



# **Avaya one-X<sup>®</sup> Agent Quick Reference**

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# Chapter 1: Call handling

This section addresses the most common procedures for taking calls. Your contact center might be configured to use different procedures.

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## Answering calls

### Procedure

1. To answer a call:
    - If the **Auto-Answer** option is in effect, wait for the confirmation tone.
    - If the **Auto-Answer** or **Auto Accept** option is not in effect, click **Call Answer** in the voice interaction to answer the call manually.
  2. If Agent Greeting is in use, wait for Agent Greeting to finish playing.
  3. Speak into the headset, microphone, or handset.
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## Making calls

### Procedure

1. To dial from the text entry field, perform the following steps:
  - a. On the action bar, click the **Work Options** list menu and select **New Call**.
  - b. In the **Text Input** field, enter the phone number, valid deskphone number, agent number, or extension number.
  - c. Click **Initiate Call** next to the **Text Input** field to start a new call.
2. To call a number from the contact list:
  - a. On the action bar, click **Contact List**
  - b. Scroll to the contact and select **Click to Call** to start a new call.
3. To make a call from Contact Log:
  - a. On the action bar, click **Work Log**.

- b. Scroll to the contact log record and select the **Click to Call** to begin a new call.
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## Holding and reconnecting

### Procedure

Perform one of the following steps:

- To put a call on hold, click **Hold Call**.

**\* Note:**

If autohold is in effect, the system puts the current call on hold automatically when you answer another call.

- To return to a call on hold, click **Unhold Call**.
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## Muting and unmuting your workstation

### Procedure

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

- To mute a call, on the top bar, click **Mute Phone**.
  - To disengage mute, on the top bar, click **Unmute Phone**.
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## Transferring calls

### Procedure

1. During an active call, perform one of the following options:

- Click **Call Transfer > Supervisor** to transfer the call to the supervisor.
- Click **Call Transfer > Speed Dial > <Contact Name>** to transfer the call to a contact in the Speed Dial list.

- Click **Call Transfer > Contacts** and select a contact from the contact list window to transfer the call to a contact in the list.
- Click **Call Transfer > Enter value**, and enter deskphone number in the text entry field to transfer the call to an agent.

If **Direct Transfer** is in effect, the system transfers the call to the selected contact directly. The transfer ends.

2. If **Consultive Transfer** is in effect, wait for the remote to answer the call and announce the call transfer.
3. If the third party agrees to accept the impending call, click **Call Answer**. The system transfers the call to the selected contact.

## Conferencing callers

### Procedure

1. During an active call, perform one of the following options:
  - Click **Conference > Supervisor** to conference the call with the supervisor.
  - Click **Conference > Speed Dial > <Contact Name>** to conference the call with a contact listed in the SpeedDial list.
  - Click **Conference > Contact List** and select a contact from the Contact List window to add the contact to the conference.
  - Click **Conference > Text entry field** and enter the deskphone or an extension number in the **Text Input** field to conference the call.
  - If two or more calls are in progress, drag the call and drop it in to the other to conference the callers.

If **Direct Conference** is in effect, the system adds the contact to the conference directly.

If **Consultive Conference** is in effect, wait for the third party to answer the call and announce the conference.

The system puts the first party's call on hold and dials and creates a new call in the work item. If the third party agrees to accept the call, click **Call Forward**.

2. To end the conference call, perform one of the following steps:
  - To drop the last added participant from the conference call, click **Drop Participant** for the participant.

- To close the conference call, click **End Conference** in the work item.
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## Starting video calls

### Procedure

1. During an active call, click **Video Call** to start a video call.  
The system automatically converts a call into a video call if the station supports video.
  2. Use one of the following options during the video call:
    - Click **Mute Video** to block your video broadcast.
    - Click **Unmute Video** to unblock your video broadcast.
    - Click **Acquire remote camera** to acquire the remote camera.
    - Click **Call End** to release the remote camera.
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## Playing an agent greeting manually

### Procedure

1. When the system recognizes an incoming call, click **Call Answer**.
  2. On the top bar, click **Agent Greetings** and select the agent greetings recording for the incoming call.  
The system starts the agent greeting first and then transfers the voice control to you. You can click the **Bypass Agent Greetings** icon to bypass or stop the greeting playback.
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## Ending a call

### Procedure

To end a call, perform one of the following actions:

- Click **Call End** in the voice interaction.
- Hang up the handset, if used.

**\* Note:**

For calls on hold, you must reconnect to the call before ending the call.

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## Sending instant messages

### Procedure

1. To send instant messages using the **Text Input** field, perform the following steps:
    - a. Click the **Work Options** list next to the text entry field and click **New IM**.
    - b. Type the recipient's IM user ID and domain in the following manner in the **Text Input** field:  
<IM user ID>@<Domain name>
    - c. Press `Enter` or click **Initiate IM**.
  2. To send instant messages to a contact from your contact list, click **Initiate IM** corresponding to the contact name in the Contact List window.
  3. To send instant messages to a contact from your work log, expand the work log entry and click **Initiate IM** corresponding to the work log entry in the Work Log window.
  4. To start IM interaction on a voice call, click **Add IM to workitem** of the relevant work item on the Work List window.
  5. Type your messages in the IM window and click **Send** or press `Enter`.
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## Ending an IM interaction

### Procedure

Click **End IM** on the corresponding IM interaction.

If you require more time to complete the work, click the **Follow-up > Extend Follow-up**. After you complete the work, click **Complete Follow-up** either on the IM window or on the Work List window.

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## Answering a TTY call

### Procedure

1. On the incoming call work item, click the corresponding **Start TTY**.  
The system accepts the TTY call and shifts the focus to the TTY window.
  2. Begin typing your messages at the green prompt on the TTY window.  
Ensure that you end your message string with the abbreviation GA.
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## Ending a TTY call

### Procedure

To end a TTY call, click **End TTY** corresponding to the TTY interaction on the TTY window, or on the Work List window.

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# Chapter 2: Common tasks and help

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## Registering with Communication Manager

### Procedure

1. Open the **Avaya one-X Agent** program.  
The system displays the Welcome window.
2. Click **OK**.
3. On the Login dialog box, perform the following steps:
  - a. In the **Extension** field, enter the extension number.
  - b. In the **Password** field, enter the password.
  - c. To change the settings for your extension, password, save configuration, server address, deskphone extension, and IP telephone address, as needed, and click **Change Settings**.

 **Note:**

If your administrator has configured the Communication Manager feature on the extension, select the **CM Auto Answer Support Required** option to log in with the **Auto Answer** option.

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## Logging in as an agent

### Procedure

1. On the top bar, click **Agent Status > Log In**.  
The system displays the Agent Login window after logging in to the station.
2. Enter the Agent ID and password in the fields.

**\* Note:**

If you have a deskphone, the deskphone rings. Answer the call immediately. If you do not answer the call or if you enter an incorrect number, you must log in again. You are now ready to answer or make calls.

3. Click **Log In**.
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## Logging out as an agent

### Procedure

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

**\* Note:**

If you try to log out while on an active call, the system logs you out from the ACD service only after you complete the call. You can log back in anytime by clicking the agent login.

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## Connecting to Presence Services

### About this task

To log in using this procedure, you must configure the Presence Server IP Address and domain in the **IM** tab or else the log in fails.

### Procedure

1. Select **System Options > Presence Server Connect**.
  2. On the Connect to IM Server window, perform the following steps:
    - a. In the **User Name** field, enter your Presence Services user name.
    - b. Enter your Presence Services password in the **Password** field.
    - c. Enter the Presence Services domain name in the **Domain** field.
  3. Click **Log in**.
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## Disconnecting Presence Services

### Procedure

Select **System Options > Presence Server Disconnect**.

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## Changing the agent state

### Procedure

On the top bar, perform one of the following actions:

- If you are ready for ACD calls, click **Agent Status > Ready**.
  - If you are servicing the previous call, on the top bar, click **Agent Status > After Call Work**.
  - If you are not ready for ACD calls, click **Agent Status > Auxiliary** and select the appropriate reason code from the list.
  - To logout from the ACD, click **Agent Status > Log Out**.
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## Changing the answer settings

### Procedure

Use any of the following options:

- To change the answer setting to Manual-Accept, in the Work List window, click **Work List > Manual-Accept**.
- To change the answer setting to Auto-Accept, in the Work List window, click **Work List > Auto-Accept**.

**\* Note:**

Before you change the answer setting to Auto-Accept, ensure that you are using a headset in the My computer mode, or your deskphone is in the off-hook state in the Desk Phone or Another Telephone mode.

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## Completing the work in the follow-up work mode

### Procedure

1. On an active call, in the Work List window, click **Change Work Completion > Follow-up**.
2. Wait for the caller to hang up the deskphone.  
The system starts the follow-up timer for the associated work item.
3. Complete the work for the associated work item.
4. If you finish the task before the timer expires, click **Complete Follow-up**.  
If you require more time to complete the work, click the **Follow-up > Extend Follow-up** icon. After you complete the work, click **Complete Follow-up**.

**\* Note:**

Follow-up is equivalent to After Call Work.

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## Accessing your voice mails

### Procedure

1. When a new voice message arrives, the system changes the message-waiting lamp to green with an icon on the upper left corner of the top bar.
2. Click **Unread Messages**.

**\* Note:**

The Voice Mail service is available only for registered extensions with a voice mail system.

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## Getting help

### Procedure

Perform any of the following actions to gain access to help:

- Move the mouse pointer over the icons and other interface elements to display tooltips.
- Press F1 or click **System Options** > **Help** to view the Avaya one-X® Agent online help.
- On any dialog box, click **Help**.

For procedures about using the Avaya one-X® Agent features, see *Using Avaya one-X® Agent*.

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# Chapter 3: Supervisor features

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## Observing agent service

### Before you begin

You can observe only those agents listed in your contact list.

### Procedure

1. Click **Contact List** to open the Contact List window.
  2. Click **Service Observing** against the agent name.  
The system displays the **Service Observe** menu.
  3. Click **Observe Agent** on the Service Observe menu.  
The system loads the Service Observing work item on the Work List window.
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## Sending a quick alert

### Procedure

1. On the action bar, click **Contact List**.  
The system displays the Contacts window.
  2. Perform any of the following steps to send a quick alert.
    - To send a quick alert to a group, click **Quick Alert** in front of the group name in your contact list.
    - To send a quick alert to an agent, click **Quick Alert** in front of the agent name in your contact list.
    - If you are service observing an agent, click **Quick Alert** in the work item you are observing.
  3. Enter the quick alert text on the Quick Alert window and click **Send**.
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## Barging into a call

### Procedure

1. Start Service Observing for the agent to observe.
  2. Click **Barge In** to enter the active call.  
You can talk to the agent and the customer on the active call.
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## Performing a call transfer

### About this task

Use the following procedure to transfer an active call to the desktop of the supervisor. After the agent drops the call, Avaya one-X<sup>®</sup> Agent displays the call as a normal work item on the desktop of the supervisor.

### Procedure

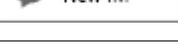
1. During an agent-customer interaction, click **Barge In** on a Service Observing session.
  2. Tell the agent to click **Call End**.  
The call between the agent and the customer on the computer of agent's interface ends. The system transfers the call to the desktop of the supervisor as a normal work item.
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# Chapter 4: Reference tables

## Media icon descriptions

Icon	Name
	<b>Start Avaya one-X<sup>®</sup> Agent</b>
	<b>No Messages</b>
	<b>Unread Messages</b>
	<b>Agent Greetings</b>
	<b>Stop Agent Greetings Bypass Agent Greetings</b>
	<b>Mute Phone</b>
	<b>Unmute Phone</b>
	<b>Audio Monitor</b>
	<b>System Options</b>
	<b>Help icon</b>
	<b>Manual-Accept</b>
	<b>Auto-Accept</b>
	<b>Alerting</b>
	<b>Working</b>
	<b>Follow-up</b>

Icon	Name
	Complete Follow-up
	Extend Follow-up
	Add New Call
	Conference
	Add IM to workitem
	Work Code
	WorkItem Details
	Incoming Call
	Outgoing Call
	Call Hold Hold Call
	Video Call Interaction
	Conference Call
	IM request
	TTY Call
	Accept Desktop Share
	Call Answer Unhold Call Call Forward
	Call Hold
	Call Transfer
	End Call
	Start Video Call Unmute Video
	Acquire remote camera

Icon	Name
	<b>Mute Video</b>
	<b>End Video</b>
	<b>Initiate IM</b>
	<b>End IM</b>
	<b>Start TTY</b>
	<b>End TTY</b>
	<b>Listen In</b>
	<b>Barge In</b>
	<b>Service Observing</b>
	<b>Quick Alert</b>
	<b>Coach</b>
	<b>New Work menu</b> <b>Work Options list</b>
	<b>New Call</b>
	<b>New IM</b>
	<b>Search</b>
	<b>Start Call</b>
	<b>Click to Call</b>
	<b>Conference</b>
	<b>Initiate IM</b>
	<b>Transfer</b>
	<b>Contact List</b>

Icon	Name
	<b>Dial Pad</b>
	<b>Work Log</b>
	<b>VuStats</b>
	<b>Launch External Applications</b>

## Shortcut keys for Avaya one-X<sup>®</sup> Agent

Use these shortcut keys as directed at the appropriate location on the Avaya one-X<sup>®</sup> Agent UI.

Shortcut keys to be used on	Shortcut key	Description
<b>Action Bar</b>	Alt+L	Toggles Contact List window.
	Ctrl+D	Toggles the Dialpad window.
	Alt+W	Toggles the Work Log window.
	Ctrl+S	Toggles the VuStats window.
	Alt+A	Opens the <b>Launch Application</b> menu.
	Alt+C	Starts a new call.
	Alt+I	Starts a new IM interaction.
	Alt+S	Opens the search window.
<b>Top Bar</b>	Ctrl+M	Opens voice mail.
	Alt+G	Opens the agent menu, such as, Ready, Auxiliary, Idle.
	Ctrl+Insert	Opens the Agent Login dialog box.
	Ctrl+Del	Logs out the agent. This key is applicable with no custom logout reason codes.

Shortcut keys to be used on	Shortcut key	Description
	Ctrl+Y	Changes the agent state to Ready.
	Ctrl+X	Changes the agent state to Aux. This key is applicable with no custom Aux. reason codes.
	Alt+P	Opens the agent greeting menu.
	Ctrl+U	Changes between mute and unmute.
	Ctrl+O	Opens the <b>Audio</b> panel.
	Alt+N	Opens the <b>System Options</b> menu.
	Ctrl+P	Opens the Agent Preferences window.
	Ctrl+T	Opens the System Settings window.
	Ctrl+Shift+S	Changes between station connect and disconnect.
	Ctrl+Shift+P	Changes between Presence server connect and disconnect.
Contact List window	Ctrl+Shift+C	Opens the Advanced Search window for the contact list.
	Ctrl+Shift+A	Opens the Contact Details window to add a new contact.
	Insert	Opens the Contact Details window to edit the contact.
	Delete	Deletes the selected contact from the contact list.
Work Log window	Ctrl+Shift+W	Opens the Advanced Search window for work log.
	Delete (while you have selected a work log)	Deletes a work log.
	Page up	Displays the previous page.

Shortcut keys to be used on	Shortcut key	Description
	Page down	Displays the subsequent page
Work List window	Alt+1 through 9	Shifts focus between work items if you have multiple active calls in the Work List window.
	A	Answers the call while the focus is on voice interaction.
	R	Releases the call while the focus is on voice interaction.
	H	Holds or unholds the call while the focus is on voice interaction.
	T (open menu)	Transfers the call while the focus is on voice interaction.
	C (open parent WI menu)	Conferences the call while the focus is on voice interaction.
	I	Opens IM window while the focus is on IM interaction.
	Y	Opens the TTY window while the focus is on voice interaction.
	A	Adds a call to the work item while the focus is on the work item.
	I	Adds IM interaction to the work item while the focus is on the work item.
	R	Invokes Reason Codes while the focus is on the work item.
	D	Displays the work item details while the focus is on the work item.
While in IM interaction	I	Invokes the IM window.
	R	Invokes the Reason Codes window.

Shortcut keys to be used on	Shortcut key	Description
	D	Displays the Work Item details on the Work List window.
Dialpad window	Ctrl+F	Displays the Favorite Buttons window.
IM Window	Alt+R	Invokes the saved responses on the IM window
All list windows	Alt+F6, Shift+Alt+F6	Alternates between two consecutive pages of the window.
TTY Window	Ctrl+Shift+Y	Closes the TTY window.
	Ctrl+Shift+H	Changes between Hold and Unhold states of the TTY call.
	Ctrl+Shift+T	Opens menu to transfer the call.
	Ctrl+Shift+R	Releases the call.
	Alt+Shift+A	Opens the <b>Abbreviation</b> menu.
	Alt+Shift+O	Opens the <b>Options</b> menu of the TTY window.

