session](#) on page 109
- [Handling Join-Us Conference](#) on page 114
- [Involving other agents in a chat work item](#) on page 116
- [Using Phone in a Chat Session](#) on page 109
- [Using resources in a chat work item](#) on page 117
- [Using multiple languages in chat work items](#) on page 120
- [Monitoring a Chat Session \(Supervisors Only\)](#) on page 121

Starting the Chat application

Depending on your Avaya Agent Web Client setup, you can choose either of the following options when a chat work item arrives at you:

- Automatically accept the chat and add it to your work lists.
- Accept or decline the chat when the alert for the chat work item arrives.

Note:

Depending on your setup, the Chat application might be displayed automatically when you make a chat work item current, or you might need to start the Chat application from the **Agent Tools** menu.

To start the Chat application:

- Double-click a chat work item in **My Work List** to make it the current work item.
- OR
- From the **Agent Tools** menu, select **Chat Application**.

Related topics

[Chat application](#) on page 30

[Chat toolbar](#) on page 219

Handling chat work items

When you or Avaya Agent Web Client accept a chat work item:

- Use the work lists to select new work and to review general work item information. For more information, see [My Work List](#) on page 25 and [Chat work list](#) on page 34.
- Use the Details Tab-set to review information about the chat work item, work associated with the customer, and historical information about the work item. For more information, see [Viewing customer and work item information](#) on page 70.
- Use the Chat application to handle the chat work item.

This section discusses the following topics

- [Receiving a new chat work item](#) on page 97
- [Accepting an alerting chat work item](#) on page 98
- [Making a chat work item the current work item](#) on page 99
- [Handling the current chat work item](#) on page 99
- [Releasing a chat work item](#) on page 101
- [Pushing a Web page address to a customer](#) on page 102
- [Using Auto Sync](#) on page 103
- [Using Collaborative Form Filling](#) on page 104
- [Spell checking your messages](#) on page 106
- [Working with the transcript](#) on page 107

Receiving a new chat work item

Avaya Agent Web Client notifies you that a new work item arrived in one of the following ways:

- A window opens to notify you of a new work item and ask if you want to work on it now. You can configure Avaya Agent Web Client to notify you this way. For more information, see [Setting general preferences](#) on page 63.
- A new work item arrives in the work list with an **Alerting** icon. You must accept the work item manually.

- A new work item arrives in the work list and Avaya Agent Web Client accepts the work item automatically. The work item is in bold characters.

Related topics

[Setting your availability for work](#) on page 56

[Setting chat preferences](#) on page 66

Accepting an alerting chat work item

Depending on your setup, new chat work items might arrive in your work lists in an alerting state with an alerting icon. If you are set up to work on more than one chat, you can have several alerting chat work items in your work list.

To accept an alerting chat work item, do one of the following

- Double-click the chat work item you want to accept.
OR
- In the Chat application, select the work item in the Chat work list, then select **Actions > Accept**.
OR
- In My Work List or the Chat work list, select the work item in the work list, then select the alerting **Accept** button.

Depending on your setup, you might also be able to decline an alerting chat work item. If you decline a chat work item, you make yourself unavailable for Chat. You must make yourself available for Chat to receive new work items. To decline handling a work item, select the work item, and then select **Actions > Decline**.



Tip:

Check with your supervisor about the policy in your contact center with respect to when you should decline a work item.

Making a chat work item the current work item

The current work item is the piece of work against which you are accumulating work time. You can have one work item that is current and another work item that is selected or highlighted. The current work item is active and displayed in the Chat application. The selected work item is inactive and in preview mode.

To make a chat work item the current work item

1. Select a work item in the work list.

The work item displays information about the customer in the Details Tab-set. For more information, see [Details Tab-set](#) on page 70.

2. Depending on how you received the selected work item, use one of the following methods:

- Select **Resume** on the work handling toolbar.
OR
- Press **Enter**.
OR
- Double-click the selected work item.
OR
- Right-click to display a context menu, then select **Resume**.

Handling the current chat work item

When customers visit the Website for your contact center, they can log in with a user name and password, or they can log in as a guest. You see the user name or "guest" in the **Customer** column of the Chat application and in the chat transcript.

This section describes how to handle a chat work item after you have made that work item current. For information on how to make an item current, see [Making a chat work item the current work item](#) on page 99.



Tip:

Start the chat session as instructed by your supervisor. For example, you can type "Hello" and introduce yourself.

To handle the current chat work item:

1. In the Chat application, read the following information in the **Transcript** area:
 - Initial message from the customer

- Message that identifies the language of the customer

When the transcript of your chat gets too long for the **Transcript** area, use the scroll bar to move up and down in the transcript.

2. In the **Message** area, type a message in response to your customer's question.
3. When your message is ready, click **Send** to deliver the message to the customer chat client.

Depending on your setup, Avaya Agent Web Client may automatically check the spelling of your messages, and send the message to the customer. For information about how to spell check your messages, see [Spell checking your messages](#) on page 106.

Your customer sees the message you just sent in the customer chat client. In the Chat application, your message moves to the **Transcript** area. The message starts with your preferred name followed by a colon.

As you wait for a response, the **Agent Waiting** column in the work list records the time until you receive a response. After you receive the response, the **Customer Waiting** column records the time until you reply.

The chat window also displays the typing status at the bottom of the window. The customer can view the typing status of an agent and the agent can view the typing status of the customer.

4. If desired, you can push a Web page to the customer at any time during the chat session. For more information, see [Pushing a Web page address to a customer](#) on page 102.
5. As you handle the current chat work item, consider whether any of the text resources or Web page resources in the Resources pane will help the customer. For more information, see [Using resources in a chat work item](#) on page 117.
6. If desired, you can use any of the following features in a chat work item:
 - Transfer or conference the current chat work item to another agent. For more information, see [Involving other agents in a chat work item](#) on page 116.
 - Print or save the chat transcript or the currently displayed chat messages. For more information, see [Working with the transcript](#) on page 107.
7. When your customer is satisfied, you can end the chat work item. For more information, see [Releasing a chat work item](#) on page 101.

Related topics

[Chat application](#) on page 30

[Chat toolbar](#) on page 219

[Using the Web Self-Service database](#) on page 196

Releasing a chat work item

When you have finished with a chat work item, you must release the work item to end the "active" portion of the work item. Depending on your setup, you might select another work item to handle, or you might enter the wrap up phase. For more information about release and wrap up options, see [About the wrap up phase](#) on page 202.

Your contact center determines which steps you perform when you release a chat work item. This section provides an overview of the steps that are usually performed. However, a contact center can customize the release procedures. Contact your supervisor if you are unsure of the procedure in your contact center, or if the following procedures do not match what you see in Avaya Agent Web Client.



Tip:

Depending on your setup, Avaya Agent Web Client might automatically release a chat work item if the customer is the first to leave the chat session. If this happens, you might move on to the next work item, or automatically enter wrap up or after contact work.

To release the current chat work item:

1. If you have not already done so, make the chat work item that you want to release the current work item. For more information, see [Making a chat work item the current work item](#) on page 99.
2. If your contact center has configured wrap up as optional, and you want to perform wrap up on this work item, select **Request Wrap Up**.
3. To release the work item
 - In the Chat application, select **Actions > Release**.
 - On the **Chat** toolbar or the **Work Handling** toolbar, select **Release**.
4. Depending on the options presented, do one of the following:
 - If the work item disappears from your work lists and the **Wrap Up Selections** window does not open, select another work item from your work lists.
OR
 - If the **Wrap Up Selections** window opens, see [Wrapping up the current work item](#) on page 205.
OR
 - If you enter after contact work, perform the required tasks in the third-party application. The **Wrap Up Selections** window might display after you complete the after contact work.

Pushing a Web page address to a customer

At any time during a chat work item, you can push a Web page address to the customer. The new Internet Explorer browser window opens on your desktop as well as on the customer's desktop and the displays the URL that is pushed.



Tip:

If you want to push a Web page address repeatedly to customers, create a Web page resource. For more information, see [Creating a Web page resource](#) on page 185.

This section discusses the following topics:

- [Acceptable Web page address formats](#) on page 102
- [Unacceptable Web page address formats](#) on page 102
- [Pushing a Web page address](#) on page 103

Acceptable Web page address formats

You can push any Web page address that starts with the following formats:

Format	Example of valid Web page address
http://	http://www.avaya.com
https://	https://marketplace.company.com
www	www.avaya.com Avaya Agent Web Client adds http:// to the beginning of this Web page address to convert it to a valid format. Note: You can only use this format if http://www is part of the Web page address. For example, you cannot use www.support.avaya.com because the correct Web page address is http://support.avaya.com.

Unacceptable Web page address formats

You cannot push a Web page address that:

- Starts with ftp://. For example, do not push ftp://ftpsite.com. If a customer needs the address of an FTP site, send the Web page address as text from the **Message** area. Then, ask the customer to copy the address into their browser.
- Should have www in the address but the www is missing. For example, do not push avaya.com. Instead, push www.avaya.com or http://www.avaya.com.

Pushing a Web page address

To push a Web page address to the customer

1. Enter the Web page address in the **Web Page Address** field.
Do not enter any text other than the address in the **Web Page Address** field.
2. Select **Push**.
3. Verify with your customer and any other participants in the chat session that the Web page address opened properly in their Web browsers.

Using Auto Sync

With Auto Sync, you and your chat customer can navigate the Web together, that is, you can see the same Web pages at the same time. You are always in the lead.

When you click Auto Sync, any hyperlink that you click in your browser, is followed in the customer's browser.

You can click the **Auto Sync** button to start or stop auto synchronizing of the browser pages.

To use Auto Sync to share Web pages with your customer

1. While in a chat session, tell your customer that you are going to lead them as you navigate through some Web pages. Explain that they will see the same pages in their browser that you see in yours.
2. Go to a Web page that you want your customer to see.
3. Click the Auto Sync button.

The Web page in your browser is pushed to the customer. The Auto Sync button changes to show arrows indicating that Auto Sync is turned on. The Transcript area also states that Auto Sync was turned on.

4. Ask your customer if they can see the Web page that you just navigated. Chat with your customer about the page, as appropriate.
5. If your customer wants to lead you to a different page, tell them to go to that page and click the **Say** button in their chat client. They can also paste the URL into the chat client and click **Send Page**.

On your browser, you see the page your customer sends you. You can also see the URL the customer typed in the Transcript area of the chat application.

6. Continue to share Web pages with your customer, until you satisfy their request and answer all their questions.

**Tip:**

In the Transcript area, you can see the URLs of all the pages you and your customer shared.

7. Click the Auto Sync button again when you want to end the Auto Sync session.

The button changes to indicate that it is turned off. The Transcript states that Auto Sync was turned off. You can easily start another session with this customer whenever you want by clicking the Auto Sync button again.

**Tip:**

If you begin a chat session with another customer before you complete the chat session you are currently handling, another browser will open for the second customer.

Out of Sync Message

When you are in a chat or chat and collaboration session with your customer, it may happen that your customer navigate to a Web page, different than the Web page that you have pushed. In this case, you are not in synch with your customer and a message "**Client browser is out-of-sync with the agent browser**" is displayed in the **Transcript** window of all the people involved in the conversation. Additionally, a message "**Please check auto sync**" is also displayed in your transcript window.

Note:

You can configure the text for both messages.

When out of sync message appears, you can either click **Auto Sync** to sync the browser page at the customer end or inform your customer that they are no longer viewing the same page.

Using Collaborative Form Filling

With collaborative form filling, you help your chat customer to properly navigate the Web page and fill the Web forms. While filling the forms, collaborating with the customer, you and your customer sees the same Web form at the same time.

When you or your customer fills information in any field, the information is displayed at both the ends at the same time.

Note:

Before you starts filling the forms in collaboration, ensure that properties are selected or set to true.

chat.htmlclient.collaboration.enabled	To enable the customer for Collaborative Form Filling. Set this property in the Chat properties section on the administration page of Multi-Tenant Administration.
CollaborationEnabled	To enable the agent for Collaborative Form Filling. Set this property in IC Manager.

Note:

During a collaborative form filling session where you or your customer has filled some data in the form on a web page and if you decide to transfer the work item to another agent or conference with another agent, the Web page is sent to other agent along with the data.

You can help your chat customer to fill information on a Web page forms as follows:

To help your customer fill in a form

1. Verify that your chat customer wants you to help in filling a form.
2. Ask whether the customer is currently viewing the form.
3. If the customer is viewing the form, ask the customer to click the **Send Page** button.

The page is displayed on your browser. If the customer has entered any information, you can also view that information.

4. If the customer is not viewing the form and you know where the form is located, take the following steps:
 - a. Go to the URL in your browser and click **Auto Sync**.
OR
 - b. Type the URL in the Text Entry area and click **Push**.
The customer sees the page in their browser.
5. If the customer is not viewing the form and you do not know the URL, ask the customer to go to the page that contains the form and click the **Send Page** button.
6. Take turns with your customer, as needed, to fill out the form.

Everything you type in the form is displayed immediately in the browser at the customer end. Everything your customer types is displayed in your browser as soon as the customer clicks the **Send Page** button.

**Tip:**

Take turns with your customer. If you and your customer type simultaneously, the information you enter is garbled. If this happens, ask your customer to click the **Send Page** button again.

7. Ensure that your customer clicks the appropriate button to submit the form when the form is finished.

**Tip:**

When your customer clicks the button, the page you are viewing may be different from your customer's page. In this case, you can ask your customer to click the **Send Page** button again.

Spell checking your messages

Spelling errors can make your messages difficult to read and can sometimes lead customers to misunderstand what you type. Therefore, it is a good idea to spell check each message before you send it to the customer.

Depending on your setup, Avaya Agent Web Client might automatically check the spelling of your messages after you select **Send**. If Avaya Agent Web Client does not check the spelling automatically, you can use the Spelling feature to check the spelling.

The Spelling feature can spell check chat work items in multiple languages. To set your preferences for an international dictionary, see [Setting spelling preferences](#) on page 67.

To spell check your messages

1. If Avaya Agent Web Client does not automatically check the spelling of your messages, select **Tools > Spelling**.

Avaya Agent Web Client checks the spelling of your message. If Spelling finds errors or words that are not in the dictionary, Spelling displays that word in the **Not in Dictionary** field. For more information see, [Correcting spelling errors](#) on page 193.

2. When the spell check is complete, select **Close**.

Working with the transcript

Note:

The Chat application does not display the transcript after you complete the chat work item. You must copy, paste, or print the transcript text before you complete a work item.

This section discusses the following topics:

- [Copying and pasting transcript text](#) on page 107
- [Saving a copy of a transcript](#) on page 107
- [Printing a transcript](#) on page 108

Copying and pasting transcript text

You can use Windows hot keys to copy and paste the transcript.

To copy and paste

1. Copy the transcript text
 - For part or all the transcript, select the text and press **Control+C**.
 - For the entire transcript, click in the **Transcript** area and press **Control+A**, then **Control+C**.
2. Paste the transcript in a field or another application
 - Click the mouse or cursor in the field or application and press **Control+V**.

Saving a copy of a transcript

Use this procedure to save a copy of a chat transcript for your own records.

To save a copy of the transcript

1. Copy the text of the transcript.
2. Paste the text in an application such as Microsoft Word.
3. Save the file with the transcript.

Printing a transcript

To print the browser window

- Click the mouse or cursor in the window, press **Control+P**.

To print the entire transcript

1. Select **File > Print**.

Avaya Agent Web Client displays the **Print** window for your computer.

2. In the **Print** window
 - a. If required, select a different printer from the default printer.
 - b. Select the page range to print all the pages or only some pages.
 - c. Select how many copies to print.
 - d. Select **Print** to print the transcript.

Note:

The options available in the **Print** dialog box and the names of the fields depend upon the computer operating system and your setup.

Transferring a chat work item



Tip:

You can only transfer the current chat work item.

To transfer a chat work item

1. Explain to the customer that you are going to transfer the chat session to another agent.
2. (Optional) In the **Toolbar Quick Find**, select or enter a destination. For more information, see [Using Toolbar Quick Find](#) on page 169.
3. From the **Chat** menu bar, select **Actions > Transfer**.
4. If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the **Address Book** window. Select a destination in the **To** field.
5. Avaya Agent Web Client transfers the chat work item to the selected destination.

Handling simultaneous chat work items

Depending on your workload, you might have more than one chat work item in your work lists. You can handle more than one chat work item simultaneously. For example, you can chat with one chat customer while other chat customers read information that you send them or try your suggestions.

To handle simultaneous sessions with multiple customers

1. After you respond to the customer in your current work item, double-click another chat work item in your Chat work list. Usually, you select the next chat work item in the work list.

The selected work item becomes the current work item. The Chat application displays that work item in the **Transcript** area. Avaya Agent Web Client makes the original work item inactive and displays the appropriate time for that work item.

2. Type and send a message to the new customer.
3. Whenever you return to the original customer, double-click that customer's work item in the Chat work list to make it the current work item.

The Chat application display information about this work item, including the transcript of your previous conversation.

4. If your workload allows you to handle more chat customers and you want to add another, repeat Steps 1 to 3.

Your workload for chat is the maximum number of chat work items you can handle simultaneously. This number, which can change during your login session, is displayed in your Chat preferences. For more information, see [Setting chat preferences](#) on page 66.



Tip:

If one of your chat customers needs more attention, you can transfer that work item to another agent.

5. When a customer is satisfied, you can end that chat work item. For more information, see [Releasing a chat work item](#) on page 101.

The other chat work items remain active until you end them.

Using Phone in a Chat Session

While connected to a customer in a chat session, you can also speak to the customer, using Voice Chat. You can use two types of Voice Chat:

- Chat & Callback

- Chat & VoIP

The two types of Voice Chat may appear almost the same to you. In both types, you speak to your chat customer over your telephone. However, the VoIP call is different for customers because in the VoIP call they speak to you using the computer, rather than a telephone.

See the following sections for information:

- [Handling a Chat & Callback Session](#) on page 110
- [Handling a Chat and VoIP Session](#) on page 112

Handling a Chat & Callback Session

You and your chat customer can speak to each other over the telephone while you remain in the chat session together. You can receive a chat contact with a request for this type of session or you can suggest it to a chat customer. Read the appropriate procedure, depending on whether your customer requested a Chat and Callback session or you want to suggest one to your customer.

- [Responding to a Chat and Callback Request](#) on page 110
- [Collaborating a Chat and Callback Request](#) on page 111

You can use the Softphone interface in the Avaya Agent to control the telephone call portion of a Chat and Callback session. For information on handling a call with Softphone, see the *Handling a Basic Voice Contact* topic in the *Avaya Agent User Guide*.

Responding to a Chat and Callback Request

When a customer initiates a Chat & Callback request from the Web site, the request comes as a chat contact. After you begin the chat session, you can initiate the telephone call, as described in the following procedure.

To respond to a Chat and Callback request

1. Double-click the Chat & Callback contact in the Chat task list.

The Chat application opens with the selected contact currently active. The Chat extended toolbar is displayed, as described in [Chat extended toolbar](#) on page 221.

If the customer entered their telephone number from the Web site, you can see their telephone number in the **Callback on this number** field.



Tip:

You may want to verify with your customer that the number appeared is the correct telephone number, and if required make any necessary changes in the text field.

2. Type a message to the customer in the **Message** box and click **Send** to send the message.

For example, you may say, "Hello, Maria. I see that you want me to call you on the phone. I will call you now at the number you entered."

3. If you do not see a telephone number in the **Callback on this number** field ask the customer to send the phone number in a text message, and then type or copy the phone number in the **Callback on this number** field.
4. If necessary, put on your headphones.
5. Click the **Initiate PSTN callback** button beside the **Callback on this number** field.

You hear noise as the system dials the telephone number. Then you hear the customer's telephone ring. If you need to cancel the call before it is completed, click the **Hangup** button in the Softphone.

6. When your customer answers the telephone, say "Hello" and introduce yourself as the agent who is in a chat session with them. Begin helping your customer.
7. When you are certain that the customer is satisfied, say good-bye and hang up the telephone.



CAUTION:

If you release the chat contact first, the voice contact is also released with the chat contact.

8. Finish chatting with the customer. Then click the **Release** button in the Chat toolbar to release the chat contact.

Collaborating a Chat and Callback Request

Any time when you are chatting with a customer, you can collaborate with other agents. Collaborating Chat and Callback request can be referred as multimedia interaction because both the text and voice are communicated among each other.

To collaborate Chat and Callback request

1. Accept the Chat and Callback request made by your customer.
The Chat application window opens.
2. Ask your customer if the callback number is correct and click the **Initiate PSTN callback** button to place a voice call on the callback number provided by the customer.
When the Customer accepts the voice call, both chat and voice communication acts as a single media interaction at your end.
3. Explain to the customer that you want to involve another agent in this Chat and Callback session.
4. (Optional) Select or enter the destination agent in the **Quick Find** field on the work handling toolbar. For more information, see [Using Toolbar Quick Find](#) on page 169.

Note:

If the **Quick Find** field is empty, Avaya Agent Web Client displays the **Address Book** window. Select or enter a destination in the **To** field.

**Important:**

For collaborating a multimedia interaction, you must find an agent using the agent ID or the address book and not the station ID.

5. Use one of the following methods to collaborate:

- From the Chat toolbar, click the **Conference** or **Transfer** button
- OR
- From the Chat menu bar, select **Actions > Conference** or **Actions > Transfer**.

The voice interaction is sent to the other agent and the **Multimedia Interaction Collaboration** dialog box opens at your end.

Note:

For Multimedia Interaction, voice interaction is always collaborated first so that you can consult with the other agent before collaborating chat interaction.

6. After the other agent accepts the voice interaction, send the chat interaction to the other agent and complete the collaboration.

Handling a Chat and VoIP Session

Many customers who are browsing your company's Web site cannot use their telephone while they are connected to the Internet. If they want to ask a question, they can click a **Chat & VoIP** button so that they can continue browsing the Web site while speaking with you. If you are enabled to receive chat and VoIP type of contact, the request may be routed to you and appear in your Chat task list. You must initiate the Chat and VoIP feature from the Chat application.

- [Responding to a Chat and VoIP Request](#) on page 112
- [Collaborating a Chat and VoIP Request](#) on page 113

After you connect to your chat customer through VoIP, you will speak to the customer over your telephone.

Responding to a Chat and VoIP Request

When a customer requests a Chat & VoIP call from the Web site, the request comes as a chat contact. After you begin the chat session, you must connect the telephone call, as described in the following procedure.

To respond to a Chat and VoIP request

1. Select the Chat & VoIP contact in your Chat application window.

2. Click the **Resume** button to make the selected contact current.
3. Type a message to the customer in the Text Entry area and click **Send** to send the message.
4. If the customer is not familiar with this type of call, ask them to ensure that the following statements are true:
 - They are using the Windows operating system.
 - They are using one of the following Internet browsers:
 - Internet Explorer 6.x or 7
 - Speakers, microphone, and sound card on their computer exist. The speakers are turned on and the microphone is plugged in to the computer.
 - Their audio device is not already in use, such as playing music.
5. If necessary, put on your headphones.
6. Click the **Initiate VoIP callback** button. The customer's chat client and your Web Client show the status as the connection is made.
7. When the status message informs you that the connection is made, say "Hello" to your customer and ask them if they can hear you.

**Tip:**

If the connection breaks during the session, you receive a message to help the customer troubleshoot the problem.

8. Help your customer with the original question or problem.
9. When the customer is satisfied, say good-bye and then click the **Hangup** button in Softphone.

**CAUTION:**

If you release the chat contact first, the voice contact is also released with the chat contact.

10. Finish chatting with the customer. Then click the **Release** button in the Chat toolbar to release the chat contact.

Collaborating a Chat and VoIP Request

Any time when you are chatting with a customer, you can collaborate with other agents. Collaborating Chat and VoIP request can be referred as multimedia interaction because both the text and voice are communicated among each other.

To collaborate Chat and VoIP request

1. Accept the Chat and VoIP request made by your customer.

The Chat application window opens.

2. Click the **Initiate VoIP callback** button to place a voice call.
When the Customer accepts the voice call, both chat and voice communication acts as a single multimedia interaction at your end.
3. Explain to the customer that you want to involve another agent in this Chat and VoIP session.
4. (Optional) Select or enter the destination agent in the **Quick Find** field on the work handling toolbar. For more information, see [Using Toolbar Quick Find](#) on page 169.

Note:

If the **Quick Find** field is empty, Avaya Agent Web Client displays the **Address Book** window. Select or enter a destination in the **To** field.

**Important:**

For multimedia interactions, you must find an agent using the agent ID or the address book and not the station ID.

5. Use one of the following methods to collaborate:
 - From the Chat extended toolbar, click the **Conference** or **Transfer** button
 - OR
 - From the Chat menu bar, select **Actions > Conference** or **Actions > Transfer**.

The voice interaction is sent to the other agent and the **Multimedia Interaction Collaboration** dialog box opens at your end.

Note:

For Multimedia Interaction, voice interaction is always collaborated first so that you can consult with the other agent before collaborating chat interaction.

6. After the other agent accepts the voice interaction, send the chat interaction to the other agent and complete the collaboration.

Handling Join-Us Conference

During the chat session, you can involve additional customer as follows:

- On request from the customer about inviting an additional customer, create a handle or a user name for that new person.
- Send the handle and the URL for accessing the site to that new customer.
- The person accesses the received URL and enters the handle.
- On submitting the handle successfully, the new customer joins the existing chat session.

To establish a Join-us for chat session

1. Get a request from the customer about inviting additional person, who might be a friend of the customer in the chat session.
2. Explain to the customer about how their friend can join the chat session by accessing the specific Web address (URL) and entering a specific user name or a handle. Tell the customer that their friend must get the URL and handle to join the chat session. You can ask the customer about a preferred method for sending the details:
 - You send the information to your customer and the customer passes it on to their friend.
 - You send the information directly to the customer's friend through the email account.
 - You call the customer's friend on the telephone and give the information.
3. Based on the above chosen method, you can ask the customer to send the email address or telephone number of the friend.
4. Click the **JoinUs** button in the Chat application window.

The **JoinUs** dialog box opens displaying a unique handle generated by the application. You can change the handle. However, Avaya recommends that you should not change the handle generated by the application.

Note:

The **JoinUs** handle is displayed in the format: <customername><hhmmss>.



Tip:

Note down the handle and the name of the friend to remember it later.

5. Whether by email or by telephone, inform the friend the URL and the handle for the Join-Us Conference, as follows:
 - a. Unless your administrator has changed it, the URL is `website\public\joinus.jsp`.
 - b. Tell that person to enter the following:
 - **JoinUs Name:** Any display name
 - **JoinUs password:** The handle provided by the agent.

Note:

If the Join-Us Web site asks for a password, the friend should enter the handle as a password.

- c. After entering the handle, click the **JoinUs** button.

The friend is now in the same chat room in which you and the customer are chatting. Each person can view what others are accessing or typing.

6. Manage the Join-Us conference as appropriate. Use **Auto Sync** or **push URLs** to your customer and the friend. Watch your browser as they send pages to each other.

**Tip:**

You can tell the customer and friend about how to lead the others to a Web page. They can go to the page or paste the URL in the URL box of their chat client, and then click the **Send Page** button.

Note:

If anyone from the customer or the friend closes their browser or clicks the **End Chat** button, the session continues between you and the remaining person.

7. When your customer and their friend indicate that they are finished, tell them that you will close the session. You can say good-bye.
8. Click the **Release** button to finish the Join-Us session.

Involving other agents in a chat work item

During the chat session, you can involve another agent or a supervisor in the chat work item, as follows:

- Transfer the chat work item to another agent, either directly or through a queue. When you transfer a chat work item, Avaya Agent Web Client removes the work item from your work lists after the agent to whom the work item is transferred accepts it. The work item is no longer your responsibility.
- Conference another agent into the chat session, either directly or through a queue. When you conference a chat work item, the work item remains in your work lists until you leave the chat session.

Note:

If you initiate a conference by using the hard phone, you must complete the conference using hard phone. You cannot initiate a conference from a hard phone and complete it by using soft phone used by IC clients. However, if you initiate a conference from a soft phone, you can complete the conference from the hard phone.

Establishing a conference for a chat session

**Tip:**

You can only conference the current work item.

To establish a conference for chat session

1. Explain to the customer that you will include another agent in the chat session.
2. (Optional) In the **Toolbar Quick Find**, select or enter a destination. For more information, see [Using Toolbar Quick Find](#) on page 169.

3. Use one of the following methods to select **Conference**:
 - From the work handling toolbars, select **Conference**.OR
 - From the **Chat** menu bar, select **Actions > Conference**.
4. If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the **Address Book** window. Select or enter a destination in the **To** field.

Note:

After the chat work item arrives at the selected destination, you cannot cancel the conference.

5. The other agent accepts the work item that is in conference.

Avaya Agent Web Client conferences you, the customer, and the other agent in the chat session. Each person sees the text message for each participant in the transcript window.

Using resources in a chat work item

You can use the following types of resources from your **My Resources** folder or the **Global Resources** folder in a chat work item:

- Text resources
- Web page resources

For example, you can use a text resource to send a customer the answer to a frequently asked question, or you can use a Web page resource to locate a Web page address to push to a customer.

You do not have access to email resources, email templates, or suggested responses when you handle a chat work item.



Tip:

You can set your agent preferences to immediately send a text or Web page resource to a customer when you double-click it. For more information, see [Setting chat preferences](#) on page 66.

This section discusses the following topics:

- [Inserting a resource in a chat work item](#) on page 118
- [Sending a text resource immediately](#) on page 119
- [Pushing a Web page resource to the customer](#) on page 120
- [Verifying a Web page resource](#) on page 120

Related topics

[Types and examples of resources](#) on page 175

[Viewing resources](#) on page 180

[Finding a resource](#) on page 189

Viewing the Resources pane

Use the **View** menu to use prepared sets of text and Web page resources during the chat session. You can use this menu or the toolbar to display and hide the Resources pane.

The **View** menu lists the **Resources** option.

This section discusses the following topics:

- [Expanding the Resources pane](#) on page 118
- [Collapsing the Resources pane](#) on page 118

Expanding the Resources pane

To expand the Resources pane, select **View > Resources**.

Avaya Agent Web Client displays a check mark next to the **Resources** menu option and displays the Resources pane at the right of the Chat application. The pane is attached to the Chat application.

Collapsing the Resources pane

To collapse the Resources pane, select **View > Resources**.

Avaya Agent Web Client clears the check mark from the menu option and closes the Resources pane.

Inserting a resource in a chat work item

Use this procedure to:

- Insert a text resource into the **Message** field of the Chat application.
- Insert a Web page resource into the **Web Page Address** area of the Chat application.

You can review the text in the resource, add text, or edit the text to meet the needs of the current customer before you send the message to the customer.

To insert a resource

1. Select one of the following types of resources in the Resource pane of the Chat application:
 - Text resource
 - Web page resource
2. Read the preview of each response to determine whether it applies to the question from the customer.

If you do not see a preview of the resource, select the **View** menu and ensure that there is a checkmark next to **Resource Description**. If there is no checkmark, select **Resource Description** to add a checkmark.
3. To insert the contents of the resource in the appropriate field of the Chat application, do one of the following:
 - Select **Actions > Insert**.OR
 - Right-click the resource and select **Insert**.

Depending on your setup, when you double-click on a resource, Avaya Agent Web Client might insert the contents into the appropriate field, or send the contents automatically to the customer.

For a text resource, Avaya Agent Web Client inserts the contents into the **Message** field. For a Web page resource, Avaya Agent Web Client inserts the Web page address into the **Web Page Address** field.
4. Review the text of the resource and edit, if necessary.
5. Select the following button to send the message to your customer:
 - For a text resource, select **Send**.
 - For a Web page resource, select **Push**.

Sending a text resource immediately

To send a text resource immediately

1. Select the text resource in the Resource pane of the Chat application.
2. Do one of the following:
 - Right-click the text resource and select **Send**.
 - Select **Actions > Send**.

Avaya Agent Web Client automatically sends the text of the resource to the customer. The text displays in the chat transcript as a message from you.

Pushing a Web page resource to the customer

To push a Web page resource in a chat work item

1. Select the Web page resource in the Resource pane of the Chat application.
2. Do one of the following:
 - Right-click the Web page resource and select **Push**.
 - Select **Actions > Push**.

Avaya Agent Web Client automatically sends the Web page address in the Web page resource to the customer and opens the Web page in a browser window for the customer. The Web page displays in the chat transcript as a message from you.

Verifying a Web page resource

If you are not sure whether a Web page in a Web page resource is still valid, you can open the Web page in your browser to verify it.

To verify the Web page address in a Web page resource

1. Select the Web page resource in the Resource pane of the Chat application.
2. To open the Web page in your browser, do one of the following:
 - Right-click the Web page resource and select **Display Web Page**.OR
 - Select **Actions > Display Web Page**.

Avaya Agent Web Client opens the Web page in a browser window on your desktop.

Using multiple languages in chat work items

Your customer might want to chat with you in a language that is not your primary language. If you are assigned a chat work item in another language and the language is not displayed properly, contact your administrator.

You can also spell check your messages in that language. To set your preferences for an international dictionary, see [Setting spelling preferences](#) on page 67.

If you use another language, you can create resources in that language. For more information, see [Creating resources](#) on page 183.

Monitoring a Chat Session (*Supervisors Only*)

If you are a supervisor, one of the most important ways that you can ensure quality is to monitor your agents' chat sessions. You can enter a chat session and view the interaction between the agent and the customer in real time.

Note:

Before you can monitor an agent, you must be designated as the supervisor of at least one of the agent's workgroups.

When you first enter the chat session, neither the agent nor the customer can see you. You can become visible or invisible by selecting the **Make supervisor visible/invisible** button. When you are visible or invisible, both the agent and the customer are notified.

To monitor a chat session:

1. To give your full attention to monitoring a chat session, you can set your availability for voice, chat, and email to 0 in Avaya Agent Web Client.
2. Select the **Supervisor Tools > Begin supervisor session** option on the main toolbar of the Avaya Agent Web Client.

This displays a Supervisor pane besides the interaction list panel. In this Supervisor pane, you can view the workgroup and agents currently logged-in to the chat or email session.

Note:

All the parties that are currently available in the chat session can see the message **Supervisor is available on the call** in their chat transcript window.

3. Select an agent for whom you want to monitor the chat session.

This displays all the chat and email interactions of the selected agent.

4. Double-click the chat interaction for the selected agent.

This opens the chat application window with a transcript of the current session displayed in the **Transcript** field.

Note:

By default, when you start monitoring, you are invisible to the agent and the customer you are monitoring. You cannot type any message in the Message field without making yourself visible.

5. (Optional) Click the **Make supervisor visible/invisible** button on the chat application toolbar to make yourself visible.

This broadcasts your presence to all parties in that session by displaying the **Supervisor is available on the call** message in the transcript.

6. To end your monitoring session without switching to another session, select the **Supervisor Tools > End supervisor session** option.

This ends your supervisory mode for monitoring and you can start in an agent mode.

Chapter 9: Managing email work items

Avaya Agent Web Client displays email messages as email work items in My Work List. You are ready to use the Work Management Console panes to manage email work items.

This section discusses the following topics:

- [Starting the Email application](#) on page 122
- [Handling email work items](#) on page 123
- [Formatting email text](#) on page 131
- [Using resources in an email work item](#) on page 135
- [Deferring the current email work item](#) on page 138
- [Transferring the current email work item](#) on page 139
- [Forwarding an email work item](#) on page 140
- [Requesting additional information from the customer](#) on page 144
- [Handle email alerts](#) on page 145
- [Creating a new email](#) on page 147
- [Handling quality assurance for an email work item](#) on page 149
- [Viewing related messages](#) on page 152
- [Viewing email history](#) on page 153
- [Using multiple languages with email work items](#) on page 156
- [Releasing an email work item](#) on page 156
- [Monitoring an Email Session \(Supervisors Only\)](#) on page 160

Starting the Email application

Your setup determines what will happen when an email work item arrives. For example, Avaya Agent Web Client might:

- Automatically accept the email for you and add it to your work lists.
- Alert you to the new email work item and let you choose whether to accept or decline the email.

Note:

Depending on your setup, the Email application might display automatically when you make an email work item current, or you might need to start the Email application from the **Agent Tools** menu.

To start the Email application

- Double-click an email work item in My Work List to make it the current work item.
- OR
- On **Agent Tools**, select **Agent Tools > Email Application**.

Related topics

[Email application](#) on page 40

[Email toolbar](#) on page 222

[Agent Tools pane](#) on page 225

Handling email work items

This section describes the tasks you perform when you handle an email work item.

- Use the work lists to select new work and to review general work item information. For more information, see [My Work List](#) on page 25 and [Email work list](#) on page 42.
- Use the Details Tab-set to review information about an email work item, the work associated with the customer, and historical information about the work item. For more information, see [Viewing customer and work item information](#) on page 70.
- Use the Email application to handle the email work item.

This section discusses the following topics:

- [Receiving a new email work item](#) on page 124
- [Accepting an alerting email work item](#) on page 124
- [Making an email work item the current work item](#) on page 125
- [Reviewing the current email work item](#) on page 125
- [Replying to the current email work item](#) on page 127
- [Working with attachments](#) on page 128
- [Spell checking the current email work item](#) on page 130
- [Printing the current email work item](#) on page 130

Receiving a new email work item

Avaya Agent Web Client notifies you that a new work item arrived in one of three ways:

- A window opens to notify you of a new work item and asks if you want to work on it now. You can configure Avaya Agent Web Client to notify you this way. For more information, see [Setting general preferences](#) on page 63.
- A new work item arrives in the work list with an **Alerting** icon. You must accept the work item manually.
- A new work item arrives in the work list and Avaya Agent Web Client accepts the work item automatically. The work item is in bold characters

Related topics

[Setting your availability for work](#) on page 56

[Setting e-mail preferences](#) on page 67

Accepting an alerting email work item

Depending on your setup, new email work items might arrive in your work lists in an alerting state with an alerting icon. If you are set up to handle more than one email, you can have several alerting email work items in your work list.

To accept an alerting email work item

- Double-click the email work item you want to accept.
OR
- In the Email application, select the work item in the Email work list, then select **Actions > Accept**.
OR
- In My Work List or the Email work list, select the work item, then select the alerting **Accept** button.

Depending on your setup, you might also be able to decline an alerting email work item. If you decline an email work item, you might make yourself unavailable for email. You must make yourself available for email to receive new work items. To decline handling a work item, select the work item, then select **Actions > Decline**.



Tip:

Contact your supervisor about the policy in your contact center for when to decline a work item.

Making an email work item the current work item

The current work item is the piece of work that you are actively handling and accumulating work time against. You can have one work item that is current and another work item that is selected or highlighted. The current work item is active and displayed in the **Original** tab of the Message Tab-set. The selected work item is inactive and in preview mode.

This section assumes that you have already accepted the work item. For more information, see [Accepting an alerting email work item](#) on page 124.

To make an email work item the current work item

1. Select an email work item in the work list.

If you have more than one email work item, select the oldest work item or the most urgent work item.

The work item displays information about the customer in the Details Tab-set. The information is in a preview mode. For more information, see [Reviewing customer details](#) on page 71.

2. Depending on how you received the selected work item, use one of the following methods:
 - Select **Resume** on the Work Handling toolbar.
OR
 - Press **Enter**.
OR
 - Double-click the selected work item.
OR
 - Right-click the work item, then select **Resume**.

Reviewing the current email work item

Before you handle an email work item, you can:

- Review information about the customer and the work item.
- Read the work item.
- Open and save any attachments.

This section discusses the following topics

- [Reading the current email work item](#) on page 126
- [Opening attachments to the current email work item](#) on page 126
- [Saving an attachment to the current email work item](#) on page 127

Reading the current email work item

An incoming HTML email can have two kinds of inserted images:

- Image links that point to external images. If you do not have access to the internet or are behind a proxy server you may not be able to view the images in the Message Tab-set.
- Embedded images that you can view regardless of whether you have access to the internet or not. Embedded images can greatly increase the size of your email.

You can view embedded images in the Message Tab-set and in the **Attachments** field. To save an embedded image, use the save option in the **Attachments** field.

To read the current email work item

1. Click the **Original** tab in the Message Tab-set.
2. Look at the following fields to see who sent the email work item and whether anyone else received a copy of the message:

- **To**
- **Cc**

3. Select **View > Message Header** to see the header fields of the email work item.

The message header displays in the text area of the **Original** tab above the body of the email work item. To hide the message header, select **View > Message Header** again.

4. Read the message from the customer that displays in the text area of the **Original** tab.
If necessary, use the scroll bar to see the entire message.

Opening attachments to the current email work item

To open attachments to the current email work item

1. Select the attachment in the **Attachments** field.
2. Do one of the following:
 - Right-click the attachment and select **Open**.

OR

 - Double-click the attachment.
3. If your Web browser opens a **File Download** dialog box, select **Open**.

The email attachment opens in the appropriate application.



Tip:

If you set Avaya Agent Web Client to be always on top, the **File Download** dialog box might open behind the Email application.

Saving an attachment to the current email work item

To save an attachment to the current email work item

1. Select the attachment in the **Attachments** field.
2. Right-click the attachment and select **Save As**.
3. Click **Save** in the **File Download** dialog box that opens.
4. In the **Save As** dialog box, navigate to the folder where you want to save the attachment and click **Save**.

If required, repeat these steps to save additional attachments.

Replying to the current email work item

You can send two types of replies

- **Reply** sends a response to the email address in the **From** field of the current work item.
- **Reply to All** sends a response to the email addresses in the **From** and **Cc** fields of the current work item.

You cannot see or respond to email addresses that the sender included in the **Bcc** fields.

To reply to the current email work item

1. Click **Reply** or **Reply All**.

Avaya Agent Web Client opens your reply in a **Reply** or **Reply All** tab and places the **Original** tab behind the reply tab. You can change the contents of any field in the reply tab except the **To** field. A reply is automatically addressed to the person who sent the original work item.

2. If required, change an address or add one or more addresses to the **Cc** and **Bcc** fields. You can type the email address in the field, or use the **Address Book**, as follows:
 - a. Click **Address Book**.
 - b. For each **Cc** and **Bcc** fields:
 - Select one or more addresses from the drop-down list
 - OR
 - Use the tabs to find and select an agent or a queue.

Note:

Use a semicolon to separate multiple email addresses.

- c. After you add all required email addresses, click **OK**.

For more information, see [Reviewing the current email work item](#) on page 125.

3. Compose your response to the customer in the text area of the reply tab.

4. As you handle the current email work item, consider whether you can use any of the resources in the **Resources** pane to help the customer. For more information, see [Using resources in an email work item](#) on page 135.
5. If required, you can use any of the following features in an email work item:
 - Change the format of the email work item. For more information, see [Changing the message format](#) on page 133.
 - Insert attachments in the email work item. For more information, see [Working with attachments](#) on page 128.
 - Defer the current email work item until you have all the information you need to respond to the customer. For more information, see [Deferring the current email work item](#) on page 138.
 - Request additional information from the customer. For more information, see [Requesting additional information from the customer](#) on page 144.
 - Transfer the current email work item to another agent or supervisor. For more information, see [Transferring the current email work item](#) on page 139.
 - Forward the current email work item to another agent or supervisor or to an external agent. For more information, see [Forwarding an email work item](#) on page 140.
 - Print the email work item. For more information, see [Printing the current email work item](#) on page 130.
 - Cancel the draft reply before you send it to the customer. To cancel the reply, select **Cancel** in the Message Tab-set. After you confirm that you want to cancel, Avaya Agent Web Client removes your reply and the **Reply** tab, and then displays the current email work item in the **Original** tab.
6. After you complete your response, click **Send**.
Depending on your setup, Avaya Agent Web Client might do the following before it sends your reply to the customer and other recipients:
 - Automatically check the reply for spelling errors, and then send the email to the recipients. For information about how to spell check your reply, see [Spell checking the current email work item](#) on page 130.
 - Ask you to confirm that you intend to send the reply.
7. Release and complete the email work item. For more information, see [Releasing an email work item](#) on page 156.

Working with attachments

You can insert attachments in a reply to an email work item, in a new email work item, or in a forwarded email work item.

An attachment can be any file that is available in a folder on your agent desktop or in a network folder designated by your supervisor.

This section discusses the following topics:

- [Adding attachments to the current email work item](#) on page 129
- [Deleting attachments from an email work item](#) on page 129

Adding attachments to the current email work item

You cannot add an attachment to an email work item on the **Original** tab. Repeat this procedure for each attachment.

To add an attachment to the current email work item

1. From the work item in the Message Tab-set, click **Add Attachment** on the Email application toolbar.

You can also select **Insert > File** from the menu bar or in the **Attachments** field, right-click and select **Add Attachment**.

2. In the **Attach File** window, click **Browse**.
3. Navigate to the folder and select the file that you want to attach.
4. Click **Open**.

Avaya Agent Web Client displays the directory path and file name in the **File Name** field of the **Attach File** window.

5. In the **Attach File** window, Click **Attach File**.

Avaya Agent Web Client attaches the file to the email work item, and adds the file to the list of attachments in the **Attachments** field. If the attachment is large, you might experience a brief delay while Avaya Agent Web Client uploads the file.

Deleting attachments from an email work item

You can delete one attachment or all attachments from an email work item. You cannot delete an attachment from an email work item on the **Original** tab.

Delete one attachment: Right-click the attachment in the **Attachments** field and select **Delete**.

Avaya Agent Web Client deletes the selected attachment from the email work item.

Delete all attachments: Select all the attachments in the **Attachments** field, right-click the selected attachments and select **Delete**.

To select all the attachments in the **Attachments** field, right-click an attachment and select **Select All**.

Avaya Agent Web Client deletes the attachments from the email work item.

Related topics

[Opening attachments to the current email work item](#) on page 126

[Saving an attachment to the current email work item](#) on page 127

Spell checking the current email work item

Spelling errors can make your email work items difficult to read and can sometimes lead a recipient to misunderstand what you type. Therefore, it is a good idea to spell check each email.

Depending on your setup, Avaya Agent Web Client might automatically spellcheck the contents of an email when you click **Send**. If Avaya Agent Web Client does not check the spelling automatically, you can use the Spelling feature to check the spelling.

By default, Avaya Agent Web Client only spellchecks text that you add above the quoted text from the original email work item. You can set your preferences to spell check text inserted between quoted paragraphs or below the quoted paragraphs. For more information, see [Setting spelling preferences](#) on page 67.

The Spelling feature can spellcheck the contents of email work items in languages other than English. To take advantage of this option, you must set your preferences to use an international dictionary.

Note:

The **Spelling** option in the **Tools** menu is not available from the **Original** tab. You can only spell check an email composition, such as a reply or an original email.

For more information about how to use the Spelling feature, see [Using the Spelling feature](#) on page 192.

To spell check an email work item

1. If Avaya Agent Web Client does not automatically check the spelling of your email work item, select **Tools > Spelling**.

Avaya Agent Web Client checks the spelling of your email work item. If spelling checker finds any words that are not in the dictionary, it displays that word in the **Not in Dictionary** field. For more information see, [Correcting spelling errors](#) on page 193.

2. When the spell checking is complete, click **OK**.
3. If the spell check did not start automatically, click **Send** to send your email work item to the recipients.

Printing the current email work item

You can print the original email received from the customer or you can print your draft reply.

**Tip:**

The options available in the **Print** dialog box and the names of the fields depend upon the computer operating system and your setup.

To print the current email work item

1. Click one of the following tabs in the Message Tab-set:
 - **Original** to print the original email from the customer.
 - **Reply** or **Reply All** to print your draft reply.
 - **Forward** or **Forward to External** to print your draft forward.

2. Select **File > Print**.

Avaya Agent Web Client displays the **Print** window for your computer.

3. In the **Print** window:
 - a. If required, select a different printer from the default printer.
 - b. Select the page range to print all the pages or only some pages.
 - c. Select how many copies to print.
 - d. Click **Print** to print the email work item.

Formatting email text

Avaya IC supports the following text formats for email messages and resources:

Plain text format: Plain text does not support any special formats in the body of an email message. Plain text does not support text formats or images.

HTML format: HTML supports special formats in the body of an email message. With HTML format, you can format the message text. For example, you can emphasize words with bold, italics, or colors. You can also view and insert images in an email message.

Note:

Avaya Agent Web Client does not support stationary or background images in emails. If a customer sends an email with stationary or a background image, Avaya Agent Web Client does not display the stationary background. Avaya Agent Web Client displays all other HTML formatting in the message, including any embedded images.

This section includes the following topics:

- [Adding additional font for Plain Text mode](#) on page 132
- [Changing the message format](#) on page 133

- [Formatting an HTML email message](#) on page 133

Adding additional font for Plain Text mode

By default, there are only three fonts for Plain Text mode in the agent application:

- Serif
- Sans Serif
- Monospaced

Web Agent Plain Text mode supports all the fonts that are supported by operating system. In case the administrator sets a font on the Web Agent that is not present on the customer system or email application, the default font will be used.

To add additional font for Plain Text mode:

1. Go to the following path:
`<Install Drive>:\Avaya\WebAgent`
2. In the WebAgent folder, create a folder named **Customization**.
3. In the **Customization** folder create a file named **PlainTextExtraFonts.properties**.
4. Add the required font names in the **PlainTextExtraFonts.properties** file. For example:
 Comic Sans MS
 Tahoma
 Times New Roman
5. Save the PlainTextExtraFonts.properties file.
6. Logout of the Agent application and re-login.

To view/select the newly added fonts:

1. Login to the Avaya Agent application.
2. In the **Avaya Web Agent** window, click **Tools > Preferences**.
3. In the **Web Agent Preferences** window, click the **User Interface** tab.
4. On the **User Interface** tab, in the **Font Settings** section, click **Text** tab.
5. In the **Font Name** option, click to drop-down menu to view/select the available fonts for Text mode.
6. Logout of the Agent application.
7. Login to the Agent application.

Changing the message format

The type of email message determines the message format:

- Replies and forwarded emails automatically use the same message format that Avaya Agent Web Client uses to display the original incoming email. For example, if Avaya Agent Web Client displays an incoming email in HTML format, your reply is also in HTML format.
- New outbound emails use the default format set in your preferences. To set the default format for all new outbound email messages, see [Setting e-mail preferences](#) on page 67.

If a reply or other outbound email is sent to an approver for quality assurance, the approver can change the format of the message. However, Avaya recommends that all email approvers set their email preferences to read incoming emails in HTML format. This setting ensures that Avaya Agent Web Client displays all emails that require approval in the format selected by the agent.

To change the message format, select one of the following options from the **Format** drop-down list:

- HTML
- Plain Text



Important:

If you change the format of an email message from HTML to Plain Text, you will lose all formatting, images, and other content that is not supported in plain text.

Formatting an HTML email message

You can format all HTML email messages that you create, including new outbound emails, replies to customers, and forwarded emails.

This section includes the following topics:

- [Formatting message text](#) on page 133
- [Aligning text](#) on page 134
- [Changing the font colors](#) on page 134
- [Creating a bulleted or numbered list](#) on page 135
- [Inserting an image](#) on page 135

Formatting message text

To format message text

1. Select the text you want to format.

2. On the **HTML** formatting toolbar, select one of the following options.

- Bold
- Italic
- Underline
- Font

Note:

The **Font** drop-down list displays the fonts from `Fonts` directory of the Windows system on which the Avaya Agent Web Client is running.

- Font Size

Aligning text

To align text

1. Select the text you want to align.
2. On the **HTML** formatting toolbar, select one of the following options.
 - Align Left
 - Center
 - Align Right

Changing the font colors

You can change the background color of selected text and the color of the text.

To change font color:

1. Select the text you want to format.
2. On the **HTML** formatting toolbar, click one of the following:
 - Highlight Color to change the background color of the text.
 - Foreground Color to change the color of the text.
3. In the **Font Color** dialog box:
 - a. Select the color you want to apply.
 - b. Click **OK**.

Creating a bulleted or numbered list

To create a bulleted or numbered list:

1. Select the paragraphs that you want to include in a bulleted or numbered list.
2. On the **HTML Email** toolbar, click one of the following:
 - Bullets
 - Numbering

Note:

When adding bullets or numbers, If you select multiple lines and if the selection contains empty lines, even the empty lines will be numbered or bulleted.

Inserting an image

You can insert any image that is located in a shared directory designated by your supervisor. Contact your supervisor if you cannot access this directory.

Note:

You can only insert images from directories specified by your supervisor.

Avaya recommends that you do not insert too many images in an email work item. If possible, use a link to an image on a Web server that the customer can access. The size of an email work item increases with each embedded image. Some customers may not be able to download a large email, especially an email that contains one large image or many smaller images.

To insert an image

1. Place your cursor where you want to insert the image in the email message.
2. On the **HTML** formatting toolbar, click **Insert Image**.
3. In the **Insert Image Location** dialog box, type the location of the image in the **Image URL** field.

If you do not know the image location, click **Browse** and navigate to the file that you want to attach and select the file.
4. Set the display options, if required.
5. Click **OK**.

Using resources in an email work item

You can use the following types of resources from the available resource folders in an email work item:

- Text resources

- Email resources
- Email templates
- Suggested responses

For example, you can use an email template to create a standard reply for a customer, or you can insert a text resource with a standard greeting or an email signature.

Note:

Depending on your setup, you might not have access to suggested responses when you handle an email work item.

This section discusses the following topics:

- [Resource formats for email work items](#) on page 136
- [Inserting a resource into an email work item](#) on page 137
- [Using suggested responses in an email work item](#) on page 138

Related topics

[Types and examples of resources](#) on page 175

[Viewing resources](#) on page 180

[Creating resources](#) on page 183

[Finding a resource](#) on page 189

Resource formats for email work items

The format of the resource must match the format of the email work item. If you attempt to insert a resource in the wrong format, the content of the resource may not display correctly.

The following table shows what happens when you insert a resource into an email work item.

Resource format	Email format	Result
HTML	HTML	Uses the formatting of the resource. Ignores the format of the email work item at the cursor position.
Plain text	HTML	Uses the formatting of the resource. Ignores the format of the email work item at the cursor position.
HTML	Plain text	Converts the content of the resource to plain text. Ignores all HTML formatting in the resource.
Plain text	Plain text	Inserts the resource at the cursor position.

Inserting a resource into an email work item

Use this procedure to insert most types of resources into an email work item. You can review the text in the resource, add text, or edit the text to meet the needs of the current customer before you send the email to the customer.



Important:

If an email template contains an attachment, Avaya Agent Web Client cannot add the attachment in that email template to the email message. You must use an email resource to add an attachment to an email message.

To insert a resource into an email work item

1. If the resource will add text to the body of a reply or a new email, ensure that your cursor is in the section where you want the text to be added.
2. Read the preview of each response to determine whether it applies to one or all the topics in the email work item.

If you do not see a preview of the response, select the **View** menu and ensure that there is a checkmark next to **Resource Description**. If there is no checkmark, select **Resource Description** to add a checkmark.

3. Select one of the following types of resources in the **Resource** pane of the Email application:
 - Email resource
 - Email template
 - Text resource
4. To insert the contents of the resource in the appropriate fields of the email work item, do one of the following:
 - Select **Actions > Insert**.
 - OR
 - Double-click the resource.

Avaya Agent Web Client adds the contents of the resource to the current email work item. For a text resource, Avaya Agent Web Client inserts the contents in the message body of the email. For an email resource template, Avaya Agent Web Client updates all relevant fields from the resource, and inserts the text into the body of the email work item.

5. Review the text that the resource inserted in the fields and edit, if necessary.
6. Finish your email work item and send it to your customer. For more information, see [Replying to the current email work item](#) on page 127.

Using suggested responses in an email work item

The **Suggested Responses** folder includes a list of suggested responses based on an analysis of the email work item and a percentage. The percentage indicates the likelihood that the text in the suggested response will match the topic of the email work item. For example, 100% is likely to match the email topic, and 10% is unlikely to match the email topic.

Suggested responses are temporary resources that are only available for the current email work item. When you complete each work item, Avaya Agent Web Client removes the suggested responses for that item.

To use suggested responses

1. Expand the **Suggested Responses** folder for the current email work item.
The responses with the highest scores are displayed at the top of the list.
2. Review the contents or preview for each response to determine whether it applies to the email work item.
For more information, see [Viewing resources](#) on page 180.
3. To insert the contents of a suggested response in the work item, do one of the following:
 - Double-click the suggested response.
 - OR
 - Select **Actions > Insert**.
4. Review the text inserted by the response and edit, if necessary, to ensure that they are appropriate for the current work item.
If desired, you can insert more than one suggested response in an email work item.
5. Finish your email work item and send it to your customer. For more information, see [Replying to the current email work item](#) on page 127.

Deferring the current email work item

You can defer a work item and save the current draft of your reply, if you:

- Need time to research the answer to a question in the email work item.
- Want to handle another work item while you wait for more information from the customer or from an external agent.

You can resume a paused email work item at any time.

If you have started a reply to the customer, Avaya Agent Web Client automatically saves your draft reply when you pause the current work item. You cannot transfer or forward a paused email work item.

To defer the current email work item

1. From any tab in the Message Tab-set, select **Actions > Pause** or click **Pause** on the Email application toolbar.

Avaya Agent Web Client saves the draft of any reply that you have started. The email work item remains in your Email work list. The wait time for the work item continues to count.

Note:

After you pause the email work item, you are available for another email work item.

To resume a paused email work item, see [Making an email work item the current work item](#) on page 125.

Transferring the current email work item

If you cannot handle the current work item, you can transfer that work item to another agent or to a supervisor. When you transfer an email work item, Avaya Agent Web Client removes the work item from your Email work list. The work item is no longer your responsibility.

To transfer the current work item:

1. In the **Toolbar Quick Find** on the Email application toolbar, do one of the following:

- Enter the name of an agent or queue.
- Select an agent or queue from the drop-down list.
- Leave the field empty.

2. Click **Transfer** to transfer the email work item to another agent or a supervisor.

If the **Toolbar Quick Find** includes an agent or queue, Avaya Agent Web Client completes the transfer.

If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the Address Book.

3. In the Address Book:

- a. In the **To** field, enter the address for the queue or agent.

You can type the email address in the field, select an email account or queue from the drop-down list, or find the queue or agent in the tabs. For more information, see [Using the address book](#) on page 162.

- b. In the **Comment** field, leave the predefined comment or type your own text.

- c. Click **OK** to complete the transfer.

Avaya Agent Web Client removes the work item from your work lists. Depending on your setup, you might need to wrap up the work item. For more information, see [Releasing an email work item](#) on page 156.

Forwarding an email work item

You can send two types of forwarded emails:

- **Forward** sends a copy of the current email work item to another agent or supervisor.
- **Forward to an External Agent** sends a copy of the current email work item to an external agent, so you can ask that agent for advice or information.

This section discusses the following topics:

- [Forwarding the current email work item](#) on page 140
- [Forwarding an email work item to an external agent](#) on page 141

Forwarding the current email work item

When you forward the current email work item, you send a copy of the work item to the agents and supervisors in the **To** and **Cc** fields.

Note:

Do not use **Forward** if you want to transfer responsibility for the current email work item to another agent or supervisor. To transfer responsibility, you must transfer the email. For more information, see [Transferring the current email work item](#) on page 139.

You can also forward the current email work item to an external agent for advice. For more information, see [Forwarding an email work item to an external agent](#) on page 141.

To forward the current email work item:

1. Select **Forward** or **Actions > Forward**.

Avaya Agent Web Client displays the quoted email work item in the **Forward** tab. The **Subject** field contains the original subject of the email with an FW: prefix to indicate to the recipients that this is a forwarded message.

2. Add an email address to the **To** field and, if desired, add email addresses for additional recipients in the **Cc** or **Bcc** fields.

You can type the email addresses in each field, or use the Address Book, as follows:

- a. Select **Address Book**.

- b. Select an email address from the drop-down list for each field or use the tabs to find and select an agent or a queue.

Do not add more than one email address to the **To** field. To add multiple email addresses to the **Cc** or **Bcc** fields, use a semicolon to separate multiple email addresses.

- c. After you add all desired email addresses, click **OK**.

For more information, see [Handling email work items](#) on page 123.

3. Type a message to the recipients above the email message to explain why you forwarded the email work item to them.

If desired, you can cancel the draft forward before you send it to the recipients. To cancel the email, select **Cancel** in the Message Tab-set. After you confirm that you want to cancel, Avaya Agent Web Client removes your draft and the **Forward** tab.

4. Click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it forwards the email to the recipients:

- Automatically check the reply for spelling errors, and then send the email to the recipients. For information about how to spell check your reply, see [Spell checking the current email work item](#) on page 130.
 - Ask you to confirm that you intend to send the reply.
5. Perform all other required actions to resolve the questions in the email work item and complete the work item.

For example, you can perform the actions described in the following sections:

- [Replying to the current email work item](#) on page 127
- [Transferring the current email work item](#) on page 139
- [Request additional information about the current email work item](#) on page 144
- [Releasing an email work item](#) on page 156

Forwarding an email work item to an external agent

An external agent has special knowledge or skills and can help you answer a question or solve a problem in a work item. The external agent is usually someone outside your contact center.

This section discusses the following topics:

- [Forwarding the current email work item to an external agent](#) on page 142
- [Handling a response from an external agent](#) on page 143

Forwarding the current email work item to an external agent

When you use **Forward to an External Agent**, Avaya Agent Web Client tracks the length of time it takes for you to receive a response. If the external agent does not respond within a designated period of time, Avaya Agent Web Client sends you an alert. For more information, see [Handle email alerts](#) on page 145.

To forward an email work item to an external agent

1. Select **Forward to an External Agent** or **Actions > Forward to an External Agent**.

Avaya Agent Web Client displays the quoted email work item in the **Forward to External Agent** tab.

2. Add an email address to the **To** field and, if desired, add email addresses for additional recipients in the **Cc** or **Bcc** fields.

You can type the email addresses in each field, or use the Address Book, as follows:

- a. Select **Address Book**.
- b. Select an email address from the drop-down list for each field or use the tabs to find and select an agent or a queue.

The Address Book identifies external agents on the agent tabs with the **External Agent** icon. For more information about that icon, see [Understanding agent status icons](#) on page 163.

Do not add more than one email address to the **To** field. To add multiple email addresses to the **Cc** or **Bcc** fields, use a semicolon to separate multiple email addresses.

- c. After you add all desired email addresses, click **OK**.

For more information, see [Reading the current email work item](#) on page 126.

3. Type a message to the recipients above the email message to explain what advice or information you need from them.

If desired, you can cancel the draft forward before you send it to the recipients. To cancel the email, select **Cancel** in the Message Tab-set. After you confirm that you want to cancel, Avaya Agent Web Client removes your draft and the **Forward to External Agent** tab.

4. Click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends the forwarded email to the external agent.

- Automatically check the forwarded email for spelling errors, and then send the email to the recipients. For information about how to spell check your email, see [Spell checking the current email work item](#) on page 130.
- Ask you to confirm that you intend to send the forwarded email work item.

5. Pause the email work item while you wait for a response from the external agent. For more information, see [Deferring the current email work item](#) on page 138.

Handling a response from an external agent

When you receive a response from a **Forward to External Agent** email, Avaya Agent Web Client uses a special icon in the work lists to identify the email work item. For more information about that icon, see [Email work item icons](#) on page 44.

To handle a response from an external agent

1. Make the response from the external agent the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. Select **View > Related Messages** to locate the original email work item from the customer in your Email work list. For more information, see [Viewing related messages](#) on page 152.
3. Read the response from the external agent and any attachments to that response. For more information, see [Reviewing the current email work item](#) on page 125.
4. Save any attachments that you need to insert in the reply to the customer. For more information, see [Saving an attachment to the current email work item](#) on page 127.
5. Select **Actions > Resume** to resume the original email work item from the customer and make it the current work item.
6. Finish your draft reply to the customer with the information provided by the external agent. For more information, see [Replying to the current email work item](#) on page 127.

If desired, you can copy text from the response and paste it into your draft reply to the original email work item. You can use standard Windows commands, such as **Control+C** and **Control+V**, to copy and paste text.

7. Click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends the reply.

- Automatically check the reply for spelling errors, and then send the email to the recipients. For information about how to spell check your reply, see [Spell checking the current email work item](#) on page 130.
 - Ask you to confirm that you intend to send the reply.
8. Release and complete the original email work item and the response from the external agent. For more information, see [Releasing an email work item](#) on page 156.

Requesting additional information from the customer

If a customer sends you an email with incomplete information, you can request additional information from the customer. For example, the customer who wants to place an order forgot to include a ZIP code in the shipping address.

This section discusses the following topics:

- [Request additional information about the current email work item](#) on page 144
- [Handling a response to a request for additional information](#) on page 145

Request additional information about the current email work item

When you use **Request additional information**, Avaya Agent Web Client tracks the length of time it takes for you to receive a response. If the customer does not respond within a designated period of time, Avaya Agent Web Client sends you an alert. For more information, see [Handle email alerts](#) on page 145.

To request additional information about the current email work item

1. Reply to the current email work item. For more information, see [Replying to the current email work item](#) on page 127.
2. In the reply tab, select **Request additional information**.
3. Type a message to the customer above the text of the original email message to explain what additional information you need.
4. If desired, add an attachment to the reply. For example, attach a form that the customer forgot to complete. For more information, see [Adding attachments to the current email work item](#) on page 129.
5. Click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends the request for additional information to the customer.

- Automatically check the reply for spelling errors, and then send the email to the customer. For information about how to spell check your email, see [Spell checking the current email work item](#) on page 130.
 - Ask you to confirm that you intend to send the reply.
6. Pause the email work item while you wait for a response from the customer. For more information, see [Deferring the current email work item](#) on page 138.

Handling a response to a request for additional information

When you receive a response from a **Request additional information** email, Avaya Agent Web Client uses a special icon in the work lists to identify the email work item. For more information about that icon, see [Email work item icons](#) on page 44.

To handle a response to a request for additional information

1. Make the response from the customer the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. Select **View > Related Messages** to locate the original email work item from the customer in your Email work list. For more information, see [Viewing related messages](#) on page 152.
3. Read the response from the customer with the additional information and any attachments to that response. For more information, see [Reviewing the current email work item](#) on page 125.

If desired, you can save any attachments. For more information, see [Saving an attachment to the current email work item](#) on page 127.

4. Select **Actions > Resume** to resume the original email work item from the customer and make it the current work item.
5. Finish your draft reply to the customer and any other work required by the email work item. For more information, see [Replying to the current email work item](#) on page 127.
6. Click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends the reply.

- Automatically check the reply for spelling errors, and then send the email to the recipients. For information about how to spell check your reply, see [Spell checking the current email work item](#) on page 130.
 - Ask you to confirm that you intend to send the reply.
7. Release and complete the original email work item and the response to the request for additional information. For more information, see [Releasing an email work item](#) on page 156.

Handle email alerts

Avaya Agent Web Client monitors the following types of email work items:

- Emails that forwarded to external agents
- Requests for additional information from the customer

Depending on your setup, your supervisor sets a time limit for responses to these email work items. If an agent does not receive a response within the designated time limit, Avaya Agent Web Client sends an email alert.

Each email alert in your work list displays:

- The word "ALERT" in the **Customer** column
- Either a **Customer Email Alert** icon or an **External Agent Email Alert** icon in the **Status** column. For more information about those icons, see [Email work item icons](#) on page 44.

You can receive email alerts for overdue responses to email work items sent by you or by another agent. When you receive an email alert, you must handle it immediately. The email alert displays the request for additional information that was sent to the customer or external agent.

To handle email alerts:

1. Make the email alert the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. Locate the original email work item from the customer and all related work items:
 - If you sent the work item that generated the email alert, select **View > Related Messages**. Avaya Agent Web Client locates the original email work item from the customer in your work list. For more information, see [Viewing related messages](#) on page 152.
 - If another agent sent the work item that generated the email alert, use the Email Tracking History. Avaya Agent Web Client locates the original email work item. For more information, see [Viewing the history of a current email work item](#) on page 153.
3. Read the email alert and the original email work item from the customer. For more information, see [Reviewing the current email work item](#) on page 125.
4. To follow up on the overdue work, do one of the following:
 - Call the customer or external agent on the telephone and ask for the information. For more information, see [Creating an outbound telephone call](#) on page 93.
 - Select **Send Again** to send another request for information to the customer or external agent. **Send Again** displays a new tab in the Message Tab-set with an email work item. The email work item is addressed to the customer or external agent and quotes the overdue message.
 - For a request to an external agent only, select **Forward to External Agent** to request information from another external agent. For more information, see [Forwarding an email work item to an external agent](#) on page 141.
5. Click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends the follow-up email.

- Automatically check the email for spelling errors, and then send the email to the recipients. For information about how to spell check your email, see [Spell checking the current email work item](#) on page 130.

- Ask you to confirm that you intend to send the follow-up email.
- 6. Release and complete the email alert. For more information, see [Releasing an email work item](#) on page 156.
- 7. If you receive the information from the customer or external agent, perform the steps in one of the following sections:
 - [Handling a response from an external agent](#) on page 143
 - [Handling a response to a request for additional information](#) on page 145

Related topics

[Forwarding an email work item to an external agent](#) on page 141

[Requesting additional information from the customer](#) on page 144

Creating a new email

You can create a new email from the Work Handling toolbar and in the Email application. For example, you can create a new outbound email to ask for assistance from another agent or supervisor, or to request information from someone outside the contact center.



Tip:

You can create an email in HTML or plain text format. Avaya recommends that you use plain text format. Plain text emails are usually smaller in size than HTML emails. Some customers may not be able to download a large email, especially an email that contains one large image or many smaller images.

To create a new email

1. In the Email application, select **File > New Email**.



Tip:

If you select or enter the email address in the **Toolbar Quick Find**, Avaya Agent Web Client opens the Email application with the address in the **To** field.

Avaya Agent Web Client displays the **New Email** tab in the Email application and adds the new email to your work lists.

2. In the **From** field, select an email account from the drop-down list.

All replies to this email will be sent to the email address for this account.

3. If you did not use the **Toolbar Quick Find**, type the email addresses of the recipients or use the Address Book.

Do not add more than one email address to the **To** field. To add multiple email addresses to the **Cc** or **Bcc** fields, use a semicolon to separate multiple email addresses.

- a. Select **Address Book**.
- b. Select an email account from the drop-down list for each field or use the tabs to find and select an agent or a queue.
- c. After you add all desired email accounts, click **OK**.

For more information, see [Reviewing the current email work item](#) on page 125.

4. Avaya Agent Web Client automatically uses the default message format in your email preferences. To change this default format, from the drop-down list, select one of the following options:

- HTML
- Plain Text

If you select HTML, the resource can include the same text formats, images, and other content that is available for HTML Email. For more information, see [Formatting email text](#) on page 131.

5. Compose the text of your email in the text area of the **New Email** tab.
6. If desired, you can do the following:
 - Insert attachments in the email work item. For more information, see [Working with attachments](#) on page 128.
 - Cancel the draft email before you send it to the recipient. To cancel the email, select **Cancel** in the Message Tab-set. After you confirm that you want to cancel, Avaya Agent Web Client removes your draft and the **New Email** tab.
7. After you complete your email, click **Send**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends your email to the recipients:

- Automatically check the email for spelling errors, and then send the email to the recipients. For information about how to spell check your reply, see [Spell checking the current email work item](#) on page 130.
- Ask you to confirm that you intend to send the email.

- Display a **Character Set Selection** dialog box, and ask you to select the language and character set to be used in the email. Select one of the languages in the following table.

Character set	Language
iso-8859-1	Western European languages, no Euro symbol. Includes English, German, French, Spanish, Italian, and Portuguese (Brazilian)
iso-8859-15	Western European languages, with Euro symbol. Includes English, German, French, Spanish, Italian, and Portuguese (Brazilian)
utf-8	Unicode Tip: Use Unicode if the email includes more than one character set.
iso-2022-jp	Japanese
euc-kr	Korean
koi8-r	Russian
windows-874	Thai
gb2312	Simplified Chinese
big5	Traditional Chinese

Handling quality assurance for an email work item

Your contact center might assign supervisors or agents to work as email approvers. An email approver reviews email responses for quality assurance before the response is sent to the customer. Quality assurance emails require prompt attention.

An email approver can take the following actions during quality assurance:

- Approve the email and send it to the customer.
- Make corrections to the email, approve the corrected version, and sent it to the customer.
- Reject the email and return it to you with a message that explains what you need to do to make the email acceptable.
- Changes the format of the email message. For example, an Approver can change the message format from Plain Text to HTML.

This section discusses the following topics:

- [Approving or rejecting an email work item](#) on page 150
- [Handling a rejected email work item](#) on page 151

Approving or rejecting an email work item

Each quality assurance email work item displays the following:

- A **Quality Assurance** icon in the work list. For a picture of the icon, see [Email work item icons](#) on page 44.
- Two tabs in the Message Tab-set. One with the original email work item from the customer, and a second with the response that needs quality assurance.

To approve or reject an email for quality assurance

1. Make the quality assurance work item the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. Read the original email work item, the response that needs quality assurance, and any attachments to those work items:

- a. Click the **Original** tab to read the original email work item from the customer.
- b. Select the message tab to read the response that needs quality assurance.

For more information, see [Reviewing the current email work item](#) on page 125.

3. Decide whether the response and the attachments meet the quality assurance guidelines of the contact center. For example, does the response:
 - Answer any questions in the original email work item?
 - Resolve any problems in the original email work item?
 - Use polite language and reasonably correct grammar and spelling?
 - Include company promotional information, if applicable?
 - Follow all guidelines and policies for interactions with customers?
 - Use the appropriate format for the message? For example, do you need to change the format from Plain Text to HTML?
4. If the response and the attachments meet quality assurance guidelines, select **Approve** to send the email to the customer.
5. If the response does not meet quality assurance guidelines, do one of the following:
 - Type a message to the agent at the top of the response that explains exactly what the agent needs to do to make the response acceptable, then select **Reject** to return the email to the agent.

- Edit the response, then select **Approve** to send the email to the customer.

After you approve or reject the email, Avaya Agent Web Client automatically releases the work item from your work list.

6. Complete the work item. For more information, see [Releasing an email work item](#) on page 156.

Handling a rejected email work item

If an email approver rejects a work item during quality assurance, the rejected work item is returned to an agent for correction. Depending on your setup, you might receive only your own rejected email work items, or you might also receive rejected email work items written by another agent.

Each rejected work item displays the following:

- A **Quality Assurance rejection** icon in the work list. For a picture of the icon, see [Email work item icons](#) on page 44.
- Two tabs in the Message Tab-set. One tab displays the original email work item from the customer. The second tab displays the response and the comments and suggestions from the approver.

Quality assurance emails require prompt attention.

To handle a rejected email work item

1. Make the email with the **Quality Assurance rejection** icon the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. If desired, select the **Original** tab to read the original email work item from the customer.
3. Select the message tab to review the response and to read the comments and suggestions from the approver on how to improve the response.
4. If desired, print the response with the comments and suggestions. For more information, see [Printing the current email work item](#) on page 130.
5. Make the requested changes to the response.
6. Remove the comments and suggestions and all other text added by the approver from the response.



CAUTION:

You must remove all approver text from the response. If you do not remove this text, it will be sent to the customer.

7. After you complete the requested changes, select **Send Again**.

Depending on your setup, Avaya Agent Web Client might do the following before it sends your response to the customer and other recipients:

- Automatically check the response for spelling errors, and then send the email to the recipients. For information about how to spell check your response, see [Spell checking the current email work item](#) on page 130.
 - Ask you to confirm that you intend to send the response.
8. Release and complete the email work item. For more information, see [Releasing an email work item](#) on page 156.

Viewing related messages

The Related Messages feature identifies email work items in your work list that share the same tracking ID with the current work item.

For example, your work list can include the original email work item, a response from the customer to a request for additional information, and a response from an external agent. All these work items share the same tracking ID. You can use the Related Messages feature to easily identify all them in your work list.

Use the Related Messages feature to identify other work items in your work list when you do the tasks in the following sections:

- [Handling a response from an external agent](#) on page 143
- [Handling a response to a request for additional information](#) on page 145
- [Handle email alerts](#) on page 145
- [Handling a rejected email work item](#) on page 151

To view related email work items

1. Make one of the email work items the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. Select **View > Related Messages**.

Avaya Agent Web Client highlights all the related email work items with the same background color.

Viewing email history

In Avaya Agent Web Client, you can search for email work items that are related to the current email work item. You can use the following items to find related work items:

- Tracking ID
- Email address

This section discusses the following topics:

- [Viewing the history of a current email work item](#) on page 153
- [Email Tracking History window](#) on page 154

Viewing the history of a current email work item

The **Email Tracking History** window displays information about all emails and work items that share a tracking ID with the current email work item. Inbound email messages received by the contact center and outbound messages created by an agent can share the same tracking ID. For example, the summary list at the top of the **Email Tracking History** window can include information about completed emails. This information can include a request for additional information or the results of quality assurance.

When you select an email in the summary list, the **Email Tracking History** window displays information about that email. The information includes the recipients, the subject line, and the content of the email. However, you cannot open any of the email work items in the summary list, or view them in the Details Tab-set.



Tip:

The **Email Tracking History** window displays information about many different types of emails, work items, and messages related to the current email work item. You can view everything that happened after the email work item entered the Avaya IC system, including the date and a description of each event.

To view the history of the current email work item:

1. If necessary, make the email work item the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. In the Email application, select **Tools > Tracking History**.
3. To see the maximum amount of information in the **Email Tracking History** window, do any of the following:
 - To see all available information in a table column, hold your cursor at the right edge of any column title. When you see a double-headed arrow, click and drag to the right.

- To see all information about emails and work items, including actions by the Avaya IC system, select **View > Full History**.

Avaya Agent Web Client displays all events that happened after the original email work item entered the Avaya IC system. A check mark displays next to **Full History** in the **View** menu. To hide the full history, select **View > Full History** and remove the check mark.

4. Select any item in the summary list to view details about that item, including recipients of the email and the content of the email.
5. To view the attachments listed in the **Attachments** field, right-click on the attachment and select **Open**.
6. To view the header fields of an email work item, select **View > Message Header**.

Avaya Agent Web Client displays the message header for the email work item in the text area above the email content. A check mark displays next to **Message Header** in the menu. To hide the message header, select **View > Message Header** again.

7. When you are finished, select **Close**.

Email Tracking History window

The **Email Tracking History** window displays information about all emails and work items that share a tracking ID with the email work item.

The following table lists the information fields for the **Email Tracking History** window:

Component	Menu option or label	Description
View menu		Allows you to customize the contents in the window. Avaya Agent Web Client displays a check mark when you select an option in this menu.
	Full History	Displays all events that happened after the original email work item entered the Avaya IC system.
	Message Header	Displays the message header for the email work item in the text area above the email content. The message header includes all routing information for an email work item.
Help menu	Email Tracking History Help	Displays this Help topic.

Component	Menu option or label	Description
Email tracking summary list	Date	Displays the date and time that the related email work item was sent or received, or the date and time that associated email processing occurred.
	Description	Displays the type of email event, including information about the sender or recipients.
Email fields	To Cc From Subject	Displays the email addresses of those who received and sent the email, and email topic.
Email text		Displays the contents of the email message. The information is for viewing only. You cannot change it.
Attachments		Displays a list of the attachments to the email message. You can open the attachments.
Close		Closes the Email Tracking History window.

Finding an email

Use the Find Email feature to find:

- Emails from a specific email address
- Email work items that share the same email tracking ID

You can use **Find Email** on the **Agent Tools** menu, **Chat Tools** menu, and **Email Tools** menu.

To find an email

1. On Agent Tools, select **Agent Tools > Find Email**.

OR

In the Chat application, select **Tools > Agent Tools > Find Email**.

OR

In the Email application, select **Tools > Agent Tools > Find Email**.

2. In the **Find Email** window, select one of the following option buttons and complete the field.
 - To review a list of email work items that were sent from a specific email address:
 1. Select **Find All Customer Email Contacts**.
 2. Enter the email address.

3. Click **Ok**.

The application displays the list in the **Customer Contacts Details** window.

- To review a list of email work items that share a specific email tracking ID:
 1. Select **Find Email Contacts with a Tracking ID**.
 2. Enter the email tracking ID.
 3. Click **Ok**.

The application displays the **Email Tracking History** window.

Using multiple languages with email work items

You might receive email work items in a language that is not your primary language. If you know the language well, you can reply in that language. Contact your administrator if the language is not displayed properly.

You can also spell check your reply in that language. For more information, see [Spell checking the current email work item](#) on page 130.

Releasing an email work item

When you have finished with an email work item, you must release the work item to end the "active" portion of the work item. Depending on your setup, you might select another work item to handle, or you might enter the wrap up phase. For more information about release and wrap up options, see [About the wrap up phase](#) on page 202.

Your contact center determines which steps you perform when you release an email work item. This section provides an overview of the steps that are usually performed. However, a contact center can customize the release procedures. Contact your supervisor if you are unsure of the procedure in your contact center, or if the following procedures do not match what you see in Avaya Agent Web Client.

This section discusses the following topics:

- [Releasing an email work item with a reason](#) on page 157
- [Releasing an email work item without a reason](#) on page 159

Releasing an email work item with a reason

You can release an email work item with a reason whether you have responded to the work item or not. The reason that you select determines how Email Management will handle this type of email work item. For example, Email Management might reply automatically to the email work item with an email template.

For example, your current email work item contains only a thank you from the customer for your help with a complex purchase. You select the Dismiss reason when you release the email work item. When you select Dismiss, Email Management automatically sends the customer an email template that thanks the customer and encourages the customer to visit again.

This section discusses the following topics:

- [Examples of reason codes](#) on page 157
- [Releasing the current email work item with a reason](#) on page 158

Examples of reason codes

Your contact center determines which release reasons are available to you. The following table describes some examples of release reasons that might be available to you in Avaya Agent Web Client:

Release reason	Example
Acknowledge	Acknowledges the email work item and automatically sends an email to the sender. For example, a customer sends an email that praises the service or product they received. You apply the Acknowledge release reason. Email Management sends the customer a copy of an email template to thank them for their email.
Dismiss	Dismisses the email work item without a message to the sender. For example, a marketing person sends an email with an offer of cheap ink supplies for the contact center. You apply the Dismiss release reason. Email Management does not respond to the email.

Release reason	Example
Rejection	Rejects the email work item and automatically sends an email to the sender For example, a person sends an email to the Support email address, but the sender is not listed as a customer. You apply the Rejection release reason. Email Management sends the person a copy of an email template to advise the person that they must purchase a product to receive support.
Camera	Identifies which product was the subject of the email and automatically sends an email to the sender about that product. For example, a customer sends an email to request information about camera prices. You apply the Camera release reason. Email Management sends a copy of an email template that describes the current specials on cameras.

Releasing the current email work item with a reason

To release the current email work item with a reason

1. If you have not already done so, make the email work item that you want to release the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. If your contact center has configured wrap up as optional, and you want to perform wrap up on this work item, select **Request Wrap Up**.
3. Do one of the following:
 - Select **Actions > Release With Reason**.
 - OR
 - On the **Email** toolbar or the Work Handling toolbar, select **Release > Release with Reason**.
4. Select a reason code from the **Release with Reason** submenu.
5. If you have a draft in progress for this email work item, Avaya Agent Web Client asks you to confirm that you want to discard the draft:
 - Select **Yes** to discard the draft and release the email work item.
 - OR
 - Select **No** to keep the draft and continue to handle the work item.
6. Depending upon the options presented, do one of the following:
 - If the contact disappears from your work lists and the **Wrap Up Selections** window does not open, select another work item from your work lists.
 - OR

- If the **Wrap Up Selections** window opens, see [Wrapping up the current work item](#) on page 205.
OR
- If you enter after contact work, perform the required tasks in the third-party application. The **Wrap Up Selections** window might display after you complete the after contact work.

Releasing an email work item without a reason

You can release an email work item without a reason whether you have responded to the work item or not. When you are finished with an email work item, select **Release** to end the "active" portion of the work item without a reason.

Note:

Check with your supervisor for the policy in your contact center about when to release a work item without a reason.

To release the current email work item without a reason

1. If you have not already done so, make the email work item that you want to release the current work item. For more information, see [Making an email work item the current work item](#) on page 125.
2. If your contact center has configured wrap up as optional, and you want to perform wrap up on this work item, select **Request Wrap Up**.
3. Do one of the following:
 - Select **Actions > Release**.
 - OR
 - On the **Email** toolbar or the Work Handling toolbar, select **Release**.
4. If you have a draft in progress for this email work item, Avaya Agent Web Client asks you to confirm that you want to discard the draft:
 - Select **Yes** to discard the draft and release the email work item.
 - OR
 - Select **No** to keep the draft and continue to handle the work item.
5. Depending upon the options presented, do one of the following:
 - If the contact disappears from your work lists and the **Wrap Up Selections** window does not open, select another work item from your work lists.
 - OR

- If the **Wrap Up Selections** window opens, see [Wrapping up the current work item](#) on page 205.
OR
- If you enter after contact work, perform the required tasks in the third-party application. The **Wrap Up Selections** window might display after you complete the after contact work.

Monitoring an Email Session (*Supervisors Only*)

If you are a supervisor, one of the most important ways that you can ensure quality is to monitor your agents' email sessions. You can only view the emails but cannot perform any other operations.

Note:

Before you can monitor an agent, you must be designated as the supervisor of at least one of the agent's workgroups.

To monitor an email session

1. To give your full attention to monitoring an email session, you can set your availability for voice, chat, and email to 0 in Avaya Agent Web Client.
2. Select the **Supervisor Tools > Begin supervisor session** option on the main toolbar of the Avaya Agent Web Client.

This displays a Supervisor pane besides the interaction list panel. In the Supervisor pane, you can view the workgroup and agents currently logged-in to the chat or email session.

3. Select an agent whose email session you want to monitor.

The **Work List** pane displays emails that the selected agent has received and working on them.

4. Select an email to monitor.

The preview of the email is displayed.

Note:

Supervisor can only view the emails that the agent has received but cannot view the actions that agent is performing on those emails.

5. To end your monitoring session without switching to another session, select the **Supervisor Tools > End supervisor session** option.

This ends your supervisory mode for monitoring and you can start in an agent mode.

Chapter 10: Using the address book

You can use the Address Book to:

- Select destinations for voice, chat, and email work items. A destination is a queue, agent, or device that can work with voice, chat, and email work items. If you are addressing a work item, you must close the Address Book before you select another work item or open another window.
- Add frequently used queues or agents to the **My Queues** and **My Agents** tabs.

Note:

The default Address Book tabs are **My Queues**, **My Agents**, **All Queues**, and **Find**. The actual tabs and the number of items displayed in each tab depend on how your administrator configured the Address Book. This section discusses the default Address Book layout only.

You can open the Address Book from the Work Management Console and the Chat and Email applications. In addition, the Address Book opens automatically if the **Toolbar Quick Find** is empty when you select an action such as **Conference**, **Transfer**, or **New Call**.

If you are working with a call, chat, or email work item, the Address Book's **My Queues**, **My Agents**, and **All Queues** tabs only list those destinations that can accept work items of the current type. This ensures that any destination you select is valid for the work item that you are addressing.

The Address Book allows you to select a destination for the **To** field and enter a text comment about the work item in the **Comment** field. In addition, for some email work items you can also select one or more destinations for the **Cc** and **Bcc** fields.

Note:

Depending on the action you selected, the **Cc** and **Bcc** fields might not be available. For example, you cannot specify destinations in these fields when you are transferring an email.

You can use your mouse and keyboard shortcuts to move between the Address Book fields. For additional shortcut keys, see [Keyboard operations](#) on page 47.

This section discusses the following topics:

- [Understanding agent status icons](#) on page 163
- [Managing the My Queues and My Agents tabs](#) on page 163
- [Selecting destinations for a work item](#) on page 165
- [Refreshing the Address Book](#) on page 167
- [Searching for a destination](#) on page 168
- [Using Toolbar Quick Find](#) on page 169

Understanding agent status icons

The **My Agents** and the **Find** tabs display icons to identify the status of an agent.

To update the status for an agent, right-click on the agent and select **Agent Status**. Avaya Agent Web Client displays one of the following icons in the **Status** column:

Agent icon	Status	Description
	Available	The agent is logged in to Avaya Agent Web Client and is available to accept work items.
	Aux Work	The agent is busy and cannot accept work items.
	Logged out	The agent is logged out of Avaya Agent Web Client and cannot accept work items.
	External Agent	The agent is an External Agent and is available to accept work items.
	Software Agent	The agent is a Software Agent and is available to accept work items.

Managing the My Queues and My Agents tabs

You can change the destinations displayed on the **My Queues** or **My Agents** tab when you are using the Address Book to select a destination, or when you open it specifically to add or delete destinations from those tabs.

For information about opening the Address Book to select a destination, see [Adding a queue or agent to a destination field](#) on page 165.

To open the Address Book specifically to manage these tabs, select:

- **Agent Tools > Manage Address Book** from the Work Management Console
- OR
- **Tools > Agent Tools > Manage Address Book** from the Chat and Email applications

If you select this option, Avaya Agent Web Client displays the Address Book with **Manage Address Book** in the window's title bar. The window displays the standard tabs but no destination, **Work**, or **Comment** fields. When you are managing these tabs, you cannot use the Address Book to add a destination to a work item, but you can leave it open while you work on an email, chat, or voice work item in another window.

Note:

The Quick Find feature is not available when you are managing your Address Book tabs.

This section discusses the following topics:

- [Adding a destination to My Queues](#) on page 164
- [Adding a destination to My Agents](#) on page 164
- [Removing a destination](#) on page 165

Adding a destination to My Queues

To add a destination to the **My Queues** tab

1. Click the **All Queues** tab or the **Find** tab.
2. Locate the queue you want to add. For details about using the **Find** tab, see [Searching for a destination](#) on page 168.
3. If necessary, use mouse or **Up arrow** and **Down arrow** keys on the keyboard to scroll to the appropriate queue.

**Tip:**

To move through the list of queues quickly, press the first letter of the queue name on your keyboard.

4. Either select the queue you want to add then select **Edit > Add to My Queues**, or right-click on the queue and select **Add to My Queues** from the pop-up menu.
5. When you are done managing your destinations, click **Close**.

Adding a destination to My Agents

To add a destination to the **My Agents** tab

1. Click the **Find** tab.
2. Search for the agent you want to add. For details, see [Searching for a destination](#) on page 168.
3. Either select the agent you want to add then select **Edit > Add to My Agents**, or right-click on the agent and select **Add to My Agents** from the pop-up menu.
4. When you are done managing your destinations, click **Close**.

Removing a destination

To remove a currently displayed destination from the **My Queues** or **My Agents** tab

1. Select the destination.
2. Select **Edit > Delete**, or right-click on the destination and select **Delete** from the pop-up menu.
3. When you are done managing your destinations, click **Close**.

Selecting destinations for a work item

This section discusses how to select queue and agent destinations in the Address Book.

Avaya Agent Web Client displays the address fields that you can complete based on the current work item. At any time, you can select destinations with the following methods:

- Use the address drop-down lists the same way you do with the **Toolbar Quick Find**. For details, see [Using Toolbar Quick Find](#) on page 169.
- Enter a destination in an address field from your keyboard.
- Select a queue from the **My Queues** or **All Queues** tabs.
- Select an agent from **My Agents** tab.
- Use the **Find** tab to search for queues or agents based on the information you provide. For details, see [Searching for a destination](#) on page 168.

This section discusses the following topics:

- [Adding a queue or agent to a destination field](#) on page 165
- [Addressing an email from the Address Book](#) on page 167

Adding a queue or agent to a destination field

The Address Book includes four tabs that you can use to find queues and agents:

- For a list of all the queues in the system, click the **All Queues** tab.
- For your favorite destinations, select the **My Queues** or **My Agents** tab. For more information, see [Managing the My Queues and My Agents tabs](#) on page 163.
- To search for a destination, select the **Find** tab. For more information, see [Searching for a destination](#) on page 168.

To add a destination to an address field

1. Click the tab for the type of destination you want to use, or search for a destination on the **Find** tab.
2. Use mouse or the **Up arrow** and **Down arrow** keys of the keyboard to scroll to the appropriate destination.



Tip:

To move through the list of destinations quickly, look at the first column on the tab and determine what information will appear in that column for the agent or queue you want to find. Then, on your keyboard, press the first character of that piece of information. The Address Book highlights the row whose first column starts with that character.

For example, if the first column in the **My Agents** tab is **Last Name** and you want to find "Harry Smith", press **S** on your keyboard to go to the first agent whose last name starts with "S". You can then use the mouse or the arrow keys to select Harry Smith.

3. To add the destination in the address field:
 - Double-click on the destination row
 - OR
 - Right-click on the destination row and select one of the following options:
 - **Add to To** for voice, chat, and email work items
 - **Add to Cc** for email work items that allow carbon copies
 - **Add to Bcc** for email work items that allow blind carbon copies

If you add the destination to the **To** field, the destination replaces any destination that you previously selected or entered in the field. For the **Cc** and **Bcc** fields, Avaya Agent Web Client appends the destination to the destinations that are already in those fields.

4. Click **OK**.

Related topics

[Selecting destinations for a work item](#) on page 165

[Addressing an email from the Address Book](#) on page 167

[Context menus](#) on page 214

Addressing an email from the Address Book

When you work with an email, the Address Book displays the **To** field, and, optionally, the **Cc** and **Bcc** fields that specify the destinations for the work item. You can add one destination to the **To** field, and multiple destinations to the **Cc** and **Bcc** fields by separating those destinations with semicolons.

Note:

Depending on the action you selected, the **Cc** and **Bcc** fields might not be available. For example, you cannot specify destinations in these fields when you are transferring an email.

To address an email from the Address Book

1. To create a new outbound email, select **File > New Email**. To work on an email work item, make that work item current and select the desired composition option such as **Reply** or **Forward**.
2. To open the Address Book from the Email application, select **Tools > Address Book** or select **Address Book** on the toolbar.

Avaya Agent Web Client displays the Address Book.

3. Select a destination for each field that you want to fill in using the Quick Find feature or by selecting it from one of the tabs. For more information, see [Using Toolbar Quick Find](#) on page 169 and [Adding a queue or agent to a destination field](#) on page 165.

Note:

If you have selected **Reply** or **Reply All**, you cannot change the recipient in the **To** field. The Email application ignores any destination you enter into this field in the Address Book.

For details about composing emails, see [Managing email work items](#) on page 122.

Refreshing the Address Book

To refresh the Address Book, select **View > Refresh**.

Because refreshing the status for all agents can take a long time, **View > Refresh** in the **My Agents** tab only refreshes the list of agent destinations.

Note:

The status for External and Software agents is always shown as Available because Avaya Agent Web Client cannot determine an accurate status for those agent types.

Searching for a destination

Use the **Find** tab to search for a queue or agent based on a particular attribute such as the queue's name or an agent's email address. After you locate the desired destination, you can add it to one of the destination fields in a work item or to the list of destinations in the **My Queues** or **My Agents** tab.

To search for a destination with the **Find** tab:

1. Select the **Find** tab.
2. In the **Find** area, select **Queues** or **Agents** from the drop-down list.
3. If you selected **Agents**, select the information you want to search for from the drop-down list. You can select one of the following items to search for:
 - **Last Name**
 - **Agent ID**
 - **Email Address**
 - **First Name**
 - **Telephone Number**
4. Enter one or more characters that you want to match in the **Starting With** field.
5. Select **Find Now**.

Avaya Agent Web Client searches the entire contact center database for agents or queues that match the specified criteria and lists any matches in the **Find Results** area. If it cannot find any matches, it displays a message in the status bar area at the bottom of the window.

Note:

If the database includes numerous destinations, then the search might take several minutes.

The results are displayed in the same format as on the **My Queues** or **My Agents** tab, depending on whether you searched for queues or agents.

6. To add the destination:
 - **To** field, double-click on the destination row or right-click on the destination row and select **Add to To**. Avaya Agent Web Client fills the selected destination into the **To** field.

Note:

You can only add one destination to the **To** field. Therefore, if you already have a destination in the **To** field, Avaya Agent Web Client replaces that destination with the one you just selected.

- **Cc** or **Bcc** fields for an email work item, right-click on the destination row and select **Add to Cc** or **Add to Bcc**. Avaya Agent Web Client adds the selected destination into the appropriate field, appending it to any previously selected destinations.
 - **My Queues** or **My Agents** tab, right-click on the destination row and select **Add to My Queues** or **Add to My Agents**, as appropriate.
7. Click **OK**.
- Avaya Agent Web Client closes the Address Book.

Related topics

[Managing the My Queues and My Agents tabs](#) on page 163

[Selecting destinations for a work item](#) on page 165

Using Toolbar Quick Find

To select a destination for a conference, transfer, consultation or new outbound call:

1. If you want to start a conference, transfer, or consultation, make the work item you want to send the current work item.
2. In the **Toolbar Quick Find**:
 - Enter a complete destination into the text box.
 - OR
 - Enter one or more numbers or letters. If these characters match one or more previously used destinations, Avaya Agent Web Client displays a list of those previous destinations. Use your mouse or keyboard **arrow** keys to move to the desired destination, and then press **Enter**.
 - OR
 - Select the **Down** arrow next to the field to open a drop-down list that shows your ten most frequently used destinations, then use your mouse or keyboard **arrow** keys to move to the desired destination. To use that destination, select **Enter**.
3. If you want to:
 - Place a new outbound call, select **New Communication > New call**.
 - Select one of the following toolbar buttons or **Actions** menu options:
 - **Conference** to create a conference for a telephone call or chat session.
 - **Transfer** to transfer a telephone call, chat session, or email to another agent, queue, or directory number.

- **Consult** to talk with another person before optionally transferring the telephone call. A consult places the customer on hold and connects you to another agent so the two of you can talk privately before the call is actually transferred. After you have consulted with the agent, the call is transferred and the work item is removed from your work list.

Note:

If the **Toolbar Quick Find** is empty, Avaya Agent Web Client displays the Address Book. For more information, see [Selecting destinations for a work item](#) on page 165.

Chapter 11: Working with resources

The Resources feature provides prepared text, Web page addresses, and emails. You can use these resources when you handle a work item. For example, a resource might include one or more of the following:

- A standard greeting or closing
- An answer to a frequently asked question
- The Web page address for an online form that customers frequently need to complete

You can reference resources for voice, chat, and email work items. For example, you can:

- Refer to resource information during a telephone conversation.
- Push a Web page address during a chat session.
- Include a text resource, email resource, or a Web page address when you compose an email.

You can use the Resources feature from the Agent Tools pane and within the Chat and Email applications.

This section discusses the following topics:

- [Resources feature](#) on page 172
- [Types and examples of resources](#) on page 175
- [Displaying the Resources feature](#) on page 179
- [Viewing resources](#) on page 180
- [Creating resources](#) on page 183
- [Editing resources](#) on page 187
- [Finding a resource](#) on page 189

Related topics

[Using resources in a voice work item](#) on page 86

[Using resources in a chat work item](#) on page 117

[Using resources in an email work item](#) on page 135

Resources feature

The Resources feature is a hierarchical tree of folders that groups resources.

You can expand and collapse a folder to display or hide the resources in that folder:

- Select the folder's plus (+) sign to expand and display the subfolders and resources.
- Select the folder's minus (-) sign to collapse the folder and hide the subfolders and resources.

This section discusses the following topics:

- [Resources components](#) on page 173
- [Moving within Resources](#) on page 174

Resources components

You can display the Resources feature in a stand-alone window or in a pane attached to the **Chat** and **Email** applications.

Avaya Agent Web Client displays the resources based on how you display the Resources feature. For example, when you select **Resources** in the Chat application, you see only the resources that apply to chat work items. You do not see any email resources, email templates, or suggested responses.

The **Manage Resources** window or pane displays the following areas:

Component	Description
Menu bar	Displays the following menus that you use to create, view, and manage resources: File , Edit , View , and Actions .
Find Resource field	Provides a text field that you can use to search for resource names. For more information, see Finding a resource on page 189.
Resources Tree	Displays one or more of the following resource folders: ● My Resources ● Global Resources ● Email Templates ● Suggested Responses For more information, see Types and examples of resources on page 175.
Resource Description	Displays a preview of the text portion of the selected resource: ● The text contents for text resource or suggested response ● The body or subject of an email resource or email template ● The Web page address for a Web page resource

Moving within Resources

You can use your mouse and keyboard shortcuts to move between the:

- Menu bar
- Find Resource field
- Resources tree
- Description areas

The following table lists the shortcuts you can use with your mouse:

Mouse operation	Description
Select a folder icon or a name	Highlights or selects the folder in the Resources tree.
Right-click on a folder or icon name	Displays the folder context menu.
Double-click on a collapsed folder icon or name	Expands or opens the folder listing the resources in the folder.
Double-click on an expanded folder	Collapses or closes the folder hiding the resources in the folder.
Select a resource	Selects the resource and displays its contents in the description field.
Right-click a folder	Displays the Resources context menu.
Double-click an entry	Does one of the following: • Inserts the resource in an email at the cursor location. • Inserts the text in a chat session at the cursor location. • Populates the relevant fields of the email resource or email template in the email message. • Inserts the Web page address in the Push field of the Chat application. • Sends the text or Web page address directly to the customer.
Right arrow	Expands the Resources tree folder.
Left arrow	Collapses or closes the Resources tree folder.
Up arrow	Selects the folder above the current folder.
Down arrow	Selects the folder below the current folder.

Related topics

[Keyboard operations](#) on page 47

[Resources feature](#) on page 172

Types and examples of resources

Avaya Agent Web Client allows you to use several types of resources. Some resources are restricted to certain types of work items.

This section discusses the following topics:

- [Types of resources](#) on page 176
- [Contents of resource folders](#) on page 178

Note:

If you handle work items for more than one tenant, the resources available in your Resources folders might be different for each tenant.

Types of resources

The following table describes the types of resources that might be available to you.

Resource type	Description	Examples
Text resource	Contains standard text for frequently typed or requested information. A text resource can be any length. You can do the following with a text resource: ● Insert the text into an email work item or chat work item. ● Reference the text when you handle a voice work item.	● Standard greeting ● Complex response to a frequently asked question
Web page resource	Contains the address of a frequently used Web page. The Web page address must begin with: ● http:// ● https:// ● www You can do the following with a Web page resource: ● Insert the Web page address in the Web page address field of the Chat application, then push the Web page address to the customer. ● Reference the Web page address when you handle a voice work item.	● Web page for an item in a shopping catalog ● Web page for an online form ● Web page for a site where the customer can download documents
Email resource	Contains standard text for frequently sent emails. An email resource can include: ● Email addresses for the To, Cc, and Bcc fields ● Subject of the email ● Part or all of the text for the body of an email message ● Attachments to add to the email	● Standard greeting ● Standard signature ● Text about policies

Resource type	Description	Examples
Email template	Contains standard text for frequently sent emails. Email templates are similar to email resources. You can use them to fill out fields in an email. An email template has the following restrictions: - You cannot change an email template. - You cannot use an email template to insert an attachment in an email. When you add an email template to a current email, Avaya Agent Web Client: - Populates the To, Cc, Bcc, and Subject fields - Inserts the text in the body of the email Your supervisor creates email templates and makes them available to you and other agents. Note: If an email template contains an attachment, Avaya Agent Web Client cannot send the email. You must use an email resource or manually add an attachment to an email work item.	- Advertisements - Collection notices - Confirmation emails - Form letters - Thank you emails
Suggested response	Contains one or more suggested responses for answers to questions in the email work item. The text in a suggested response is based on an analysis of the email work item. The percentage displayed next to a suggested response indicates the likelihood that it matches the topic of the email work item. For example, 100% is likely to match the email topic, and 10% is unlikely to match the email topic. Suggested responses are temporary resources that are specific to each email work item. They are changed for each current email work item. Depending on your setup, suggested responses might not be available to you.	- Company policies - Price quotes - Troubleshooting information

Contents of resource folders

The following table describes the folders of the **Manage Resources** window:

Resource folder	Description	Examples
My Resources	Lists all the resources that you create for your own use. These resources are not available to other agents. You cannot access resources in the My Resources folders of other agents. You can edit or delete any resource that you create.	• Email text • Prepared text • Web pages
Global Resources	Lists global resources that all agents can reference or use in a work item. Your supervisor creates global resources and makes them available. You cannot change or create global resources.	• Email addresses • Prepared text • Web pages
Email Templates	Lists the available email template resources that you can use in an email work item. Your supervisor creates email templates and makes them available. You cannot change or create email templates. If your administrator has configured selective download of templates, you can see a drop-down list with the following options: • My Templates: Only the templates that belong to your assigned workgroup will be visible. • All templates: All the templates available in your system will be visible. You can switch between My Templates and All Templates. For more information, see Email template on page 177.	• Advertisements • Collection notices • Confirmation emails • Form letters • Thank you emails
Suggested responses	Lists the available suggested responses for the current email work item. Your supervisor creates suggested responses. For more information, see Suggested response on page 177.	• Company policies • Price quotes • Troubleshooting information

Displaying the Resources feature

You can display the Resources feature in a stand-alone window or in a pane attached to the Chat and Email applications. In the Chat application, you see resources for chat work items. In the Email application, you see resources for email work items.

This section discusses the following topics:

- [Displaying the Manage Resources window](#) on page 179
- [Displaying the Resources pane](#) on page 179

Displaying the Manage Resources window

Use the **Manage Resources** window to do the following tasks:

- Create and modify resources in your **My Resources** folder.
- View resources in the **Global Resources** and **Email Templates** folders.



Tip:

Avaya Agent Web Client only displays the **Suggested Responses** folder in the **Resources** pane of the Email application. You must have a current work item and be configured for suggested responses. For more information, see [Displaying the Resources pane](#) on page 179.

To display the **Manage Resources** window:

1. Select the Agent Tools pane.
2. Select **Agent Tools > Manage Resources**.

Avaya Agent Web Client displays the **Manage Resources** window with all available resources, and disables the **Actions** menu.

Displaying the Resources pane

You can display the Resources feature in a pane that is attached to the Chat and Email applications. The Resources pane displays all available resources for the current work item in the application.

Note:

When you preview a chat or email work item, Avaya Agent Web Client displays with the Resources tree collapsed. The **Resources** pane menus and **Find Resource** field are disabled. Avaya Agent Web Client continues to accumulate time for the current work item.

To display the Resources pane from the Chat or Email application:

- On the toolbar, select **Expand Resources**.
- OR
- From the menu bar, select **View > Resources**.

Avaya Agent Web Client displays the Resources pane attached to the application window.

Related topics

[Starting the Chat application](#) on page 96

[Starting the Email application](#) on page 122

Viewing resources

Avaya Agent Web Client displays resources based on the following conditions:

- The application that you use to access the resources.
- The preferences that your supervisor sets up for each tenant.
- The options that you check in the Resources **View** menu.

You perform the same steps to view resources, whether you access the resources in the **Manage Resources** window or the Resources pane.

This section discusses the following topics:

- [Viewing available resources](#) on page 180
- [Viewing the contents of a resource](#) on page 181
- [Collapsing resource folders](#) on page 181
- [Filtering your view of resources](#) on page 182

Viewing available resources

The Resources feature groups all available resources in folders. You might need to expand these folders to view the resources that are available in a specific folder.

To view available resources in a Resources folder:

1. For each folder that contains resources you want to display, do one of the following:
 - Select the + character to the left of the folder icon.
 - OR
 - Double-click the folder name.

2. If the folder includes subfolders, repeat step 1 to see the available resources in each subfolder.
3. Select a resource to preview the contents of that resource in the **Resource Description** field below the Resource folders.

Note:

The time required to complete the Refresh Email Templates operation, performed from JavaAppBridge server in IC Manager, varies according to the number of templates configured in the system. For large number of email templates for example, more than 1000 templates, it might take 5 to 10 minutes depending on the size of the templates. During this period, the templates are not available for agents. So if an agent logs in to AAWC before this operation is complete, the templates will not be visible to the agent. The agent must close the resource window and reopen the window to view the templates after the caching operation is complete. You must perform the "Refresh Email Templates" operation during the non-peak hours.



Tip:

If you do not see a preview of the resource, select the **View** menu and ensure that there is a checkmark next to **Resource Description**. If there is no checkmark, select **Resource Description** to add a checkmark.

Viewing the contents of a resource

You can only view the contents of a global resource, email template, or suggested response. You cannot change these resources.

To view the contents of a resource:

1. If necessary, expand the folder that contains the resource.
2. Select the resource that you want to view.
3. Select **Edit > View**.

Avaya Agent Web Client displays the contents of the resource in a **View** window. Do not change any of the fields in the View window. Avaya Agent Web Client will not save any changes.

4. When you are finished, select **Close**.

Collapsing resource folders

When you collapse a resource folder, you hide all the resources in that folder.

Collapsing one resource folder

To collapse a single resource folder, do one of the following:

- Select the **+** character to the left of the folder icon.
- OR
- Double-click the folder name.

Collapsing all resource folders

To collapse all resource folders, do one of the following:

- Right-click a resource folder and select **Collapse All**.
- OR
- Select **View > Collapse All**.

Filtering your view of resources

You can configure your view of the available resources to only display or to hide resources of a particular type. For example, you can filter your view to:

- Display only resources in a specific language, such as English or Japanese
- Display resources of a specific type in all folders, such as email resources or text resources
- Hide all resources in languages that you do not need, such as German or English

You cannot filter resources for suggested responses or email templates.

**Tip:**

If you filter your view of the available resources, the Resources feature displays resources with this filter the next time that you access resources. You can maintain different filtered views in the **Manage Resources** window and in the Resources panes of the Chat and Email applications.

Filtering resources by resource type

To filter resources by resource type:

1. Select the **View** menu.
2. For each type of resource in the **View** menu:

- To display that type of resource, ensure that the menu option has a checkmark to the left of the name. If the menu option does not have a checkmark, select the option to add a checkmark.
- To hide that type of resource, ensure that the menu option does not have a checkmark to the left of the name. If the menu option has a checkmark, select the option to remove the checkmark.

Filtering resources by language

To filter resources by language:

1. Select **View > Language**.
2. For each language option in the **View** menu, do one of the following:
 - To display resources in all available languages, select all the languages.
 - To display resources in one or more specific languages, ensure that:
 - Each language that you want to display has a checkmark to the left of the name. If the language does not have a checkmark, select the language to add a checkmark.
 - To hide resources in one or more specific languages, ensure that:
 - Each language that you want to hide does not have a checkmark to the left of the name. If the language has a checkmark, select the language to remove the checkmark.

Creating resources

You can create and edit your own text resources, Web pages, and email resources.

Avaya Agent Web Client saves the resources in the **My Resources** folder.

Note:

You cannot create global resources or email templates in Avaya Agent Web Client. A supervisor must create global resources in Avaya Agent, and email templates in Mail Template Administration.

This section discusses the following topics:

- [Creating a subfolder in My Resources](#) on page 184
- [Creating a text resource](#) on page 184
- [Creating a Web page resource](#) on page 185
- [Creating an email resource](#) on page 186

Creating a subfolder in My Resources

You cannot move existing resources into a different folder. To organize resources in folders, create the folder first, and then create the resource in the new folder.

To create a subfolder in your **My Resources** folder:

1. Select the folder where you want to create the subfolder.
For example, select the **My Resources** folder or a subfolder of the **My Resources** folder.
2. Right-click the folder and select **New > Folder**.
3. In the **New Folder** window:
 - a. In the **Name** field, enter a name for the subfolder.
 - b. Click **OK**.

Creating a text resource

You can insert text resources in chat work items or email work items. You can also refer to text resources when you talk to a customer on the telephone.

To create a text resource in your **My Resources** folder:

1. Select the folder where you want to create the text resource.
For example, select the **My Resources** folder or a subfolder of the **My Resources** folder.
2. Right-click the folder and select **New > Text Resource**.
Avaya Agent Web Client opens the **New Text Resource** window.
3. In the **New Text Resource** window, complete the following fields:
 - a. In the **Name** field, enter a name for the text resource.
 - b. In the **Tenant** field, select a tenant from the drop-down list.
A tenant might be a department of your company, a site location, or a different company. Your supervisor assigns you to one or more workgroups. Each workgroup is assigned to a tenant.
 - c. In the **Language** field, select one of the following:
 - **All Languages** if you want this text resource to be available for all languages.
 - A specific language if you want this text resource to only be available for one language.
 - d. From the **Format** drop-down list, select one of the following options:
 - HTML

- Plain Text

If you select HTML, the resource can include the same text formats, images, and other content that is available for HTML Email. For more information, see [Formatting email text](#) on page 131.

- e. In the **Text** field, enter the text of your resource.
4. Click **OK**.

Avaya Agent Web Client displays the new resource in the folder.

Creating a Web page resource

You can insert Web page resources in chat work items or email work items. You can also refer to Web page resources when you talk to a customer on the telephone.

Note:

Avaya Agent Web Client does not verify a Web page address in a Web page resource. Avaya recommends that you open the Web page in your browser first to verify that the address is still valid. For more information, see [Verifying a Web page resource](#) on page 120.

To create a Web page resource in your **My Resources** folder:

1. Select the folder where you want to create the Web page resource.
For example, select the **My Resources** folder or a subfolder of the **My Resources** folder.
2. Right-click the folder and select **New > Web Page Resource**.
Avaya Agent Web Client opens the **New Web Page Resource** window.
3. In the **New Web Page Resource** window, complete the following fields:
 - a. In the **Name** field, enter a name for the Web page resource.
 - b. In the **Tenant** field, select a tenant from the drop-down list.
A tenant might be a department of your company, a site location, or a different company. Your supervisor assigns you to one or more workgroups. Each workgroup is assigned to a tenant
 - c. In the **Language** field, select one of the following:
 - **All Languages** if you want this Web page resource to be available for all languages.
 - A specific language if you want this Web page resource to only be available for one language.

- d. In the **Web** field, enter the address for the Web page.

Do not enter any text other than the address in the **Web** field.

Avaya Agent Web Client automatically enters `http://` in the **Web** field. If desired, you can delete this text and enter a Web page address that starts with `https://` or `www.` Do not enter a Web page address that starts with `ftp://`.

- e. Click **OK**.

Avaya Agent Web Client displays the new resource in the **My Resources** folder.

Creating an email resource

You can only use email resources with email work items.

You can add attachments to an email resource. When you use the email resource, Avaya Agent Web Client automatically inserts the attachments into the current email work item.

To create an email resource in your **My Resources** folder:

1. Select the folder where you want to create the email resource.

For example, select the **My Resources** folder or a subfolder of the **My Resources** folder.

2. Right-click the folder and select **New > Email Resource**.

Avaya Agent Web Client opens the **New Email Resource** window.

3. In the **New Email Resources** window, complete the following fields:

- a. In the **Name** field, enter a name for the email resource.
- b. In the **Tenant** field, select a tenant from the drop-down list.

A tenant might be a department of your company, a site location, or a different company. Your supervisor assigns you to one or more workgroups. Each workgroup is assigned to a tenant

- c. In the **Language** field, select one of the following:

- **All Languages** if you want this email resource to be available for all languages.
- A specific language if you want this email resource to only be available for one language.

4. If desired, enter email addresses in the following fields of the **New Email Resources** window:

- In the **To** field, enter an email address if you want the email to be sent to a particular destination. You can only enter one email address in this field.
- In the **Cc** field, enter one or more email addresses of those whom you want to receive a copy of all emails sent with the contents of this email resource. Separate multiple email addresses with a semicolon.

- In the **Bcc** field, enter one or more email addresses for those whom you want to receive a blind copy of all emails sent with the contents of this email resource. Separate multiple email addresses with a semicolon.

The other recipients do not see the addresses in this field.

5. If desired, add one or more attachments to the email resource:

- a. Click **Add Attachment** in the **New Email Resources** window.
- b. Navigate to the location of the attachment in the **Look In** field.

The attachment must be a file that is available in a network folder designated by your supervisor.

- c. Select the attachment.
- d. Select **Open**.

Repeat these steps for each attachment you want to include in the email resource. Avaya Agent Web Client displays the attachments in the **Attachments** list.

6. If desired, enter a subject line in the **Subject** field.
7. From the **Format** drop-down list, select one of the following options:

- HTML
- Plain Text

If you select HTML, the resource can include the same text formats, images, and other content that is available for HTML Email. For more information, see [Formatting email text](#) on page 131.

8. Enter any text you want to include in the body of the email in the text field.
9. Click **OK** in the **New Email Resource** window.

Avaya Agent Web Client displays the new resource in the **My Resources** folder.

Editing resources

You can only change resources in your **My Resources** folder and its subfolders.

This section discusses the following topics:

- [Changing a resource](#) on page 188
- [Deleting a resource](#) on page 188
- [Renaming a resource](#) on page 188
- [Changing the attachments to email resources](#) on page 189

Changing a resource

For information on how to add or delete an attachment for an email resource, see [Changing the attachments to email resources](#) on page 189.

To change a resource:

1. Select the resource that you want to change.
2. Select **Edit > Change**.
3. In the **Change Resources** window, change the contents of the desired fields for the resource.
4. Click **OK**.

Deleting a resource

To delete a resource from **My Resources** folder:

1. Select the resource that you want to delete.
2. Select **Edit > Delete**.
3. In the Agent Resource confirmation box, select one of the following:
 - **Yes** to delete the resource.
 - **No** to cancel the operation.

Renaming a resource

To rename a resource:

1. Select the resource that you want to rename.
2. Select **Edit > Rename**.

Avaya Agent Web Client changes the name into an editable field.
3. Enter the new name for the resource in the field.
4. Click away from the resource to enter the new name.

Changing the attachments to email resources

To change the attachments to an email resource:

1. Right-click the email resource and select **Change**.
2. Select an attachment in the **Attachments** list.
3. Right-click in the list to display a context menu.
4. Select one of the following options:
 - **Open** to display the contents of the attachment.
 - **Delete** to remove the selected attachment from the list.
 - **Select All** to select all the attachments. Then select **Open** or **Delete**.

Finding a resource

The Find Resource feature allows you to search through the resource names based on the text that you enter in the **Find Resource** field.

Avaya Agent Web Client searches the names of all global resources and all resources in your **My Resources** folder. Avaya Agent Web Client does not search resources that appear in the **Suggested Responses** folder.

This section discusses the following topics:

- [Searching for a resource](#) on page 189
- [Using a wild card in a search](#) on page 190

Related topics

[Collapsing resource folders](#) on page 181

[Filtering your view of resources](#) on page 182

Searching for a resource

To search for a resource:

1. In the **Find Resource** field, enter all or part of the name or text in a resource.

You can enter the entire resource name or a part of it. You can include wild characters in the text string: asterisk (*), question (?), and carat (^). For more information, see [Using a wild card in a search](#) on page 190.

2. Select **Find**.

When Avaya Agent Web Client finds a resource, it expands the tree and highlights the name in the Resources tree. **Find** changes to **Find Next**.

3. If the highlighted resource is not the one you need, select **Find Next** to continue the search.

4. If you reach the end of the search, Avaya Agent Web Client displays a message that asks if you want to continue:

- To continue the search, select **Yes**.
- To end the search, select **No**.



Tip:

After you have reviewed all the resources found by the search, you can collapse all the expanded folders. For more information, see [Collapsing resource folders](#) on page 181.

Using a wild card in a search

The following table describes the wild card characters that you can use in a search.

Wild card	Description
*	Use an asterisk to find a resource with one or many characters that are different. You can place the asterisk anywhere in the entry. For example, use *support.com if you want to find all Web page resources that include "support com" in the name.
?	Use a question mark to find a resource where one character is different. The character that changes is in the position where the question mark is placed. You can place the question mark anywhere in the entry. For example, use ?ffect to look for a text resource that includes either "effect" or "affect" in the name.
^	Use a carat to find resource names that start with the character or characters that follow the carat. Place the carat at the beginning of the search term. For example, use ^special to find resources that start with the word "special".

Chapter 12: Using the Spelling feature

In Avaya Agent Web Client, you can use the Spelling feature to find and correct spelling errors in chat and email messages. Avaya Agent Web Client also detects the words that are typed repeatedly, by mistake.

Depending on your setup, Avaya Agent Web Client might automatically check the spelling of your chat or email messages when you click **Send**. If the **Spelling** window does not displayed automatically, select **Tools > Spelling** in the Chat and Email applications to check the spelling of the current work item.

You can also add words to your custom spelling dictionary for use during the spell checking process.

Use Spelling to check the following for spelling errors:

- Text portion of a chat message
- Email messages

This section discusses the following topics:

- [Checking your spelling](#) on page 193
- [Correcting spelling errors](#) on page 193

Related topics

[Spell checking your messages](#) on page 106

[Spell checking the current email work item](#) on page 130

[Setting spelling preferences](#) on page 67

Checking your spelling

Depending on your agent preferences, Avaya Agent Web Client automatically checks your text for spelling errors. You can also check the spelling manually.

Note:

Spelling supports English and European languages. Spelling does not support Asian languages.

You can run Spelling to:

- Check each word for errors.
- Display incorrect text in the **Not in Dictionary** field.

For information on correcting spelling errors, see [Correcting spelling errors](#) on page 193.

Starting the spelling checker

To manually start the spelling checker

1. Make a chat or email work item the current work item.
2. In the Chat or Email application, select **Tools > Spelling**.

Avaya Agent Web Client displays the **Spelling** window.

Spell checking in another language

To spell check in another language

1. Select **Agent > Preferences** to open the **Agent Preferences** window.
2. Click the **Spelling** tab.
3. Select another language from the **Language** field.
4. Click **OK** to use the dictionary for the selected language.

Correcting spelling errors

Use Spelling to complete the following functions:

- Check each word for errors
- Display incorrect text in the **Not in Dictionary** field
- Depending on your setup, suggest a spelling for the word in the **Suggestions** field

- Highlight the misspelled or repeated word within the chat message or email message

This section discusses the following topics:

- [Buttons in Spelling window](#) on page 194
- [Correcting your spelling errors](#) on page 194

Buttons in Spelling window

The **Spelling** window provides the following buttons that you can use to correct spelling errors:

Button	Description
Ignore	Leaves the highlighted word in the Not In Dictionary field unchanged. Finds the next error.
Ignore All	Leaves all the occurrences of the word unchanged.
Change	Accepts the text in the Change to field and finds the next error. If the selected error is a repeated word, this button changes to Delete to remove the second instance of the word.
Change All	Accepts all occurrences of the corrected spelling and finds the next error. As it continues checking the text, Spelling changes all instances of the error that it encounters in the active composition message. Important: If you select Change All , Spelling changes each occurrence as it finds it instead of changing them all at once. Therefore, if you stop the spell checker before it finishes checking the text, some occurrences of the misspelled word may remain in the text.
Add	Adds the highlighted word to your custom dictionary. To edit your custom dictionary, see Editing your custom dictionary on page 68.
Suggest	Populates the suggestions box for each misspelled word if it is not already populated. If the suggestions box is populated, Suggest is disabled.
Undo Last	Reverses the most recent spelling check actions, one at a time, and repositions the selected region of the last spelling error. You can undo actions one by one until you reach the initial action you had taken in this session.

Correcting your spelling errors

To correct your spelling errors

1. Depending on the text, select one of the following buttons:
 - If the word is spelled correctly, select **Ignore** or **Ignore All** to resume the spell check.
 - If the **Suggestions** box is empty, select **Suggest** to see a list of potential words.

- If the word is spelled incorrectly, review the words listed in the **Suggestions** box for a word with the correct spelling. If the correct spelling is listed, select the word and select **Change** or **Change All**.



Tip:

Some words might not be in the dictionary, such as names or products. If you are sure that the word is spelled correctly, you can select **Add** to include the word in your custom dictionary.

Based on the dictionary, Avaya Agent Web Client displays the **Spelling Complete** window when the work item does not contain spelling or text errors.

2. Click **OK** to close the **Spelling Complete** window.

Chapter 13: Using the Web Self-Service database

Web Self-Service is a database of frequently asked questions (FAQ). The database contains commonly requested information about products and services that your contact center supports.

You and your customers can use Web Self-Service to research and answer the questions. You can also submit informational documents that your supervisor must approve. You can use the documents during telephone conversations, chat sessions, and in emails.

You can use Web-Self Service to:

- Push Web page addresses of documents to chat customers.
- Email the Web page addresses of relevant Web documents to customers.
- Paste the contents of the documents in your chat and email responses.
- Provide Web page addresses or quote documents to your telephone customers.
- Create resources in the **My Resources** folder that use the contents of the document.

You can display the Web Self-Service feature in the following ways:

- From Agent Tools, select **Agent Tools > Web Self-Service**.
- In the Chat and Email applications, select **Tools > Web Self-Service**.

Avaya Agent Web Client displays the **Interaction Center Web site Self-Service Administration** browser window. The left pane lists the self-service options. The right pane displays fields that you complete to view, submit, and edit the documents.

This section discusses the following topics:

- [Finding self-service documents](#) on page 197
- [Submitting self-service documents](#) on page 198
- [Editing self-service documents](#) on page 199
- [Approving or rejecting self-service documents](#) on page 199
- [Viewing DataWake history](#) on page 200

Finding self-service documents

The **Interaction Center Web site Self-Service Administration** browser window displays two panes. The left pane lists the self-service options. The right pane displays fields that you complete to search for the documents.

This section discusses the following topics:

- [Looking through topic folders](#) on page 197
- [Searching the Web Self-Service database](#) on page 197

Looking through topic folders

To look through the topic folders

1. In the left pane, select **Manage FAQ**.
Web Self-Service displays the **Manage FAQ** page.
2. In the right pane, select a tenant from the drop-down field and select **Manage FAQ**.
A tenant might be a department of your company, a site location, or a different company. Your supervisor assigns you to one or more workgroups. Each workgroup is assigned to a tenant
Web Self-Service displays a list of folders in the FAQ Database.
3. To find documents in a different language, select the language from the **Select language** drop-down field.
4. Navigate through the folder hierarchy to find the desired topic.
Folder icons identify the topics. Folders can contain other folders and documents.
Document icons identify the documents.
5. Select the name of a document to display its contents.
If the document is a Web page address, select the link beneath the topic title to display the Web page.

Searching the Web Self-Service database

To search the Web Self-Service database

1. In the left pane, select **Search FAQ**.
2. In the right pane, select a tenant from the drop-down field and select **Search FAQ**.

3. To find documents in a different language, select the language from the **Select language** drop-down field.
4. Enter a phrase or keyword in the **What are you searching for** field.
5. Click **Go**.

Web Self-Service lists the documents that contain the term you entered in the Search page.

Submitting self-service documents

You can submit informational documents that your supervisor must approve. You can use the documents during a chat session and in emails.

The **Interaction Center Web site Self-Service Administration** browser window displays two panes. The left pane lists the self-service options. The right pane displays fields that you complete to submit a document.

To submit a document

1. In the left pane, select **Manage FAQ**.
Web Self-Service displays the **Manage FAQ** page.
2. In the right pane, select a tenant from the drop-down fields.
3. Select a language from the drop-down field and select **Manage FAQ**.
Web Self-Service displays list of folders in the FAQ Database.
4. To find documents in a different language, select the language from the **Select language** drop-down field.
5. Select the topic to which you want to add a document and click **Submit**.
Web Self-Service displays the Submit a Document page.
6. Enter a title for the document in the **Document Title** field.
7. Select one of the following to identify the type of document it is:
 - Select **Internet Link** for a Web page address.
 - Select **Text** for a document.
8. Enter the document text or Web page address.



Tip:

You can use a word processing application or the Spelling feature to spell check your text. For more information, see [Using the Spelling feature](#) on page 192.

9. Click **Submit** at the bottom of the **Submit a Document** page.

Editing self-service documents

The **Interaction Center Web site Self-Service Administration** browser window displays two panes. The left pane lists the self-service options. The right pane displays fields that you complete to edit a documents that you submitted.

To edit a document

1. In the left pane, select **Manage Proposed FAQ**.
Web Self-Service displays the **Manage Proposed FAQ** page.
2. In the right pane, select a tenant from the drop-down list.
3. Select a language from the drop-down field and select **Manage Proposed FAQ**.
Web Self-Service displays a list of pending FAQ documents.
4. Select the title to view the document.
5. Make any necessary changes and select **Update**.

Approving or rejecting self-service documents

Note:

This topic is for agents who have supervisor permissions.

The **Interaction Center Web site Self-Service Administration** browser window displays two panes. The left pane lists the self-service options. The right pane displays fields that you complete to approve the informational documents.

To approve or reject a document

1. In the left pane, select **Manage Proposed FAQ**.
Web Self-Service displays the **Manage Proposed FAQ** page.
2. In the right pane, select a tenant from the drop-down list.
3. Select a language from the drop-down field and select **Manage Proposed FAQ**.
Web Self-Service displays a list of pending FAQ documents for the tenant and language.
4. Select the title to view a proposed document.
5. Read the document, and then select:
 - **Reject** - Web Self-Service discards the proposed document and does not add it to the database.
 - **Accept** - continue with this procedure.

6. To approve a document, complete the following
 - a. Enter the ASCII title for the document. This title always appears exactly as you enter it regardless of which language is selected.
 - b. Make any changes to the text.
 - c. Enter the task, email account, and routing information for the document. For more information, *Interaction Center Administration Guide*.
7. Click **Accept**.

Viewing DataWake history

You view the history of the Web pages that a customer visited on the contact center's Web site. The history is the DataWake.

A DataWake record can provide information why the customers visit the contact center Web site. A DataWake ripple is a Web page address in the DataWake record.

To view the history of Web site pages

1. In the left pane, select **DataWake View**.
Web Self-Service displays the **DataWake Summary** page.
In the right pane, complete steps **1** and **2**. You can create a search for one or more people and select a range of dates or Web site sessions.
2. In step **1** of the right pane, specify who will be in the search. You can enter the complete name or part of the name.
 - a. Enter the characters at the beginning of the customer's name.
 - b. Select **matches** or **contains**.
3. In step **2** of the right pane, select the time frame that you want to search. You can select one of the following time frames:
 - Date range: **Start Date and Time** and **End Date and Time**.
Enter the earliest and the latest time that the search can retrieve Web pages. Enter the year, month, day, and time. Web Self-Service uses the 24-hour time format. For example, 1:00 pm is 13:00.
 - Last number of sessions: **Last N Sessions**.
Enter the number of the most recent sessions that you want to review.
 - Sessions: **List of Session Ids**.
Web Self-Service returns a list of Session IDs.

4. In the **Limit wake to** field, enter a maximum number Web page addresses that you want to review.
5. Click **Display Full Data**.

Web Self-Service displays the list of Web page addresses based on the criteria you specified.

Chapter 14: Wrapping up a work item

After you release a work item, you might need to perform additional tasks related to the work item. For example, you can update another application with information about a customer order, or select wrap up codes that reflect how you handled the work item.

Your contact center determines which steps you have to perform when you release a work item. This section provides an overview of the steps that are typically performed. Contact your supervisor if you are unsure of the procedure in your contact center, or if the following procedures do not match what you see in Avaya Agent Web Client.

This section discusses the following topics:

- [About the wrap up phase](#) on page 202
- [Wrapping up the current work item](#) on page 205
- [Wrap Up Selections window](#) on page 206

About the wrap up phase

The wrap up phase is the period of time from when you release the current work item until you finish all work on the work item.

Each contact center determines what happens when you release a work item. For example, after you release a work item, you might be:

- Automatically placed in the wrap up phase after each work item.
- Allowed to choose whether you enter the wrap up phase after a work item.
- Allowed to move on to the next work item without placing into the wrap up phase.

Your contact center also determines what steps you need to perform during the wrap up phase. For example, you might be required only to select wrap up codes, or you might also be required to perform after contact work.

This section discusses the following topics:

- [About release](#) on page 203
- [About wrap up](#) on page 204
- [About after contact work](#) on page 204

About release

Release lets Avaya Agent Web Client know that you have completed the phase of a work item that involves interaction with the customer. For example, release lets Avaya Agent Web Client know that you have finished a telephone call or have sent an email reply. Avaya Agent Web Client includes the release options in the following table:

Release option	Description
Release	Available for all types of work items. Release ends the "active" portion of the work item.
Release with reason	Available only for email work items. If your contact center includes Release with reason, you select a reason from a list created by your contact center administrator. Release with reason ends the "active" portion of the work item, and can also instruct the system to take another action. For example, the reason can automatically send an email to the customer that answers the query in the work item. For more information, see Releasing an email work item with a reason on page 157.

After you release a work item:

- If you are not set up for wrap up or after contact work, Avaya Agent Web Client removes the work item from your work lists. You can then select and handle another work item in your work lists.
- If you are set up for wrap up or after contact work, Avaya Agent Web Client moves you into the wrap up phase of the work item, and displays a **Wrap Up** icon in the work list status column. For more information, see [Understanding work item icons](#) on page 27.

Note:

Depending on your setup, Avaya Agent Web Client may automatically release a voice or chat work item if the customer first hangs up the telephone or leave the chat session.

Related topics

[Releasing a voice work item](#) on page 94

[Releasing a chat work item](#) on page 101

[Releasing an email work item](#) on page 156

About wrap up

After you release a work item, you might enter wrap up. During wrap up, you select a set of wrap up codes that provides information about the work item in the **Wrap Up Selections** window. The wrap up codes that you select in the window are added to the work item information in the database.

You supervisor creates the wrap up codes that are available to you. For example, you might select a set of wrap up codes that includes:

- The reason that the customer initiated the work item
- A predetermined category that reflects the purpose of any work that you performed
- The outcome of the work item

If you received the work item from another agent, use the **History** tab of the **Wrap Up Selections** window to review wrap up codes selected by that agent.

Related topics

[Wrap Up Selections window](#) on page 206

[Wrapping up the current work item](#) on page 205

About after contact work

After contact work is the follow up work that you have to perform in a third-party application. You do not perform after contact work in Avaya Agent Web Client.

For example, when you perform after contact work, you might:

- Enter order information in order software.
- Transfer funds from one account to another in banking software.
- Print out forms or select printed material to mail to the customer.

After you finish after contact work, click **Complete** in Avaya Agent Web Client to let the system know that you are ready for another work item.

Note:

Do not click **Complete** until you finish all the work associated with the current work item.

Wrapping up the current work item

If your setup is configured for wrap up, Avaya Agent Web Client displays the **Wrap Up Selections** window after you release or transfer a work item.

If the work item was transferred from another agent, use the **Wrap Up Selections** window to review wrap up codes select by that agent. For more information, see [Using the History tab](#) on page 207.



Important:

If your contact center allows you to determine whether to wrap up a work item, you must select **Request Wrap Up** before you select **Release**.

To wrap up the current work item

1. Check if the **OK** button in the **Wrap Up Selections** dialog box is active.
If **OK** is active, you are not required to select wrap up codes before you close the **Wrap Up Selections** window.
2. If required, click the **History** tab and review wrap up codes entered previously for this work item.
3. Click the **Current** tab and do the following:
 - a. Select a category code from the **Categories** drop-down list.
 - b. Select a reason code from the **Reasons** list.
 - c. Select an outcome code from the **Outcomes** list.
 - d. To add the selected codes to the **Wrap Up Selections** list, click **Add**.

To remove a set of wrap up codes from the **Wrap Up Selections** list, select the appropriate row, and then click **Remove**.

If required, repeat Step 3 to add another set of wrap up codes.

4. Click **OK** to close the **Wrap Up Selections** window.
Avaya Agent Web Client records the wrap up codes in the database.
 5. Perform the after contact work required for this work item.
 6. Do one of the following to let the system know that you are ready to move on to another work item:
 - On the Work Handling toolbar, click **Complete**.
 - OR
 - In the Chat or Email application, select **Actions** > **Complete**.
- Avaya Agent Web Client removes the work item from your work lists.

Wrap Up Selections window

Depending on your setup, Avaya Agent Web Client displays the **Wrap Up Selections** window after you click either **Release** or **Complete**.

The **Wrap Up Selections** window has two tabs: **Current** and **History**.

This section discusses the following topics:

- [Using the Current tab](#) on page 206
- [Using the History tab](#) on page 207

Using the Current tab

Use the **Current** tab to select a set of wrap up codes. Each set of wrap up codes includes the reason for the work item, a category, and the resulting outcome.

The **Current** tab displays lists of categories, reasons, and outcomes for the current work item. Depending on your setup, the lists can vary.

The following table describes components available on the **Current** tab:

Component	Description
Categories	Lists category codes that reflect how the contact center classifies work items. For example, a contact center can classify work items by: • Channel • Sets of reasons for the work item • Types of products or services • Types of requests made by customers
Reasons	Lists reason codes that reflect the purpose of a customer's work item or the intent of the work you performed.
Outcomes	Lists outcome codes that reflect the result of your activity on the work item.
Add	Adds the set of category, reason, and outcome wrap up codes to the work item and displays them in the Wrap Up Selections list.
Wrap Up Selections	Displays the items that you have selected from the Categories , Reasons and Outcomes lists.
Remove	Removes the selected row from the Wrap Up Selections list.
OK	Records the wrap up selections and closes the window.
Help	Displays the help for the Wrap Up Selections window.

Using the History tab

Use the **History** tab to view previous wrap up codes that were entered before you received this work item. For example, you can view wrap up codes that were entered by the agent who transferred this work item to you.

The **History** tab displays a **Previous Wrap Up Selections** list box with the following columns:

- Agent
- Category
- Reason
- Outcome

Chapter 15: Shortcut keys

This chapter provides information about the shortcut keys used in Web Client.

Shortcut Key	Description
Control+C	Copies the selected text or an object.
Control+A	Select all the content.
Control+V	Pastes the copied text or an object.
Control+P	Print the email message and chat.
Control+Alt+Delete	Opens the Windows Security window.
Esc	• Cancels the current task • Closes the current menu or tree node and moves to the previous higher level For example, pressing Esc closes a drop-down menu and places the cursor on the menu that opened the drop-down menu.
Control+F4 Alt+F4	Selects the Exit option for the current window or Work Management Console.
Alt+Tab	Moves and selects the next higher level tab. For example, if you select a tab you can use Tab to select controls within it, then Alt+Tab to leave the tab and select the next one.
Control+Tab (Control+PgDn)	Moves from the current control group to the next high level control group.
Shift+Control+Tab (Control+PgUp)	Moves and selects in the reverse order than Control+Tab .
Down arrow	Moves to the next object. For example, the next: • Menu option in a menu • Entry in a list box • Character in a field • Node in a tree menu at the same level

Shortcut Key	Description
Up arrow	Moves to the previous object. For example, the previous: ● Menu option in a menu ● Entry in a list box ● Character in a field ● Node in a tree menu at the same level
Right arrow	● Opens the next lower menu for the selected menu option ● Expands the branch in the tree ● Moves to the next entry in a list ● Moves to the next character in a field
Left arrow	● Moves to the menu option that opened the current menu ● Moves to the previous item in a list ● Moves to the previous character in a field
Alt+Space	Displays a context menu for the active window in which the menu displays. Enter leaves a selected text box and completes the command that is associated with the default command key, such as OK.
Enter	Leaves a selected text box and completes the command that is associated with the default command key, such as OK.
F1	Displays the Avaya Agent Web Client Online Help system.
Shift+F1	Displays the Avaya Agent Web Client with the Help topic for the current pane.
F6	Moves between controls that are in a single group in the current window. For example, in a dialog box, F6 moves between the OK and Cancel buttons.
Ctrl+Z	Undo or cancel the previous action.
Ctrl+Y	Redo the previous action.
Ctrl+X	Cuts the selected text or an object.
Ctrl+I	Makes the selected text Italic.
Ctrl+U	Makes the selected text Underlined.
Ctrl+S	Draws a line through the middle of the selected text.
Ctrl+B	Makes the selected text Bold.
Ctrl+L	Left align a paragraph.
Ctrl+E (does not work)	Center a paragraph.

Shortcut Key	Description
Ctrl+R	Right align a paragraph.
Ctrl+J (does not work)	Justify a paragraph.
Ctrl+0 (does not work)	killword (Kill from point to the end of the current word, or if between words, to the end of the next word).
Ctrl+0 Ctrl+6	Format block.
Alt+F	File Menu for Email, Chat and Address Book.
Alt+V	View Menu for Email, Chat and Address Book.
Alt+I	Insert Menu for Email.
Alt+T	Tools Menu for Email and Chat.
Alt+A	Actions Menu for Email and Chat.
Alt+H	Help Menu for Email and Chat.
Alt+L	File Menu for Resource.
Alt+D	Edit Menu for Resource.
Alt+W	View Menu for Resource.
Alt+N	Actions Menu for Resource.
Alt+E	Edit Menu for Address Book.
Alt+V	View Menu for Address Book.
Left arrow Up arrow Enter	Close a window or menu Esc.
Enter	Complete the selected command.

Hot keys

You can use hot keys to select and open many top-row menus, such as **File**, **Edit**, **View**, and **Actions**. To open a top-row menu, press the **Alt** key and the hot key that is assigned to the menu.

The hot key letter assigned to each menu is underlined in the menu name. For example, **V** is the hot key for the **View** menu. The **V** in **View** is underlined.

To open the **View** menu, press the **Alt** and **V** keys at the same time. The hot key combination is **Alt+V**. You can press either **V** or **v**.

Note:

Because the **Resources** window is attached to both the Chat and Email application windows, the **Resources** window and the associated **Manage Resources** window have a different set of hot keys than other **View** menus. For example, in both Resources windows, the hot key for the **View** menu is **Alt+W**, not **Alt+V**.

Appendix A: Toolbars and menus

Toolbars display buttons that allow you to do the following tasks:

- Start an action.
- Display information quickly.
- Complete tasks that you do frequently.

In Avaya Agent Web Client, a toolbar consists of buttons and menus. You use toolbars to set up your work environment, and to handle and complete work items.

Some toolbar buttons display a menu of related options.

This section discusses the following topics:

- [About the toolbars](#) on page 212
- [Context menus](#) on page 214
- [Agent Status and Control](#) on page 214
- [Work handling toolbars](#) on page 215
- [Agent Tools pane](#) on page 225

About the toolbars

In Avaya Agent Web Client, the following components include toolbars:

- Work Management Console
- Chat application
- Email application
- **Customer Contacts Details** window

In each component, you select buttons and menus the same way.

This section discusses the following topics:

- [Toolbar buttons](#) on page 213
- [Toolbar menus](#) on page 213

Related topics

[Work Handling toolbar](#) on page 216

[Chat toolbar](#) on page 219

[Email toolbar](#) on page 222

[Customer Contacts Details window toolbar](#) on page 224

Toolbar buttons

Many Avaya Agent Web Client windows provide a toolbar across the top of the window. The toolbar provides a quick and convenient way to use the most common actions and functions.

When you place the cursor over a button, Avaya Agent Web Client display screen tip text in a box near the button. The screen tip identifies the name of the button.

To use a toolbar button:

1. Select a work item in the work list.
2. Select the toolbar button for the function you want to perform.

Related topics

[Keyboard operations](#) on page 47

[Work Handling toolbar](#) on page 216

[Chat toolbar](#) on page 219

[Email toolbar](#) on page 222

[Customer Contacts Details window toolbar](#) on page 224

Toolbar menus

Toolbar menus list menu options and display submenus for the task associated with the toolbar button.

Some menus provide a shortcut to the default action. These menus have a separator between the button icon and down arrow.

- To select the default menu option, select the button icon.
- To display the menu, select the down arrow on the button.

Context menus

Avaya Agent Web Client displays a context menu when you position your cursor over a list entry or tree, and right-click. A context menu is a popup menu that displays options for the selected item.

You can select a context menu option instead of the corresponding function on the toolbar or menu bar.

Agent Status and Control

The Agent Status and Control pane includes the **Agent** button and menu. This button displays in the left pane of the Work Management Console.



Use the **Agent** button and menu to do the following tasks:

- Change your working status.
- Make yourself available for channels.
- Log in to and out of channels.
- Reset a channel.
- Set your working preferences.
- Exit the application.

You can select the icon on the **Agent** button or select an option from the **Agent** menu to change your status. For example, after you log in to Avaya Agent Web Client, select **Agent** to change your status from Aux Work to Available. If you are setup to use Aux Reason codes, Avaya Agent Web Client displays a menu of Aux Reason codes.

The following table lists the Agent statuses that can display on the **Agent** button:

Agent button	Description
 Available	Waiting for work or working on work items.
 Aux Work	Doing auxiliary work or activities and cannot receive new work items. You can receive work items from other agents and handle the work items that are currently in your work list.
 Requesting Aux Work	Requesting to do auxiliary work at the first opportunity. The system displays this icon when you request to do Aux Work while you still have work items.

Work handling toolbars

Avaya Agent Web Client displays work handling buttons and menus on the Work Management Console, in the Chat application, and in the Email application. The work handling toolbars provide a quick and convenient way to use the most common actions and functions.

Avaya Agent Web Client displays the same work handling functions in various windows and menus for convenience. They offer the same functionality regardless of where you use them.

Use the Work Handling buttons to invoke work functions on the selected work item in the work list. The work handling toolbar buttons offer the following types of functions:

- Accept and release a work item
- Pause and resume handling a work item
- Collaborate with others about a work item by a conference, transfer, or consult
- Start a new voice or email communication

The Work Handling toolbar, the **Chat** toolbar and **Email** toolbar display common work handling buttons. The **Chat** and **Email** toolbars display additional buttons that are appropriate to that channel.

Avaya Agent Web Client enables and disables the work handling toolbar buttons as you select different work items from the work list. The available functions vary according to the type of work item and the work item status.

If you work on only chat work items: You might find it useful to minimize the Work Management Console and use the Chat application to work on all your the chat work items. You can restore the Work Management Console when you use the Agent Status and Control features.

If you work on only email work items: You might find it useful to minimize the Work Management Console and use the Email application to work on all your email work items. You can restore the Work Management Console when you use the Agent Status and Control features.

This section discusses the following topics:

- [Work Handling toolbar](#) on page 216
- [Chat toolbar](#) on page 219
- [Chat extended toolbar](#) on page 221
- [Email toolbar](#) on page 222
- [Customer Contacts Details window toolbar](#) on page 224

Work Handling toolbar

The Work Handling toolbar in the Work Management Console displays common buttons and menus that you use for voice, chat, and email work items.

The Work Handling toolbar in the Work Management Console is to the right of the **Agent** menu and above My Work List.

To select an option on a menu, select the down arrow on the toolbar button and select a menu option.

You can also select the button icon directly to select the default menu option.

The Work Handling toolbar looks like the following illustration:



Appendix A: Toolbars and menus

The following table identifies and describes the buttons that appear on the Work Handling toolbar:

Button	Menu option	Description
 Supervisor Tools	Begin supervisor session	Enables the supervisor to begin the monitoring session. Supervisor can monitor the chat and email sessions that the agent is handling.
	End supervisor session	Enables the supervisor to end the monitoring session.
 Accept	Accept	Allows you to accept an alerting work item. An alerting icon indicates that you have received a new work item, or a transfer, conference or consult work item from another agent.
	Decline	Declines an alerting work item and places it back in the queue for another agent. Depending on your setup, you might be allowed to decline chat or email work items.
 Release	Release	Releases the active portion of the work item. Depending upon your setup, you might enter the wrap up phase. Release hangs up the voice work item, ends the chat session, or ends the email portion of the work item. When you select Release , a similar icon appears in the Work List status column for the work item.
	Release with Reason	Releases the active portion of an email work item and allows you to select a reason for releasing the work item.
	Request Wrap Up	Requests that you enter the wrap up phase after you release the current work item.
 Complete	Complete	Marks the work item as complete and lets the system know that you are ready to handle another work item. Note: Depending on your setup, Complete might not be available.
 Resume		Makes the selected work item the current work item allowing you to actively work on it. Avaya Agent Web Client: - Resumes a telephone conversation. - Displays the Chat application with the current Web chat session. - Displays the Email application with the current email. When you select Resume , a similar icon appears in the work list status column for the work item.

Button	Menu option	Description
 Pause, On-hold, or Defer		Postpones or defers work on the work item temporarily. • Places the telephone call on hold. • Defers work on an email. When you select Pause, a similar icon displays in the work list status column for the work items. The icon blinks for voice work items. Select Pause again to take a telephone call off hold.
 Quick Find		Provides a quick destination entry field for the following features without opening Address Book: • Conference • Transfer • Consult • New Communication The Toolbar Quick Find also provides access to your most frequent destinations.
 Conference		Allows you to conference another agent or a supervisor into the current work item. When you select Conference and a destination, the Collaboration icon displays in the work list status column for the work item.
 Transfer		Transfers the selected work item to an agent, a queue, or a directory number automatically. When you select Transfer and a destination, the Collaboration icon displays in the work list status column for the work item.
 Consult		Allows you to consult with another agent or supervisor before you return to the customer or transfer the voice work item to the other person. When you select Consult and a destination, the Collaboration icon displays in the work list status column for the work item.
 Move Conversation		Alternates your conversation between the customer and the conferenced or the consulted agent.
 Cancel		Cancels the conference or transfer operation and returns you to the customer.

Button	Menu option	Description
 New Communication		Displays a menu with options to place a new telephone call and create an email.
	New Call	Allows you to create an outbound telephone call.
	New Email	Allows you to create an email.
 Customer Contacts		Displays the Customer Contacts Details window to view the recent contacts that the customer has had with the contact center. The summary list includes completed contacts and active email work items that are assigned to another agent or waiting to be assigned to an agent.
 Email Tracking History		Displays the Email Tracking History window. The window displays information about all emails and work items that share a tracking ID with the email work item.
 Touchtone Keypad		Displays a keypad allowing you to enter numeric information such as a customer's account, extension, or identification number.

Chat toolbar

The **Chat** toolbar in the Chat application displays many of same buttons that appear on the Work Handling toolbar on the Work Management Console. Several buttons on the Work Handling toolbar do not appear on the **Chat** toolbar.



Chat work items provide additional features that are not used for voice work items. For example, **Resources** does not appear on the Work Handling toolbar.

The following table identifies and describes the buttons that appear on the **Chat** toolbar:

Button	Menu option	Description
 Accept	Accept	Allows you to accept an alerting work item. An alerting icon indicates that you have received a new work item or a transfer or conference work item from another agent.
	Decline	Declines an alerting work item and places it back in the queue to be worked on later by another agent. Depending on your setup, you might be allowed to decline chat work items.
 Release	Release	Releases the active portion of the work item. Depending upon your setup, you might enter the wrap up phase. Release ends the chat session. When you select Release , a similar icon appears in the Work List status column for the work item.
	Request Wrap Up	Requests that you enter the wrap up phase after you release the current work item.
 Complete	Complete	Marks the work item as complete and removes the work item from work list. Note: Depending on your setup, Complete might not be available.
 Resume		Makes the selected work item the current work item and allows you to actively work on it. Displays the Chat application with the current Web chat session. When you select Resume , a similar icon appears in the work list status column for the work item.
 Quick Find		Provides a quick destination entry field for Conference and Transfer features without opening the Address Book. The Toolbar Quick Find also provides access to your most frequent destinations.
 Conference		Allows you to conference another agent or a supervisor into the current work item. When you select Conference and a destination, the Collaboration icon displays in the work list status column for the work item.
 Transfer		Transfers the selected work item to an agent or a queue. When you select Transfer and a destination, the Collaboration icon displays in the work list status column for the work item.

Button	Menu option	Description
 Cancel		Cancels the conference or transfer operation and returns you to the customer.
 Customer Contacts		Displays the Customer Contacts Details window to view the recent contacts that the customer has had with the contact center. The summary list includes completed contacts and active email work items that are assigned to another agent or waiting to be assigned to an agent.
 Expand Resources		Displays the Resources pane. Displays previously prepared sets of text resources and Web page resources. You can insert and use a resource during a chat session.
 Collapse Resources		Closes the Resources pane.

Chat extended toolbar

The **Chat** extended toolbar in the Chat application displays buttons for handling chat work items.



Chat work items provide additional features that are not used for voice work items. For example, **Resources** does not appear on the Work Handling toolbar.

The following table identifies and describes the buttons that appear on the **Chat** toolbar:

Button	Menu option	Description
	Make Supervisor Visible/Invisible	Allows the supervisor to make themselves visible or invisible while monitoring the chat session.
	Set Join-us handle	Allows the agent to add additional party in the conference. A new handle is generated automatically for the new party.

Button	Menu option	Description
	Set autosync on/off	Allows the agent to make themselves synchronize with the customer with whom they are interacting.
	Initiate PSTN callback	Allows the agent to initiate the PSTN call to the customer on the number displayed in the Call on this number field.
	Initiate VoIP callback	Allows the agent initiate the VOIP call to the customer.

Email toolbar

The **Email** toolbar in the Email application displays many of same buttons that appear on the Work Handling toolbar on the Work Management Console. Several buttons on the Work Handling toolbar do not appear on the **Email** toolbar.



Email work items provide additional features that are not used for voice work items. For example, **Resources** does not appear on the Work Handling toolbar.

The following table identifies and describes the buttons that appear on the **Email** toolbar:

Button	Menu option	Description
 Accept	Accept	Allows you to accept an alerting work item. An alerting icon indicates that you have received a new work item or a transfer work item from another agent.
	Decline	Declines an alerting work item and places it back in the queue to be worked on later by another agent. Depending on your setup, you might be allowed to decline email work items.
 Release	Release	Releases the active portion of a work item. Depending upon your setup, you might enter the wrap up phase. Release ends the email portion of the work item. When you select Release , a similar icon appears in the Work List status column for the work item.

Button	Menu option	Description
	Release with Reason	Releases the active portion of an email work item and allows you to select a reason for releasing the work item. Depending upon your setup, you might enter the wrap up phase.
	Request Wrap Up	Requests that you enter the wrap up phase after you release the current work item.
 Complete	Complete	Marks the work item as complete and lets the system know you are ready to handle another work item. Note: Depending on your setup, Complete might not be available.
 Resume		Makes the selected work item the current work item and allows you to actively work on it. Displays the Email application with the current email. When you select Resume , a similar icon appears in the work list status column for the work item.
 Pause or Defer		Defers work on an email. When you select Pause , a similar icon displays in the work list status column for the work items.
 Reply		Displays the Reply tab for the current email and addresses the email to the sender.
 Reply All		Displays the Reply All tab for the current email and addresses the email to the sender and recipients.
 Forward		Displays the Forward tab for the current email. You address the email.
 Forward to External Agent		Displays Forward to External Agent tab for the current email. You can address the email to an agent outside the contact center.
 Address Book		Displays the Address Book window in an email addressing mode. You can select an address for the To , Cc , and Bcc fields in the email.

Button	Menu option	Description
 Add Attachment		Allows you to attach one or more files to the email.
 Quick Find		Provides a quick destination entry field for Transfer feature without opening the Address Book. The Toolbar Quick Find also provides access to your most frequent destinations.
 Transfer		Transfers the selected work item to an agent or a queue. When you select Transfer and a destination, the Collaboration icon displays in the work list status column for the work item.
 Email Tracking History		Displays the Email Tracking History window. The window displays information about all emails and work items that share a tracking ID with the email work item.
 Customer Contacts		Displays the Customer Contacts Details window to view the recent contacts that the customer has had with the contact center. The summary list includes completed contacts and active email work items that are assigned to another agent or waiting to be assigned to an agent.
 Expand Resources		Displays the Resources pane. Displays previously prepared sets of email resources, email templates, and content analysis suggested responses. You can insert and use a resource in an email.
 Collapse Resources		Closes the Resources pane.

Customer Contacts Details window toolbar

Use the **Customer Contacts Details** window to view the recent contacts that the customer has had with the contact center. The summary list includes completed contacts and active email work items that are assigned to another agent or waiting to be assigned to an agent.

The **Customer Contacts Details** window displays a toolbar with three buttons.



The following table identifies and describes the buttons that appear on the **Customer Contacts Details** toolbar:

Button	Description
 Filter	Sets a filter for the summary list in the Customer Contacts Details window. Displays a list of criteria you can use to change the number of contacts in the summary list.
 Email Tracking History	Displays the Email Tracking History window. The window displays information about all emails and work items that share a tracking ID with the email work item.
 Help	Displays the Help topic for the Customer Contacts Details window.

Agent Tools pane

Agent Tools is a toolbar with three menus. This toolbar appears in the Work Management Console in the upper-right pane.

The Agent Tools buttons are always available.



Use Agent Tools to display the Avaya Agent Web Client supporting applications, third-party applications and Web sites, and the online Help system.

The following table identifies and describes the buttons on Agent Tools:

Button	Menu option	Description
 Agent Tools		Displays a menu with options to display tools such as: • Address Book • Resources • Chat application • Email application • Web Self-Service
	Manage Address Book	Displays the Manage Address Book window allowing you to manage your favorite agents and queues on the My Queues and My Agents tabs.
	Manage Resources	Displays the Manage Resources window allowing you to manage your favorite resources in the My Resources folder.
	Chat Application	Displays the Chat application and gives it focus.
	Email Application	Displays the Email application and gives it focus.
	Find Email	Displays the Find Email window which allows you to find the following types of emails: • emails from a specific email address • email work items that share the same email tracking ID
	Web Self-Service	Displays the database of frequently asked questions and answers (FAQ) that is set up on a customer's Website. Select Web Self-Service to answer customer questions or to submit possible FAQ topics.
 Shortcuts		Your setup might display a menu with options to display Web sites, browser pages, and installed applications.
 Help		Displays a menu with options to display the Avaya Agent Web Client online help system.
	Avaya Agent Web Client Help	Displays the Avaya Agent Web Client help system in a browser window.

Button	Menu option	Description
	Voice Help	Displays the first Help topic for the voice channel in the right pane.
	Chat Help	Displays first Help topic for the Chat application in the right pane.
	Email Help	Displays the first Help topic for the Email application in the right pane.
	About Avaya Agent Web Client	Displays information about Avaya Agent Web Client.

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