Using Avaya IP Deskphone 9608, 9608G, 9611G, 9621G, and 9641G H.323 in the Call Center

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- Reorient or relocate the receiving antenna.
- Increase the separation between the equipment and receiver.
- Connect the equipment into an outlet on a circuit different from that to which the receiver is connected.
- Consult the dealer or an experienced radio/TV technician for help.

This device complies with Part 15 of the FCC Rules. Operation is subject to the following two conditions: (1) This device may not cause harmful interference, and (2) this device must accept any interference received, including interference that may cause undesired operation.

FCC Caution: Any changes or modifications not expressly approved by the party responsible for compliance could void the user's authority to operate this equipment.

FCC/Industry Canada Radiation Exposure Statement

This device complies with the FCC's and Industry Canada's RF radiation exposure limits set forth for the general population (uncontrolled environment) and must not be co-located or operated in conjunction with any other antenna or transmitter.

Warning

The handset receiver contains magnetic devices that can attract small metallic objects. Care should be taken to avoid personal injury.

Power over Ethernet (PoE) warning

This equipment must be connected to PoE networks without routing to the outside plant.

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Chapter 1: Introduction

Purpose

This document describes how to use product features and capabilities.

Intended audience

This document is intended for people who want to learn how to use product features and capabilities.

Related resources

Documentation

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

Document number	Title	Use this document to:	Audience
Implementing			
16–603603	*Installing and maintaining Avaya IP Deskphone 9608, 9608G, 9611G, 9621G, and 9641G H.323*	Refer to tasks related to installing and upgrading the deskphone.	Administrators
Using			
16–603594	*Using Avaya IP Deskphone 9621G and 9641G H.323*	Refer to tasks related to using the deskphone.	End users and administrators
16-603593	*Using Avaya IP Deskphone 9608 and 9611G H.323*	Refer to tasks related to using the deskphone.	End users and administrators

16-603613	*Using Avaya IP Deskphone 9608, 9611G, 9621G, and 9641G in the Call Center H.323*	Refer to tasks related to using the deskphone in a call center.	Call center agents
Administering			
16-300698	*Administering Avaya IP Deskphone 9608, 9608G, 9611G, 9621G, and 9641G H. 323*	Refer to performing administrative tasks related to the deskphone.	Administrators

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Chapter 2: Setting up the deskphones

Introduction to the Avaya Call Center agent deskphones

The 9608, 9608G, 9611G, 9621G, and 9641G are multiline deskphones that you can use in a standard office environment or with Avaya Call Center 3.0 or later releases. The 9621G and 9641G deskphones are touch-based phones with a color display. The 9611G, 9608, and 9608G are button-based phones. The 9611G has a color display, while the 9608 has a monochrome display.

You can connect a dual headset adapter to the 9641G, 9608, and 9611G models so that two persons can listen in on calls. You can attach up to three button modules to these models to extend call appearances or features or both.

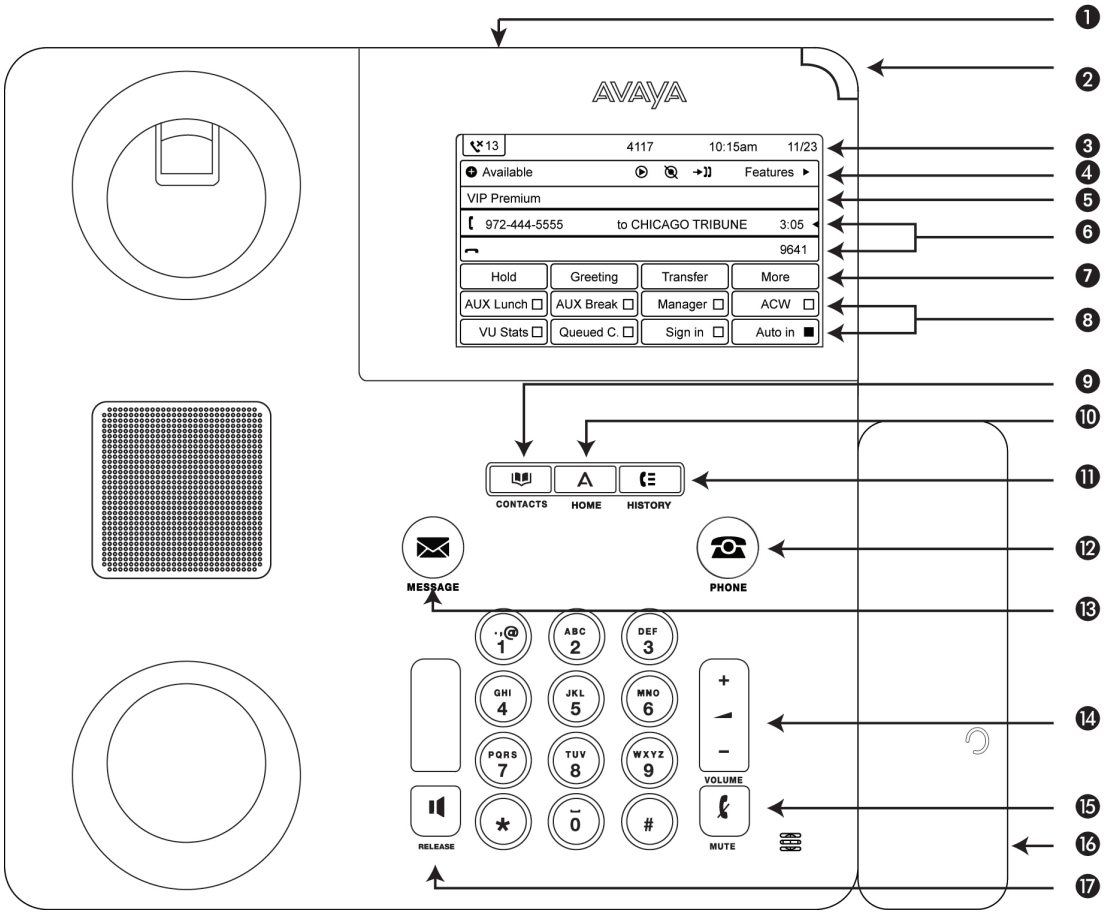
Additionally, the 9641G deskphone has an optional faceplate designed specifically for using this model in a call center. With these deskphones you can obtain convenient features and capabilities at your fingertips, including a Phone Screen to view and manage your calls, and icons indicating agent status, call states, feature status, queued calls, and missed calls. Using the designated feature buttons, you can change your agent work mode or state with one touch.

Not all functions and features described in this user guide may be available on your deskphone or applicable to the way your call center operates. If you find that a function or feature is not available, contact your supervisor or administrator.

Important:

Specific user guides address standard office deskphone operation and features such as placing calls, reviewing call history, conference calling, and modifying deskphone options and settings for your personal preferences. Depending on which deskphone model you are using, see *Using Avaya IP Deskphone 9608 and 9611G H.323* or the *Using Avaya IP Deskphone 9621G and 9641G H.323*, available on the Avaya Support Site:http://avaya.support.com.

9621G and 9641G buttons and features



Note:

The 9641G model includes a call center faceplate and a dual headset adapter replacing the handset as the only voice option.

Callout No.	Name	Description
1	USB Port	If administered, you can insert a USB device, thumb drive, or flash drive to transfer contacts between your phone and an external data source. You can also recharge some battery-powered devices by using a USB cable to connect the device to USB port of your deskphone. Note: The 9621G does not have a USB port.
2	Message Waiting Indicator	An illuminated red light in the upper-right corner of your phone indicates you have messages waiting. This light flashes when you receive an incoming call. If Visual Alerting is enabled, this light flashes when you receive an incoming call. In addition to the Message Waiting Indicator, the **Message** button is also illuminated when you have voice mail messages waiting.

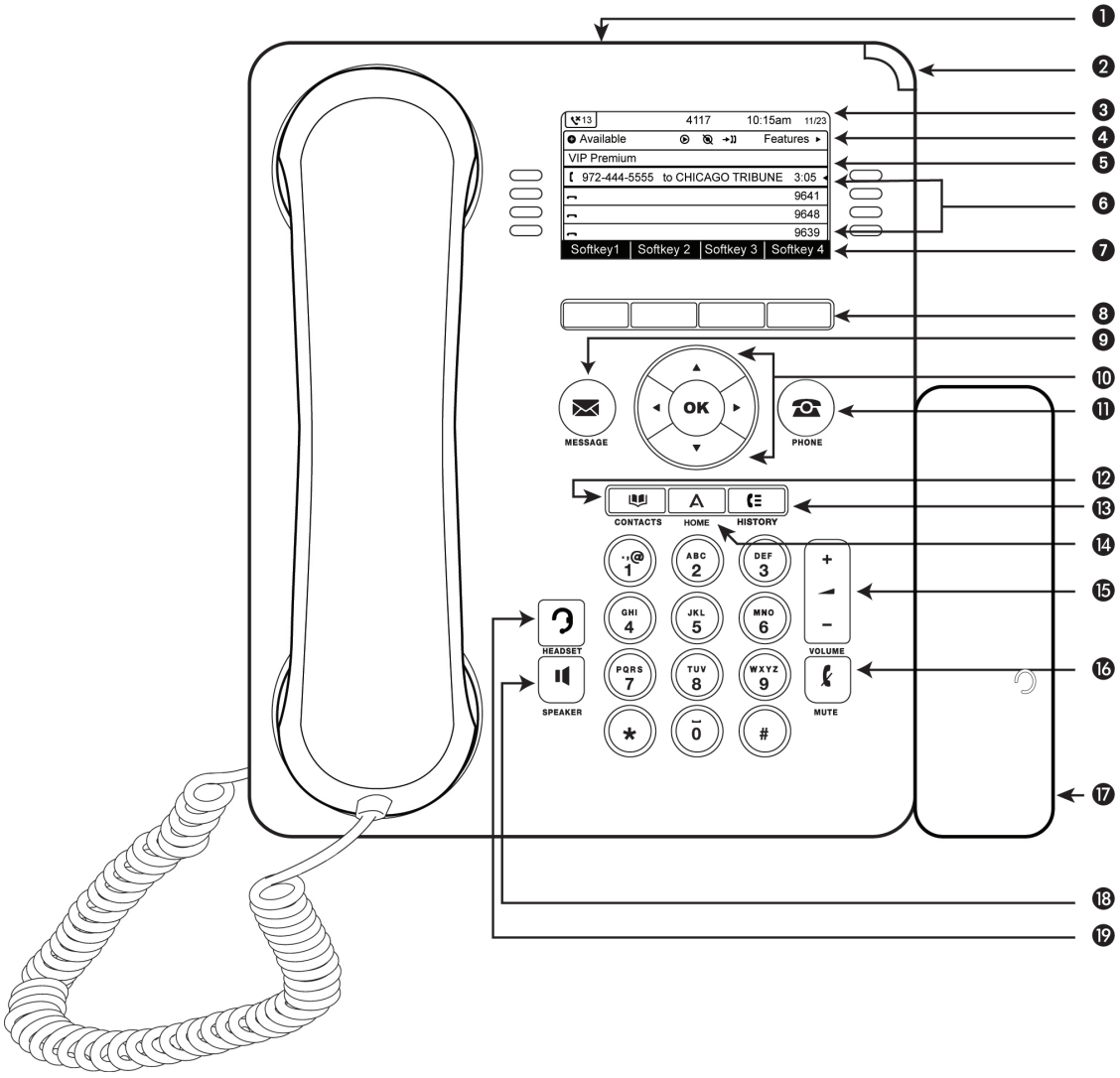
Callout No.	Name	Description
3	Phone Display: Top Line	When the phone is idle, the top line shows the missed call icon with the number of calls missed, your primary extension, and the time and date. System messages also display on the top line.
4	Phone Display: Agent Status Line	When you are logged in as an agent, the Status line shows your current work status. For more information, see About status line information and icons on page 28. Tap **Features** on the right side of the Status line to move from the Phone screen to the Features list. Tap **Calls** on the right side of the Status line to move from the Features list to the Phone screen.
5	Phone Display: Agent Information Line	The Agent Information line below the Status line shows information about a call state; see About the agent information line for information.
6	Call Appearance/ Feature lines	When the Phone screen is active, the lines below the Status line show call appearances. For example, information about an active call, an idle line, or which line has a held or conference call. Tap a call/line appearance to make or answer a call. When the Features list is active, the lines show the call center features you use to do your job, such as VU Stats, After Call work and other features. **Note:** By default, the feature labels and call/bridge appearances appear on separate screens. However, you can request the administrator to configure a consolidated screen for feature labels and call/bridge appearances. Tap a labeled feature button to enable or disable that feature. The feature buttons provide access to the Avaya call center system features that have been administered for your extension. The green LED next to each feature button indicates if the feature is currently on or off. If the green light is on, the feature is on. The feature buttons provide the same features that are available in the features menu. If you have the Quick Touch panel activated at the bottom of the display (see Setting the Quick Touch panel on page 38 panel), only two or three call appearance lines show on the display, depending on how many lines you indicate for the Quick Touch panel.
7	Softkeys	The bottom line of the display shows the softkeys applicable to the information displayed on the screen. Softkey labels appear directly on the softkeys, which you tap to take the indicated action. The labels and the actions vary depending on the current context.
8	Quick Touch Panel	If administered, the Quick Touch panel provides additional buttons for features and work modes. Note that when displayed, the Quick Touch panel might overlay some of your call appearance lines. For more information, see Setting the Quick Touch panel on page 38.
9	Contacts	Press the **Contacts** button to view the entries in your contact list.

Callout No.	Name	Description
10	Home	Press the **Home** button to access the Home screen. The Home screen provides options to customize phone settings, configure call logging, select the display language, view network information, and log out the telephone extension.
11	History	Press the **History** button to view a list of your outgoing, incoming, and missed calls. The icon on the History button is illuminated when you have missed calls. Direct agent calls (DAC) will show on your log but call center calls will not.
12	Phone Button	Press the **Phone** button to return to the Phone screen from the Features list or another application.
13	Message	Press the **Message** button to connect directly to your voicemail system.
14	Volume	Press **+** or **-** on the **Volume** button while active on the headset to adjust the volume. To adjust the volume of the ringer, press + or - on the volume button while the headset is inactive.
15	Mute	Press the **Mute** button to mute a call in progress. To take a call off mute, press **Mute** again.
16	Dual Headset Adapter	When attached, two people with headsets can listen to the same call with this adjunct device.
17	Release	Press the **Release** button to end a call. Note: This button appears only if the Contact Center (CC) face plate is attached to the 9641G model.

Note:

A **Release** button is displayed instead of the **FORWARD** and **HEADSET** buttons on the deskphone, when the deskphone is attached with a CC face plate. The face plate can be attached to the 9641G phone only.

9608 and 9611G buttons and features



	Name	Description
1	USB Port	Available on 9611G deskphones only. If administered, you can insert a USB device such as a memory stick, thumb drive, or flash drive to transfer contacts between your phone and an external data source. You can also recharge some battery-powered devices by using a USB cable to connect the device to USB port of your deskphone. Note: The 9608 deskphone does not have a USB port.
2	Message Waiting Indicator	An illuminated red light in the upper-right corner of your phone indicates you have messages waiting. This light flashes when you receive an incoming call.

	Name	Description
3	Phone Display: Top Line	When the phone is idle, the top line shows the missed call icon with the number of calls missed, your primary extension, and the time and date. System messages also display on the top line. **Note:** After successful agent log in, the primary extension on the top line is replaced by Agent ID.
4	Phone Display: Agent Status line	When you are logged in as an agent, the Status line (below the top line) shows your current work status; see About status line information and icons on page 28 for information.
5	Phone Display: Agent Information line	The Agent Information line displays all agent related information such as caller information, user-user information, and agent status information depending on the VU-stat configuration. For more information, see About the agent information line.
6	Phone Display: Call Appearances/Feature Lines	When the Phone screen is active, the Call Appearance lines show call information, for example, information about an active call, an idle line, or a line that has a held, or a conference call. When the Features list is active, the display area shows the call center features you use to do your job, such as VU Stats, After Call work and other features. **Note:** You can change the screen width from Full width mode where each call appearance or feature occupies the entire width of a line to Half width mode where each call appearance or feature occupies half the width of a line, effectively splitting the screen in half. For more information on changing the screen width, see Setting the phone screen width on page 38.
6	Call/Line Appearance Buttons or Feature Buttons	The right and left sides of the display screen have up to 8 buttons that you can program as either call appearance, line buttons or feature buttons. Press a call appearance, or line button to make or answer a call or to resume a call on hold. Press a labeled feature button to activate or deactivate that feature. The feature buttons provide access to the Avaya call center system features that have been administered for your extension. The green LED next to each feature button indicates if the feature is currently on or off. If the green light is on, the feature is on. The feature buttons provide the same features that are available in the Features menu. For more information about the features menu, see the Features Menu.
7	Phone Display: Softkey Labels	The bottom line of the display shows the softkey labels applicable to the information displayed on the screen.
8	Softkeys	Press the softkeys to select the actions indicated by the softkey labels above them. The labels and the actions vary depending on the current context.
9	Message	Press the **Message** button to connect directly to your voicemail system.

	Name	Description
10	Navigation Arrows	A scroll bar appears on the right side of the display area when there is more information than can be displayed. Press the up or down navigation arrows to scroll through lists in that direction. Press the right or left navigation arrows to navigate between different views of an application, to move between the Calls screen and the Features menu, to move the cursor during text input, or to move between options.
10	OK	Press the **OK** button for a shortcut to an action. For example, when you select a call log entry, pressing **OK** dials the number.
11	Calls/Features	Press **Calls** to move from the Features list to the Phone screen. Press **Features** to move from the Phone screen to the Features list. Pressing the Phone button on the phone also displays the Phone screen.
12	Contacts	Press the **Contacts** button to view the entries in your contact list.
13	History	Press the **History** button to view a list of your outgoing, incoming, and missed calls. The icon on the History button is illuminated when you have missed calls. Direct Agent Calls (DAC)s will show on your log but call center calls will not.
14	Home	Press the **Home** button to access the Avaya menu. The Avaya menu screen provides options that allow you to customize phone settings, configure call history logging, select the display language, view network information, and log out the telephone extension.
15	Volume	Press **+** or **-** on the **Volume** button while active on the headset to adjust the volume. To adjust the volume of the ringer, press + or - on the volume button while the headset is inactive.
16	Mute	Press the **Mute** button to mute a call in progress. To take a call off mute, press **Mute** again.
17	Dual Headset Adapter	Attach an adjunct device with which more than one person can listen in on a call. This feature is available on the 9608 deskphone.
18	Speaker On/Off	Illuminates when the Speakerphone is active.
19	Headset On/Off	Illuminates when a Headset is active.

Using the on-screen keyboard

If you have a touch-based deskphone such as a 9621G or 9641G, an on-screen keyboard appears when you add or edit any text. You can switch between alphabetic and numeric keyboards, and you can use the keyboard to enter symbols and accented letters.

Use the following diagrams to add or change text or numbers. Tapping and holding down the right or left buttons of the Backspace or cursor produces an automatic repeat action that stops when you lift

your finger or stylus. Remember to tap the **Done** check mark when you finish editing. Use the **X** icon to discard any edits and return to the previous screen, retaining the original information.

Figure 1: Text Entry Keyboard

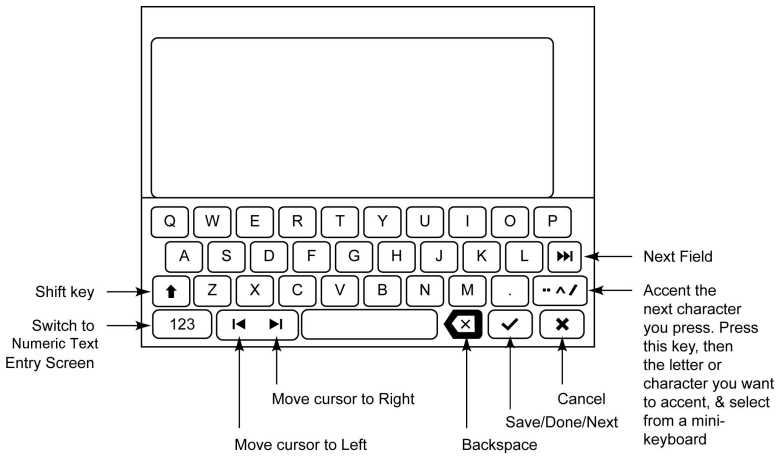
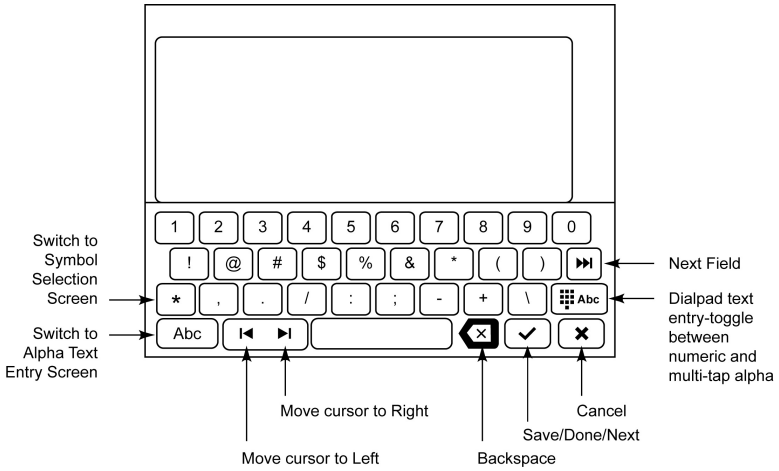


Figure 2: Numeric Entry Keyboard



Adjustable deskphone stand

The deskphone stand attaches to the phone in two ways. You you can keep the phone in a relatively flat position or at an angle. Before you attach the stand, note the Model Number label on your deskphone, attached to the underside of the deskphone.

You can adjust the display screen of the 9621G and 9641G models to different angles for optimal viewing. To move the display screen, gently pull the top of the display screen towards you. As you pull the screen towards you, you can hear a clicking sound. Each of these four clicks is a locking position for the display screen. Gently push on the display screen to adjust the screen to a previous position. Gently pull the display screen all the way towards you and push to return it to the original flat position.

Logging in and signing in

Call center agents have two types of logins:

- One for the deskphone extension itself called login.
- One that identifies you as a call center agent called sign in.

To sign in as an agent, you must first log in to the deskphone itself unless the deskphone is already logged in. To log out from your deskphone extension, you must first sign off as an agent. If you share a deskphone with another agent, you may be instructed to just sign in and sign off as an agent, leaving the deskphone logged in at all times to preserve call center information. You can sign in and sign out as an agent using one of the following ways, depending on how your call center system is administered:

- Using a Feature access code (FAC) provided by your supervisor.
- Using a Feature button labeled **Sign In** or **Sign Out**.
- Using a Feature button labeled **Login** or **Logout**.
- Using another Feature Button, softkey, autodial button, or abbreviated dial button designated by the system administrator for agent sign in and sign out.
- Using Computer Telephony Interface (CTI) agent login.

Note:

If your CM version does not support Agent ID query, the deskphone will attempt to detect the Agent ID by itself. One of the following conditions must be met for Agent Login Detection to properly detect the Agent ID:

- After the agent presses dialpad buttons in the sequence the administrator has specified in the Agent Login FAC (parameter AGTLOGINFAC in the settings file), followed by more dialpad presses and then an Auxiliary Work button is lit, the second sequence of dialpad presses is assumed to be the Agent ID.
- The agent logs in with a pre-administered Abrv-dial/Autodial button that contains the Agent Login FAC followed by a complete Agent ID. Password cannot be administered as part of the button.
- The Agent Login Detection using VuStat feature must be fully implemented.

Your supervisor will explain the proper agent sign in and sign out procedures for your call center environment, which may not be the same as the procedures provided in this chapter. In all cases, follow the agent sign in and sign out procedures provided by your supervisor.

Logging in to your deskphone extension

About this task

Before you can sign in as an agent, you must log in to your deskphone extension if you have not already done so. Log in from the initial screen at the system prompt for your extension.

Procedure

1. Enter your extension in the text box on the deskphone display.
2. If you have a touch-based deskphone, tap **Enter**. If you have a button-based deskphone, press **Enter** or **OK**.
3. Enter your password.
4. If you have a touch-based deskphone, tap **Enter**. If you have a button-based deskphone, press **Enter** or **OK**.

Logging out of your deskphone extension

Procedure

1. Press **Home**.
2. If you have a touch-based deskphone, select **Settings**. If you have a button-based deskphone, proceed to step 3.
3. If you have a touch-based deskphone, tap **Log Out**. If you have a button-based deskphone, scroll down and select **Log Out**.
4. If you have a touch-based deskphone, tap **Log Out** to confirm. If you have a button-based deskphone, press **Log Out** or **OK**, then press **Log Out** to confirm.

   After you have logged off, the status line displays *Logged out*.

Signing in as an agent

About this task

If the deskphone prompts you for your extension, you must first log in to the deskphone before your enter your call center agent identification.

Important:

The agent sign in procedure uses a Feature access code (FAC). Depending on how your call center operation is administered, this particular sign in procedure may not apply. For example, some call center systems may be administered for Agent sign in using a Feature Button or softkey. In this case, sign in to the Call Center as you have been trained to do by your supervisor.

Note:

When signing in using mode other than Feature Access Code (FAC), the agent greetings that are recorded will not be backed up and the Agent ID will not display on the top line. To get the Agent Greetings backed up and the Agent ID to display on the top line, contact your administrator. In all cases, follow the Agent sign in and sign out procedures provided by your supervisor.

Procedure

1. Enter your Sign In Feature Access Code using the dialpad.

2. Enter your Agent ID using the dialpad.
3. Enter your Agent Password, if applicable.

Result

The top display line now shows your Agent ID and the Agent Status line shows your current status such as Aux Work. The headset LED is illuminated and the Aux Work feature button is shown as active or on.

Signing off as an agent

About this task

Depending on how your call center system is administered and how busy the call center is, the system may override your attempt to sign out. In this case, follow the procedures specified by your supervisor. The sign-out operation can be carried out using the Agent Logout Feature Access Code.

Press the **Agent-logout** softkey to sign off as an agent.

Result

The top display line no longer displays the Agent ID. The Agent Status line displays the current status as **Logged Out**.

Note:

Depending on how your administrator has configured your extension, the headset LED and audio path might remain switched on, even after you or any other agent logs out.

Ringing on wireless headsets

For an incoming call, you can set the ringing tone on the wireless headset instead of the speaker of the deskphone.

Note:

This feature is available only if your administrator has configured the feature for your deskphone.

When you go off-hook with the headset or change from a non-headset device to the headset, phone activates the wireless headset. When you go on-hook with an activated headset or change from wireless headset device to non-headset, the phone deactivates the wireless headset.

When an incoming call arrives:

- If the deskphone is in an idle mode, you hear a ringing tone in the wireless headset.
- If the phone is already in a headset call, you hear a short beep in the wireless headset.

Chapter 3: Navigating the deskphone

Scrolling and navigation using touch-based deskphone models

If you have a 9621G or 9641G deskphone model, use the on-screen up and down arrow buttons on the upper right corner of the screen to scroll up or down through a list.

To change between call appearances and features, tap **Features** or **Calls** in the upper right of the display, depending on the screen that is currently on display.

On touch-based phones, a list item has a **Details** button with a blue right-facing arrow. Tap the button to see more information about the item.

You can perform an action on objects such as a line or softkey, by tapping the object or by tapping the on-screen softkey labels. Softkey labels change according to the context.

Scrolling and navigation using button-based deskphone models

On a 9608 and 9611G model deskphone, a navigation icon in the phone indicates that you can scroll to more options or information. When navigating through the options and features on your phone display, use the navigation arrows to scroll and the line buttons or the **OK** button to select lines or options. You can find the navigation arrows on the phone surrounding the **OK** button.

When you scroll to a line on the display, you select that line which is indicated by highlighting. The softkey labels change according to the options available for the selected line. The **OK** button is a shortcut for the default action. You can also select a line or feature without scrolling by pressing the corresponding line button.

Call Center work icons

The icons in the following table indicate the state of a call, navigation choices, or the status of a call center feature or activity. Depending on the action assigned to the icon, the icons can appear on the agent status line, the Information line, a call appearance line, or in the general application area of

the display screen. If you have a 9608 monochrome deskphone, the icons show in black and white. If you have a color display deskphone such as the 9611G, 9621G, or 9641G, the icons display in color or gray shades or both.

Note:

For information about the agent work status icons, see About status line information and the icons on the status line on page 28.

Icon	Description
	Missed calls. A call was not answered or was forwarded to voice mail. The total number of missed calls displays next to this icon.
	This call appearance line is idle and not in use.
	An incoming call is alerting on this call appearance line.
	A call is active on this line.
	A call is on Hold on this line.
	The deskphone is forwarding your calls.
	A Conference is active on this line.
	A Conference is on hold on this line.
	A Bridged Call is in progress on this line.
	On the Phone screen display, use the right arrowhead icon to gain access to the Features screen. On the Features screen display, use the right arrowhead icon to gain access to your calls on the Phone screen.
	Scroll up or down when the display has more information than can display in the application area.
 (9608)  (9611G)  (9621G, 9641G))	Indicates a Forced Logout Override is in effect. Depending on how the administrator configire your call center system, a system-generated forced logout might occur. For example, based on the time of day. This icon indicates an override is active.
 (9608)  (9611G, 9621G, 9641G)	Notifies you that the system has recorded your Agent Greeting and the greeting is available.
	Notifies you that the phone is playing your Agent Greeting.

Icon	Description
(9608)  (9611G, 9621G, 9641G)	
 (9608, 9611G)  (9621G, 9641G)	Indicates the Queued Calls feature is active and you have calls in the queue.
Σ (9608)  (9611G) (9621G, 9641G)	Indicates that the VU Stats feature is active.
 (9608, 9611G)  (9621G, 9641G)	Use the feature arrows to move left or move right between feature settings, for example, to select a Greeting type when establishing an Agent Greeting.

Note:

For example, some screens such as the Contacts main screen, do not display these icons to make room for other controls and indicators that apply to that specific screen.

Status alerting

For button-based agent deskphone models, such as 9608 and 9611G, each call, each call appearance button and feature button has two LEDs, one green and one red, to indicate the status of the call appearance or feature. For touch-based agent deskphones such as the 9621G and 9641G, the phone displays the entire line in color to indicate call status, and for the Feature list. A colored square icon indicates the status of the Features list. You identify the status by checking whether the LED or color highlight is on, off, or blinking LEDs only as described in the following tables.

Table 1: Call appearance button LED colors

LED or line color	Description
Steady green LED	Call appearance or feature is active. Applicable to the 9608 and 9611G deskphones only.
Steady yellow highlight on line	Call appearance is active. Applicable to the 9611G deskphones only.
Slow blinking green LED	Call appearance is ringing. Applicable to the 9608 and 9611G deskphones only.
Steady green highlight on line	Call appearance is ringing. Applicable to the 9621G and 9641G deskphones only.
Steady red LED	Call appearance is selected and will be used when you go off-hook. It remains steady red while you use the call appearance. Applicable to the 9608 and 9611G deskphones only.
Flashing line LED	Call put on hold using the **Hold** soft key.
Fluttering or unsteadily flashing line LED	Call put on hold as part of conference or transfer procedure state.
Off	Call appearance is available.

Table 2: Feature button LEDs

LED/Square Icon	Description
Steady green	Feature is active.
Off	Feature is not active.

Home screen and Avaya menu

If you have a 9621G or 9641G deskphone, the Home screen displays icons that provide access to customize options and settings for your deskphone, record and update your greetings, get information about your phone and network settings, and log out. But if you have a 9608 or 9611G deskphone, the Avaya Menu provides access to those features instead.

Note:

The options, settings, and sub-menus that appear on the Home screen and Avaya menu depend on how your extension was administered. Some items described here may not be available. Other options, settings, and submenus might be available which are not specifically related to a call center. For those standard features, see *Using Avaya IP Deskphone 9608 and 9611G H.323* and *Using Avaya IP Deskphone 9621G and 9641G H.323*, available on the Avaya Support Site:http://avaya.support.com.

The Home screen on touch-based phones

Press the **Home** button on the display screen to gain access to the Home screen. The Home screen has a black background with icons. With the icons, you can adjust or customize the options and settings, or view the phone and network settings. From the Home screen, you can also set up and update your Agent Greetings, use the Web-based applications to get information about the time and weather in different parts of the world, display a calculator, and use the Favorite speed dial buttons. Use the **My Pictures** option on the Home screen to load a picture from a USB device as a phone screensaver. The exact content of your Home screen depends on how your administrator has set up your system but the screen normally includes the following standard Avaya features:

- Greetings: You can add up to six agent greetings, edit those greetings, and remove greetings you no longer need.
- Settings: You can use change your call settings, the language in which information displays on the screen, the way your screen looks and sounds, log into a phone as a guest, clean your screen, log out your phone.
- World Clock: You can see the time and weather in different parts of the world. This Avaya application might not be available on Call Center deskphones.
- Weather: You can see the current weather conditions in an area you choose and a short-term weather forecast. This Avaya application might not be available on Call Center deskphones.
- Calculator: You can use the simple, four-function calculator. This Avaya application might not be available on Call Center deskphones.
- My Pictures: You can use pictures from a USB device as your deskphone screensaver.

Your administrator may make other Web-based applications available to you, for example, a corporate directory or support page. To start any application you see on the Home screen, tap the icon. Depending on how many Avaya applications, contact favorites, and Web-based applications are administered, you may have a second page for your Home screen. Tap the scroll bar on the right side of the Home screen to view the next page.

Note:

The Settings options depend on how your extension was administered. Some options described in this guide may not be available on your deskphone. This guide describes the Greetings option only. For other features and applications that may be on your touch-based deskphone, see *Using Avaya IP Deskphone 9621G and 9641G H.323*.

Avaya menu on button-based phones

You can use the Avaya menu to customize options and settings for your deskphone, add or update agent greetings, access additional web-based applications, get information about your phone and network settings, and log out. For details, see About Agent Greetings on page 31. The other menu choices are explained in detail in *Using Avaya IP Deskphone 9608 and 9611G H.323*. When you

press the **Home** button, you see the following menu, depending on how your administrator has set up your system and on the applications available to you:

Note:

The menus and sub-menus that you can see depend on how your extension was administered. Some options or sub-menus may not be available. Contact your system administrator if you have any questions.

Sample Menu — if no WML Applications administered	Sample Menu — with WML Applications administered
Greetings	**Greetings**
Phone Settings	**Options & Settings**
Guest Login	**Browser**
Log Out	**Network Information**
About Avaya IP Deskphone	**VPN Settings**
My Pictures	**Log Out**
	About Avaya IP Deskphone
	My Pictures

Note:

On menus without WML applications, select **Phone Settings** to access the standard telephone Options & Settings menu.

- Greetings: You can add an agent greeting, change an existing agent greeting, or remove an agent greeting you no longer need.
- Options & Settings: If your menu is customized, you can change your call settings, personalize button labels, adjust brightness and contrast, select your ringing pattern, and more.
- The Browser menu contains additional web-based applications. (If no web applications are available for your phone, the Browser menu is not shown.)
- Network Information: You can see a summary of network-related parameters for your phone and provides diagnostic information. If your administrator has set up Web applications, this option appears under the Phone Settings menu instead.
- About Avaya IP Deskphone provides the release number of your phone software; our administrator may ask you to check the release number to troubleshoot problems.
- Guest Login: You can log in to a phone to which you are not normally assigned, to access your own contacts and features.
- Log Out: You can sign off the phone, to protect your settings or to allow another user to log in. Log out does not display unless your phone and any associated button module is in an idle state.
- My Pictures: You can use pictures from a USB device as your deskphone screensaver. This feature is available on those deskphones with a USB interface.

About the Features menu

Your administrator might have set up your deskphone so that it presents the features as described in this chapter together on one screen with your call appearances. If yes, the features do not appear on a separate Features menu. However, for most agent deskphones, the Features menu gives you access to agent work modes, Speed Dial buttons, or advanced telephony features like Directory, Abbreviated Dial, and Call Forwarding. With the Directory, you can dial other users on your system by name. If your administrator sets up Abbreviated dialing, you can dial certain numbers by touching one number on the dialpad. You can use Send All Calls and Call Forward to have your incoming calls sent to other numbers.

Note that if you have a touch-based phone, any features assigned to an attached button module will not display on the Features menu. if you have a button-based phone, features assigned to the button module will display on the Features menu. The particular features available to you depend on what your administrator has assigned to your phone.

In addition to the Features menu, your administrator may also place selected features on softkeys on the call appearance (Calls) screen. For touch-based phones, frequently used features can also be set up on the Quick Touch panel, if the panel is activated. For more information about what features and options are available for your extension, contact your system administrator.

Accessing the Features menu

Procedure

1. If you have a touch-based deskphone model such as 9621G or 9641G, from the Calls screen, tap the **Features** button in the upper right corner to view the Features menu. If you have a button-based deskphone model such as the 9608 or the 9611G, use the **Right** navigation arrow from the Phone screen to access the Features menu.

   On a touch-based model, the □ icon next to a feature indicates the feature status.

   For a button-based model, the feature line button indicates its status. If shown in green on color phone models, the feature is active; if the icon is gray-shaded the feature is available but not active. For models with LEDs such as 9608 and, 9611G, the LED next to the feature name indicates if the feature is currently on or off. If the light is on, the feature is on.

2. Scroll down to see the features that have been administered for your extension.

Accessing features using a button module

About this task

If you have a button module attached to your agent deskphone, the button module might have feature buttons for call center features, additional call appearances, and standard deskphone features like Call Forwarding, Call Pickup, Go to Coverage, or Auto Callback.

Note:

The 9621G deskphone does not support button modules.

Procedure

To use a feature button on a button module, press the button next to the feature you want to activate. Depending on your button module model, the LED associated with the feature you select lights up to indicate that the feature is active.

Ringing on wireless headsets

For an incoming call, you can set the ringing tone on the wireless headset instead of the speaker of the deskphone.

Note:

This feature is available only if your administrator has configured the feature for your deskphone.

When you go off-hook with the headset or change from a non-headset device to the headset, phone activates the wireless headset. When you go on-hook with an activated headset or change from wireless headset device to non-headset, the phone deactivates the wireless headset.

When an incoming call arrives:

- If the deskphone is in an idle mode, you hear a ringing tone in the wireless headset.
- If the phone is already in a headset call, you hear a short beep in the wireless headset.

Accessing the Features screen

About this task

Use this task to gain access to the **Features** screen.

For models with LEDs, the LED next to the feature name indicates if the feature is currently on or off. If the light is on, the feature is on.

Procedure

1. On the Phone screen, use the right navigation button to gain access to the **Features** screen.

   To return to the main Phone screen, press **Phone** or scroll to the left.

2. Scroll down to see the features that have been administered for your extension.

   The green LED next to the Feature button indicates if the feature is currently on or off. If the light is on, the feature is on. The red LED next to the Feature button blinks while the feature label is displayed on the screen.

Accessing features using a button module

About this task

If you have a button module attached to your agent deskphone, the button module might have feature buttons for call center features, additional call appearances, and standard deskphone features like Call Forwarding, Call Pickup, Go to Coverage, or Auto Callback.

Note:

The 9621G deskphone does not support button modules.

Procedure

To use a feature button on a button module, press the button next to the feature you want to activate. Depending on your button module model, the LED associated with the feature you select lights up to indicate that the feature is active.

About agent work modes and states

When you are logged in as an agent, icons on the top two display lines and the Feature buttons show your current work mode and state. Agent work modes are Auto-In and Manual-In. An agent will usually have only one work mode which is either Auto-In or Manual-In as administered for the agent. Agent states are:

Pending	You are in the Available state, but have pressed an Aux or ACW button. The Pending state reminds you that when the call is completed, you will be placed in the Aux or ACW state as applicable.
Aux	You are placed in the Auxiliary state after agent login. You must change to Auto-In or Manual-In work mode to become available to receive incoming call center calls. You can change back to Aux to indicate you are not available to receive call center calls, for example, when you want to take a break. You must enter a Reason Code when changing to Aux. This feature might be optional or compulsory depending on how your system is administered.
ACW	The deskphone may automatically put you into an After Call Work (ACW) state after you complete each call. If you were in Manual-In mode before the call, you must re-enter a Manual-In mode to accept another call. Switch to ACW to perform after call work, such as completing a call-related form.
Available	You have to move to Available state through Auto-In and Manual-in feature button when you want to handle calls.

Logged Out	This state is automatically assigned when the deskphone is administered as a call center phone but no agent sign-in has occurred. If you sign out as an agent but do not log off the deskphone, this status is also assigned.

Note:

Pressing the **Mute** button twice turns on the mute LED that indicates the deskphone is in an off hook idle state.

To learn how to interpret upper line displays, see About status line information and icons on page 28 and About the agent information line. For information on the icons and button LEDs you might see while signed in as an agent, see Call Center work icons on page 19 and Status alerting on page 21.

About status line information and icons

What you see on the status line of the display screen depends on what you are doing at the time. Special icons indicate your status. At times, the deskphone might display more than one icon.

Icon and text	Indicated Status
for monochrome displays, or for color displays, and the word **Available**	Signed in, in Available mode, and with no Aux Work pending.
for monochrome displays, or for color displays and the word **Pending**	Signed in, in Available mode, and with Aux Work or After Call Work pending.
for monochrome displays, or for color displays, and the words **Aux Work**	Signed in and in Aux Work mode.
for monochrome displays, or for color displays, and the words **After Call**	Signed in and in After Call Work mode.
for monochrome displays, or for color displays, and the words **Logged Out**	Signed out as an agent.
Σ for monochrome displays, or VU for the 9611G color display, or 123 for the 9621G and 9641G color displays.	The VU Stats feature is active.
for monochrome displays or for the 9611G color display or for the 9621G and 9641G color displays.	Incoming calls are queued up and waiting.

Icon and text	Indicated Status
 for monochrome displays, or  for the 9611G color display, or  for the 9621G and 9641G color displays.	Forced logout override is in effect.

For more information on other status indicators and icons for call center activities, see Call Center work icons on page 19.

Chapter 4: Using the deskphone in a call center

Using agent deskphones in the call center

Your duties as an agent involve understanding how the deskphone presents work-related information, including work modes and agent status, call information, and greetings.

Answering a call as an agent

About this task

Several variables such as your call center system configuration, call delivery mode, agent status, the number of greetings recorded determine how you answer a call.

For more information, see About agent work modes and states on page 27 and About status line information and icons on page 28.

In all cases, you are alerted to incoming calls by a special tone, the call appearance line button flashing green in case of button-based models, or the call appearance line itself highlighted in green for touch-based phones, and the ringing icon displayed on the incoming call's line.

Note:

If you have a touch-based deskphone such as the 9621G or 9641G, tap the appropriate softkey. If you have a button-based deskphone such as the 9608 or 9611G, press the appropriate softkey. Alternatively you can use the **Answer** softkey to answer a call or press the flashing line button for the incoming call on button-based models. You can also tap the call appearance line itself for touch-based models. Your supervisor will advise you as to how incoming calls to the call center appear and provide any details not covered below.

Procedure

1. If you are in either Manual-In or Auto-In mode, you must always wait for an alerting signal such as a ring or tone.
2. After the deskphone plays the alerting signal, tap or press the **Answer** softkey.

   If Auto-Answer is enabled, the phone generates a zip tone to alert you, and then activates the call. In either case, the table below identifies how to answer the call depending on the type of greetings you recorded:

Recorded greeting	Response to the greeting
No greeting is recorded.	Start speaking to the caller.
A non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call.	Listen to the greeting, and then start speaking to the caller.
No non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call, but one Manual greeting has been recorded.	Tap or press the **Greeting** softkey, listen to the greeting, and then start speaking to the caller.
No non-Manual greeting is recorded that matches the Type, Match Criterion, and String to Match for the incoming call, but more than one Manual greeting has been recorded.	Tap or press the **Greeting** softkey, select the appropriate greeting to return to the Phone screen, listen to the greeting, and then start speaking to the caller.

3. Press or tap **Release** to end a call, unless you are instructed otherwise by your supervisor.

Note:

Depending on how your administrator has configured your phone, you can also use the Speaker button to end a call.

Changing agent work mode or status

Procedure

Press or tap the line or feature button assigned to the work mode or work state to which you want to change. Alternately, access the Features menu screen and select the desired work mode/state. The associated LED flashes to indicate you are transitioning into the work mode or state you chose, and then remains lit steadily when the selected work mode or status is active.

About Agent Greetings

Agents can record their own *greetings* which can then be played back to callers. For example, *Thanks for calling Informaxx. My name is Sally. How can I help you?*. Up to six greetings can be set up, each ten seconds in length. Recorded greetings consist of a Label or a greeting name, the recorded greeting itself, and an optional type.

The agent initiates Manual type greetings while VDN greeting types play automatically by recognizing the number the caller has dialed and playing the corresponding greeting. This feature is important when the agent handles incoming calls for different departments or companies. When you set up a VDN greeting, you must specify the numbers (strings which may be alphanumeric or number or alphabet) that the system must look for to play the correct VDN greeting. You can also specify where in the phone number the system should look. The pattern of numbers the system looks for is called a *match string* and the place to look is called a *match criterion*.

For more information, see About call center greeting types on page 32. To set up a greeting, see Adding an agent greeting using a touch-based deskphone on page 34 if you have a 9641G or 9621G model or Adding an agent greeting using a button-based deskphone on page 36 if you have a 9608 or 9611G model.

Note:

Supervisors or administrators can prevent agents from setting up their own greetings. If you cannot see a Greetings option on the Avaya menu of 9608 and 9611G or the Home screen of 9621G and 9641G, your administrator has denied you permission to establish and modify your own greetings.

Important:

You cannot create, edit, or delete a greeting while you are in Available status, or when there is any call in progress whether active, or held, regardless of your status as an agent. You must change your status from *Available* to *Aux* or *ACW* for Agent Greetings option to appear in the A-menu or Home screen.

Note:

To create, edit, delete, or play a greeting on your deskphone, provide the deskphone your agent ID. If you have logged into the call center using the CTI login, and your agent ID is not displayed in the center of the Top Line, then you can only modify the greetings. The greeting would not be backed up after modifying the greeting label. In this situation, contact your administrator who may have created a special Vu-display feature button that you should press at this point, to populate the Agent ID at the top of the display.

About call center greeting types

When you add a greeting, a default type of *Auto Answer* is automatically assigned and will play that greeting for all incoming calls. Other types of greeting may apply to your operation depending on how the call center is set up and the number of customers are assigned to an agent. Your supervisor will assist you in setting up your greetings or might set the greetings for you. Because different greeting types have different match criteria options and associated text strings, use the following chart to determine with your supervisor the type of greeting and associated information best suited to each type of greeting you record.

Table 3: Greeting Types and Match Criteria

Greeting type	Description	Match criteria options
Manual	Agent must select the **Greetings** softkey to play the message for each incoming call.	None.
Auto answer (default)	The greeting plays automatically for an incoming call or for any incoming call that does not fully match the other options.	All calls: The default is to play for all incoming calls.

Greeting type	Description	Match criteria options
		In ready Mode: Play for incoming calls when agent status is Available.
VDN	Vector Directory Number. Call vectors are commands that route incoming calls to the call center and determine how these calls are processed. The VDN permits each call to be treated uniquely according to a number of factors, including the number the caller dials, the number the caller calls from, the number of calls in queue, and the time of day or day of the week or both.	Anywhere: The data matches any set of characters in the incoming call-associated display message. This is the option set by default. On left: The data matches the characters on the left end of the incoming call-associated display message. On right: The data matches the characters on the right end of the incoming call-associated display message. Exact match: The data matches exactly the entire incoming call-associated display message .
ANI	Automatic Number Identification. This type makes vector routing decisions based on the caller identity and the number of the originating line.	Anywhere: The data matches any set of characters in the incoming call-associated display message. This is the option set by default. On left: The data matches the characters on the left end of the incoming call-associated display message. On right: The data matches the characters on the right end of the incoming call-associated display message. Exact match: The data matches exactly the entire incoming call-associated display message.
Prompted Digits	Used in call centers with automatic recordings that *prompt* the caller to enter *digits* to reach a specific area of assistance in the call center. For example, a caller might be prompted to press *1* to reach Sales or *2* for Billing inquiries.	Anywhere: The data matches any set of characters in the incoming call-associated display message. This is the option set by default. On left: The data matches the characters on the left end of the incoming call-associated display message. On right: The data matches the characters on the right end of the incoming call-associated display message.

Greeting type	Description	Match criteria options
		Exact match: The data matches exactly the entire incoming call-associated display message.

Adding an agent greeting using a touch-based deskphone

About this task

You can add up to six different greetings and set them to play automatically or manually when you have an incoming call.

Note:

Use this procedure if you have a touch-based deskphone such as the 9621G or 9641G. If you have a button-based deskphone such as the 9608 or 9611G, see Adding an agent greeting using a button-based deskphone on page 36.

Procedure

1. Press **Home**.
2. Tap **Greetings**.
3. Tap **New** or any numbered blank greeting line.

   The phone displays the on-screen keyboard displays so that you can enter the new greeting label.
4. Use the on-screen keyboard to enter a label that distinguishes this greeting from other greetings you may already have or will be adding. The Greeting Label should be a maximum of 13 characters. For details on entering text using the keyboard, see Using the on-screen keyboard on page 14 .
5. Tap **Next**.
6. Tap **Record**.
7. Speak your greeting (up to ten seconds) into the headset, and then press **Stop**.
8. Choose one of the following options:
   - To listen to the greeting, tap **Play**.
   - To replace the greeting, tap **Restart** and repeat the previous step.
   - To save the recording, tap **Done** (right mark key) displayed in green color and proceed to the next step.
   - To delete the recording you just made, tap **Cancel**.

Next steps

If the default greeting type shown is correct, tap **Save** to save the Greeting, its label, and the Greeting type.

If the default greeting type is not the one you want, proceed to Changing the greeting type using a touch-based deskphone on page 35 before saving the greeting.

Changing the greeting type using a touch-based deskphone

About this task

When adding a new greeting, the telephone displays the **Greetings Type Selection** screen after you indicate that you have completed recording your greeting. New greetings are automatically assigned a default type of *Auto Answer* with a Match Criterion of *All Calls* and you use the **Greetings Type Selection** screen to change that default type, if required. When changing an existing greeting, the **Greeting Type Selection** screen displays when you select the greeting you want to change, and tap the **Type Details** icon.

The default greeting type *Auto Answer* with a Match Criterion of *All Calls* means that this greeting plays automatically when you answer an incoming call. The other greeting types are Manual, VDN, ANI and Prompted Digits. Other than Manual, all types require that you also select match criteria, such as when to invoke this greeting, or where to find the data to trigger the greeting. You must also select additional data, such as a telephone number sequence or string with which the system can match the display message to a specific greeting. This feature is useful when you deal with different groups of customers and want a customer-specific greeting to play based, for example, on the number the caller has dialed. For more information about Greeting Types and their applicable match criteria, see About call center greeting types on page 32.

Procedure

1. Ensure that the telephone displays the greeting whose type you want to change. Tap the **Details** icon on the right side of the Type line.
2. Use the **Right Arrow** on the Type line to cycle consecutively through the available types or the **Left Arrow** to cycle back through the types. Notice that the Match Criteria value below the type may change to correspond with the type currently displayed.
3. To change the match criterion for the greeting type, use the **Right Arrow** on the Match Criterion line to cycle consecutively through the available criteria or the **Left Arrow** to cycle back through the choices.
4. If the telephone displays the **String to Match** label, you must indicate what string of digits the telephone should look for. Tap the **String to Match** line and use the dialpad to enter the number sequence that should be matched for this greeting. For example, if you serve two customers with the telephone numbers 732-42-111 and 732-842-2222, you can enter just the last four digits of those numbers as the strings to match for their respective greetings. After entering the string, press **Done** to return to the **Type Selection** screen.
5. Tap **Done** again, then tap **Save** on the **Greetings Summary** screen.

Changing existing greetings

You can change an existing greeting in any or all of the following ways:

- You can edit the label of a greeting.
- You can re-record a greeting without changing any other part.
- You can edit the greeting Type, Match Criteria, or String to Match or both.
- You can delete the entire greeting and any associated data.

To change any part of a greeting, press **Home**, select **Greetings**, and then, select the greeting you want to change or remove.

For more information on the 9641G and 9621G models, see Adding an agent greeting using a touch-based deskphone on page 34 and Changing the greeting type using a touch-based deskphone on page 35.

For information on the 9608 and 9611G models, see Adding an agent greeting using a button-based deskphone on page 36.

You can then make a change as indicated in those procedures, and select **Save** to store the changes.

Adding an agent greeting using a button-based deskphone

About this task

You can add up to six different greetings and set them to play automatically or manually when you have an incoming call. The default greeting type *Auto Answer* with a Match Criterion of *All Calls* means that this greeting plays automatically when you answer an incoming call. Other types are Manual, VDN, ANI and Prompted Digits. Other than Manual, all types require that you also select match criteria such as when to invoke this greeting, or where to find the data to trigger the greeting. You must also select additional data such as a telephone number sequence or string, with which the system can match the display message to a specific greeting. This feature is useful when you deal with different groups of customers and want a customer-specific greeting to play based, for example, on the number the caller has dialed. For more information about Greeting Types and their applicable match criteria, see About call center greetings type on page 32.

Note:

Use this procedure if you have a button-based deskphone such as the 9608 or 9611G. If you have a touch-based deskphone such as the 9621G or 9641G, see Adding an agent greeting using a touch-based deskphone on page 34.

Procedure

1. Press **Home**.
2. Select **Greetings**.

3. Press **New** or press the line button for any numbered blank greeting line.
4. Use the dialpad to enter a label that distinguishes this greeting from other greetings you may already have or will be adding. The Greeting Label can be up to 15 characters.
5. Press **Record**.
6. Speak your greeting for up to ten seconds into the headset or speaker, whichever device is active, and then press **Stop**.
7. Choose one of the following options:
   - To listen to the greeting, press **Play**.
   - To replace the greeting, press **Restart** and repeat the previous step.
   - To save the greeting, press **Done** and proceed to the next step.
   - To delete the greeting without saving the greeting, press **Cancel**.
8. If the default greeting type shown is Auto Answer with a *Match Criterion* of *All Calls* is correct, proceed to the step 12. To change the greeting type, press the line button for the line on which Type appears to display the **Greetings Type Selection** screen and proceed to the step 9.
9. Use the **Right Arrow** to cycle consecutively through the available types or the **Left Arrow** to cycle back through the types. Notice that the Match Criteria value below the type may change to correspond with the type currently displayed.
10. To change the match criteria for the greeting type, press the line button on which Match Criteria appears, then use the **Right Arrow** to cycle consecutively through the available criteria or the **Left Arrow** to cycle back through the types.
11. Press the line button on which **String to match** appears and then, press **More**. Use the dialpad to enter a number sequence that should be matched. For example, if you serve two customers with the telephone numbers 732-842-1111 and 732-842-2222, you can enter just the last four digits of those numbers as the string to match for their respective greetings. After entering the string, press **More** again to return to the **Type Selection** screen.
12. Press **Done**, and then press **Save** on the **Greetings Summary** screen.

Changing agent work mode or status

Procedure

Press or tap the line or feature button assigned to the work mode or work state to which you want to change. Alternately, access the Features menu screen and select the desired work mode/state. The associated LED flashes to indicate you are transitioning into the work mode or state you chose, and then remains lit steadily when the selected work mode or status is active.

Chapter 5: Customizing the phone

Setting the phone screen width

Procedure

1. Press **Home**.
2. Press **Select** to select **Option & Settings** > **Screen & Sound Options** > **Phone Screen Width**.
3. Tap to select **Settings** > **Option & Settings** > **Screen & Sound Options** > **Phone Screen Width**.
4. Press **Change** to select one of the following options:
   - Full: Each call appearance or feature occupies the entire width of a line.
   - Half: Each call appearance or feature occupies half the width of a line, effectively splitting the screen in half or half to full.
5. Tap to select to select one of the following options:
   - Full: Each call appearance or feature occupies the entire width of a line.
   - Half: Each call appearance or feature occupies half the width of a line, effectively splitting the screen in half or half to full. If your screen width is set to half and you set the deskphone to display large text, the screen width will automatically change from half to full to allow the larger text size to display properly. In this case, if you prefer a split screen, you must turn off large text.
6. Press **Save.**
7. Press **Tap**.

Setting the Quick Touch panel

About this task

When you use the Quick Touch Panel (QTP), the Calls screen provides access to more of your work states and features, at a glance. When a feature is on or active, the associated button is highlighted in green. You can set the Quick Touch Panel to display one or two lines by default, or set it not to display at all. If you configure the deskphone to display the Quick Touch Panel, call appearances are limited to display to two or three lines at a time.

Note:

The QTP feature is available only on the 9621G and the 9641G deskphones.

Procedure

1. Press **Home**.
2. Tap **Settings**.
3. Tap **Options & Settings**.
4. Tap **Screen and Sound Options**.
5. On the **Screen and Sounds** menu, tap **Show Quick Touch Panel** to change the setting from 1 Line to 2 Lines, from 2 Lines to No, or from No to 1 Line.

   Note:

   If you are signed in as an agent, the default number of lines displayed on the Quick Touch panel is two lines. If you have not signed in as an agent, the default number of lines displayed is one.
6. Tap **Save** to save the setting or **Cancel** to return to the menu without saving.

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