



Using Avaya one-X[®] Agent

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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

The following table lists the documents for Avaya one-X[®] Agent and other related documents. Download the documents from the Avaya Support website at www.avaya.com/support.

Document number	Title	This document describes:	Audience
Overview			
	<i>Avaya one-X[®] Agent Overview and Specification</i>	The product characteristics and capabilities including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	Sales Engineers, Solution Architects, Implementation Engineers, and Support personnel
Implementing			

Table continues...

Document number	Title	This document describes:	Audience
	<i>Installing Avaya one-X[®] Agent</i>	The implementation of Avaya one-X [®] Agent in a customer environment. This guide provides details on system requirements, deployment options, implementation, customization through user scenario, and standard installation procedures.	Implementation Engineers and Support personnel
	<i>Installing server applications for Avaya one-X[®] Agent</i>	<p>The installation for the three server applications with Avaya one-X[®] Agent:</p> <ul style="list-style-type: none"> • Presence Services • Avaya Aura[®] Session Manager • Central Management for Avaya one-X[®] Agent <p>Describes the installation procedures for each applications in separate chapters because the server applications are optional for Avaya one-X[®] Agent 2.5 and later.</p>	Implementation Engineers and Support personnel
	<i>Migrating server applications from Avaya one-X[®] Agent 2.0 to 2.5</i>	The migration procedure for server applications from Avaya one-X [®] Agent 2.0 to 2.5. This document also has procedures to keep the user and configuration data of all server applications. In addition, the document has procedures for servers to migrate, remove, and reinstall in a sequence. The document also has procedures on the data restoration.	Implementation Engineers and Support personnel
	<i>Implementing Avaya Aura[®] Presence Services</i>	The procedures to install and configure Avaya Aura [®] Presence Services.	Implementation Engineers and Support personnel
	<i>Implementing Avaya Aura[®] Session Manager</i>	The procedures to install and configure Avaya Aura [®] Session Manager.	Implementation Engineers and Support personnel

Table continues...

Document number	Title	This document describes:	Audience
	<i>Installing and upgrading Avaya Aura® System Manager</i>	The procedures to install and upgrade Avaya Aura® System Manager.	Implementation Engineers and Support personnel
Supporting			
	<i>Avaya one-X® Agent Port Settings</i>	The steps to change the ports for firewall traversal rules.	Implementation Engineers and Support personnel
	<i>Troubleshooting Avaya one-X® Agent</i>	The procedures to troubleshoot the problems during the installation and administration of Avaya one-X® Agent and Central Management that Avaya one-X® Agent supports.	Implementation Engineers and Support personnel
Using			
	<i>Using Avaya one-X® Agent</i>	All tasks available to users of Avaya one-X® Agent.	Sales Engineers, Solution, Architects, Implementation Engineers, and Support personnel
	<i>Administering Avaya one-X® Agent</i>	The Avaya Aura® Communication Manager administration for the Avaya one-X® Agent configurations during the initial system setup and to change the configuration.	Implementation Engineers and Support personnel
	<i>Using Avaya one-X® Agent Central Management</i>	The agent features, and administration of Central Management features. This guides also describes how to use Central Management.	Implementation Engineers and Support personnel
	<i>Administering Avaya Aura® Communication Manager</i>	The procedures to configure Avaya Aura® Communication Manager.	Implementation Engineers and Support personnel
	<i>Avaya one-X® Agent quick reference guide</i>	The procedure to install the Interactive Installation procedure that agents use to install the Avaya one-X® Agent software.	Sales Engineers, Solution, Architects, Implementation Engineers, and Support personnel
	<i>Administering ACCCM for Avaya one-X® Agent Central Management</i>	The agent and supervisory features that administrators use to control Avaya one-X® Agent Central Management.	Implementation Engineers and Support personnel

Customizing			
	<i>Avaya one-X® Agent API document</i>	The API for customers to customize screen pop.	External customers

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

Procedure

- To find videos on the Avaya Support website, go to <http://support.avaya.com> and perform one of the following actions:
 - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.
 - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and perform one of the following actions:
 - Enter a key word or key words in the **Search Channel** to search for a specific product or topic.
 - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

 Note:

Videos are not available for all products.

Support

Go to the Avaya Support website at <http://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Warranty

To understand the terms of the limited warranty, see the sales agreement or other applicable documentation.

For information about the standard Avaya warranty and support for Avaya one-X® Agent during the warranty period, see the Avaya Support website at www.support.avaya.com in **HELP & POLICIES > Policies & Legal > Maintenance and Warranty Information**.

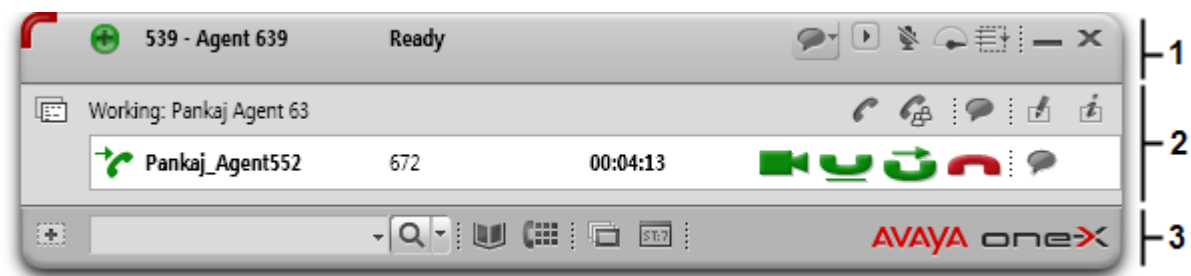
See also **HELP & POLICIES > Policies & Legal > License Terms**.

Chapter 2: Familiarizing with the Avaya one-X Agent UI

Avaya one-X® Agent main window

Avaya one-X® Agent occupies minimum space on the computer desktop. The desktop application provides a common look-and-feel and a flexible Graphic User Interface (GUI) configuration option to match the work an agent performs. With the main window, you can gain access to all features of Avaya one-X® Agent.

The following figure shows the components of the main window:



1	Top bar on page 15
2	Work List window on page 20
3	Action bar on page 26

*** Note:**

The desktop program does not display some features if the agent has not logged in to the Automatic Call Distribution (ACD) service in Avaya Aura® Communication Manager.

Top bar

The top bar is on top of the main window. The top bar provides the system status and main controls of Avaya one-X® Agent.

The following figure shows the different parts of the top bar:



1	Message-waiting indicator on page 16
2	Agent Status Indicator on page 16
3	Common controls on page 18
4	System Options on page 19
5	UI controls on page 20

Message waiting indicator

A message waiting indicator notifies that the voice mailbox contains messages. The message waiting indicator is on the upper-left corner of the top bar. The indicator changes the message state to unread message when you have an unread voice message in your voice mail system.

* Note:

The system displays the message-waiting indicator only if you integrated the voice mail system with Avaya one-X® Agent.

The following table lists the voice mail indicators:

Icon	Name	Description
	No Messages	The system does not display any icon if you do not have messages in the voice mail system. You can click the blank icon gain access to the voice mail system, if available.
	Unread Messages	The system displays this icon when you have an unread message in the voice mail system. Click this icon to connect to the voice mail system, if available.

Agent status and system messages

The system displays the agent status icons with the corresponding agent status on the left corner of the top bar. The top bar displays the name of the agent or the extension number with the corresponding system status. The top bar also displays temporary messages, including system error, network failure, or scheduled backup messages.

The following table describes the agent status icons that appear on the top bar:

Icon	Agent status	Description
	Ready	The system displays this icon when the agent changes the status to Ready from the Change Agent State drop-down list. The Ready message indicates that the agent is ready to receive calls from Communication Manager. Communication Manager delivers ACD calls depending on the configuration on Communication Manager for Multiple Call Handling (MCH). Communication Manager delivers an ACD call if the ACD call is in progress when you set MCH to Yes in Communication Manager. For more details about changing the agent work status, see Changing the agent work status on page 95.
	After Call Work	The system displays this icon when either the agent or Communication Manager changes the status to After Call Work (ACW). For more details about changing the agent work status, see Changing the agent work status on page 95.
	Pending After Call Work	The system displays this icon when the agent attempts to change the status to ACW from the Change Agent State drop-down arrow during the call. The system creates a pending ACW state and changes the agent states to ACW only after the agent completes the call.
	Auxiliary	The system displays this icon when the agent changes the status to AUX from the Change Agent State drop-down arrow. The AUX message indicates that the agent is not ready for ACD calls. Agents can make or receive calls on the station while in the Auxiliary state. For more information about changing the agent work status, see Changing the agent work status on page 95.
	Pending Auxiliary	The system displays this icon when the agent attempts to change the status to AUX from the Change Agent State drop-down arrow during a call. The system creates a pending Auxiliary state and changes the agent states to AUX only after the agent completes the call.
	Log Out	The system displays this icon when the agent changes the status to Logout from the Change Agent State drop-down arrow. The Sign Out message indicates that the agent has logged out of the ACD service. For more information about

Table continues...

Icon	Agent status	Description
		changing the agent work status, see Changing the agent work status on page 95.
	Pending ACD Logout	The system displays this icon when the agent changes the status to Logout from the Change Agent State drop-down arrow while on a call. The system logs the agent out from the ACD service only after the agent completes the call.
	Pending Logout	The system displays this icon when the agent disconnects the station from the System Options menu while on a call.

Common controls

The common controls are available on the left of the top bar.

Button	Name	Description												
	IM Status menu	<p>Use this button to set the IM status. The system displays the IM status with this menu only if you log in to Presence Services. You can set the following IM status messages:</p> <table><tr><td></td><td>Available</td></tr><tr><td></td><td>Busy</td></tr><tr><td></td><td>Be Right Back</td></tr><tr><td></td><td>Away</td></tr><tr><td></td><td>Do Not Disturb</td></tr><tr><td></td><td>Offline or Log Out</td></tr></table> <p>For more information about the IM status, see Viewing presence status on page 84.</p>		Available		Busy		Be Right Back		Away		Do Not Disturb		Offline or Log Out
	Available													
	Busy													
	Be Right Back													
	Away													
	Do Not Disturb													
	Offline or Log Out													
 	Agent Greetings	<p>Use this toggle button to start or stop an agent greeting playback. For more information about playing agent greetings, see Playing recorded greetings manually on page 96.</p> <p> Note:</p> <p>The system displays the Agent Greetings button only if you configure greetings in the Agent Preference dialog box. The button changes to</p>												

Button	Name	Description
		active only when the agent accepts an incoming call.
 	Mute Phone	<p>Use this toggle button to mute and unmute the audio. For more information about muting and unmuting the system, see Putting a call on mute on page 79.</p> <p>* Note:</p> <p>The Mute Phone button is only visible and active in the My Computer configuration.</p>
	Audio Monitor	<p>Use this control to view the current audio levels used for the microphone and speakers. For more information about viewing the voice quality, see Monitoring the audio quality and VoIP traffic on page 99.</p> <p>* Note:</p> <p>The Audio Monitor button is visible and active in the My Computer configuration.</p>

System Options

With the System Options menu, you can configure the Avaya one-X[®] Agent application.

Button	Name	Description
	System Options	<p>The System Options menu provides the following controls:</p> <ul style="list-style-type: none"> • Agent Preference: This option provides a centralized control to customize audio and GUI. • System Settings: This option provides an extensive and robust set of options to administer the Avaya one-X[®] Agent application. • Help: This option provides you quick access to the HTML help files. • About Avaya one-X Agent: This option displays the following details: <ul style="list-style-type: none"> - Current Avaya one-X[®] Agent version - Spark version - Install directory - Data directory - Extension number - Login mode

Button	Name	Description
		<ul style="list-style-type: none"> - IP address of the server - Server version - Configured proxy version. Displays the primary and secondary proxy server configured for the station. Green indicates the active state and red indicates the passive state. - Deskphone type - Supported features • Station Disconnect: This option logs the user out of the station. • Exit: This option closes the Avaya one-X[®] Agent application.

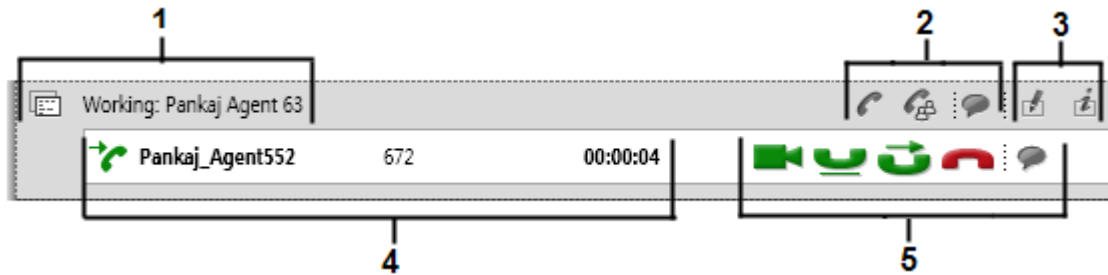
User Interface controls

Button	Name	Description
	Minimize Window	Use this button to minimize the Avaya one-X [®] Agent application.
	Exit Application	Use this button to quit Avaya one-X [®] Agent. The system prompts you to exit the application if you have an active work item. If you click Yes , the system closes the application. For more information, see Closing Avaya one-x Agent on page 105.

Work List window

The Work List window consists of work items and control buttons corresponding to the work item. The controls and functionalities change depending on the work list window response. The upper-right corner of the Work List window has work item controls. These work item controls are common to all work items in the Work List window. On receiving a call, the system notifies the corresponding call details in the work list window. When you accept the call, the system displays the control buttons for the work item.

The following figure shows the Work List window and the elements of Work List window:



1	Work item controls and functionalities on page 21
2	Work Item controls on page 22
3	View Work Item Information on page 22
4	Media appearance states on page 23
5	Call controls on page 24

Work item controls and functionalities

The system displays the work item menus and the corresponding icons on the upper-left corner of the Work List window. The controls and functionalities change depending on the Work List window state. By default, the system sets the option to Manual-Accept. You can change between these options.

The following table lists the icons that the system displays on the Work List window during an active call.

Icon	Name	Description
	Manual-Accept	This icon indicates that you must accept the call to answer the call. For more information about the manual-accept option, see Answering a call on page 61.
	Auto-Accept	This icon indicates that the application accepts the call when the system receives a call. For more details about auto accept, see Answering a call on page 61.

The system displays the Work Item status icon when you have an active work item in the Work List window. Icons change dynamically depending on the work item state. For example, when you have an active work item, the system displays an alerting icon with the corresponding message. When you accept the call, the system changes the icon to the work state dynamically. You can also copy the topic name which comes after work item state in work list by selecting the work item state and pressing the **Ctrl +C** button

The system displays the following work item states when you have an active work item in the Work List window:

Icon	Name	Description
	Alerting	The system displays this icon during an incoming work item. The icon remains in the alerting state until you accept the call.
	Working	The system displays this icon when you accept an incoming call. The icon remains in the working state through the call.
	Follow-up	The system displays this icon when you release an active call and opens the follow-up work for the work item. The icon remains in the follow-up state until you complete the follow-up work for the call.

Related links

[Changing the answer settings](#) on page 94

Work Item controls

The system displays the Work Item controls on the upper-right corner of the Work List window when you begin a call or when there is an incoming call. The Work Item buttons are common to all work items in the Work List window.

The following table lists the work item controls available during an active call:

Button	Name	Description
	Add New Call	With this button, you can talk to a contact in the list or a supervisor during a live call. You can add a new call by adding the call from the contact list or by entering the number manually.
	Conference	With this button, you can add a contact or a supervisor on a live call to a conference.
	Add IM	With this button, you can add an IM interaction to an active work item. You can select the IM user ID from the speed dial contacts, manually type the IM user ID, or select an ID from your contact list.

Work item information

The following table lists the work item controls available in the Work List window:

Button	Name	Description
	Work Code	The system displays this button during an active call. For more information about assigning a work code, see Assigning the work code on page 97.

Table continues...

Button	Name	Description
	WorkItem Details	The system displays this button for an active work item. For more information about viewing work item details, see Viewing the work item details on page 97.

Call appearance states

The system displays the call appearance states when the program receives an incoming work item or when you make a call. You can also view the call-related information, including the call type, caller name, deskphone number, call time, and duration. You can also copy the voice interaction details of remote caller, such as user name and deskphone number by pressing the **Ctrl +C** button on the keyboard.

The following table lists the call states that appear in the Work List window at the beginning and during an active call:

Icon	Name	Description
	Incoming Call	This icon indicates an incoming call. The icon first flashes and then remains in the answered state when you accept the call.
	Outgoing Call	This icon indicates an outgoing call. The icon first flashes, and remains in the answered state where the called party answers the call.
	Call Hold	This icon indicates that the call is on hold.
	Video Call	<p>This icon indicates a video session.</p> <p> Note:</p> <p>The system displays the video button if you have integrated Avaya Media Client with Avaya one-X Agent.</p>
	IM request	This icon indicates an IM interaction.
	TTY Call	This icon indicates a TTY call.
	Accept Desktop Share	This icon indicates that you requested to begin a desktop sharing session with the caller. The system displays this icon only if desktop sharing is in progress.
	Service Observing	This icon indicates a service observing session in progress on the supervisor desktop.

Call controls

The system displays the call controls when the system receives an incoming work item or when you make an outgoing call.

The following table lists the call controls that appear in the Work List window:

Button	Name	Description
	Call Answer	You see this button when the system recognizes an incoming call or when you put an active call on hold. For more information about answering a call, see Answering a call on page 61.
	Call Hold	Use this button to put an active call on hold. For more information about holding a call, see Putting a call on hold on page 71.
	Call Transfer	Use this button to transfer an active call to any other contact. For more information about transferring a call, see Transferring a call on page 77.
	Call End	Use this button to end an active voice call session. For more information about ending a call, see Ending a call on page 79.
	Video Call*	Use this button to begin a video call, if available. The system displays the video button only if the called party is using the video feature.
	Video Mute*	Use this toggle button with the video call to mute or unmute the video session.
	Video End*	Use this button with the video call to end the video session.
	Initiate IM	The system displays this button when you receive an IM conversation invite from a contact. For more information about starting an IM conversation, see Managing Instant Messaging and Presence on page 81.
	End IM	The system displays this button when you receive an IM conversation invite. Use this button to end the IM conversation. For more information about ending an IM session, see Ending an IM interaction on page 88.
	Initiate TTY	Use this button to accept an incoming TTY call and to open the TTY window to begin the TTY interaction. For more information about beginning a TTY call, see Answering a TTY call on page 91.

Table continues...

Button	Name	Description
	End TTY	Use this button to end a TTY interaction. For more information about ending a TTY call, see Ending a TTY call on page 92.
	Listen In (toggles to Barge In)	Activates the Listen In feature. The supervisor can use this feature to begin observing agent performance in an active call. The Listen In button is always on when service observing starts. Listen In is a toggle button and appears only in the supervisor desktop. For more information about Listen In, see Observing agent service on page 146.
	Barge In (toggles to Listen In)	With this option, the supervisor can enter a call under service observation and to communicate with the agent and customer on that call. The Barge In option is a toggle button and appears only in the supervisor desktop. For more information about Barge In, see Barging into an agent call on page 149.
	Quick Alert	Use this option to open the Quick Alert window for a call in a service observation session. With this feature, supervisor can send quick alerts to agents. For more information about quick alert, see Sending a quick alert on page 147.
	Coach	Starts a supervisor coaching session on a call under service observation. This opens an IM window for the supervisor to begin a coaching session for the agent, while the agent is still on the call. For more information about coaching an agent, see Coaching an agent on page 148.

*** Note:**

* The system displays the video feature buttons only if Avaya one-X[®] Agent is integrated with Avaya Media Client.

State Timer

State Timer is a visual representation of the time an agent spends in a particular state. Avaya one-X[®] Agentsupports the agent state timer for Ready, After Call Work, and Auxiliary states. State Timer displays the start time and the mode name in the Work Log panel. The system resets the timer value to zero when the agent or Communication Manager changes the state. The timer begins only if the user logs in as an agent.



State Timer for the Aux state :

The agent must treat the Aux state with different reason codes as different states. For example, if the agent is in the Ready mode and the agent receives a station call, then the system does not display the State Timer. However, when the station call is complete, State Timer forwards the call.

State Timer for the Follow-up state:

If the agent selects the Follow-up State Timer in **System settings > Work Handling**, the system moves the agent to ACW when the call ends. The system starts the ACW timer. But the system does not display the timer in the Work Log panel because the system displays the follow-up timer in the Work Log panel.

Note:

If the agent does not set the Follow-up timer, then the system displays an timer. The system counts this timer state as the ACW state.

State Timer during a call or conference call:

For a station call or a conference call, the system hides State Timer. But, the timer continues to count the agent state in the background. When the agent completes the station call or the conference, the system displays the timer value and the state name at the bottom of the Work Log panel.

State Timer for the new state:

If the timer does not support the new state, the agent must treat the state as the previous one. For example, if the agent switches from the Ready mode to the Pending Aux mode, the agent must treat this state as the Ready mode. The system resets the timer only when the agent switches to one of the previous states.

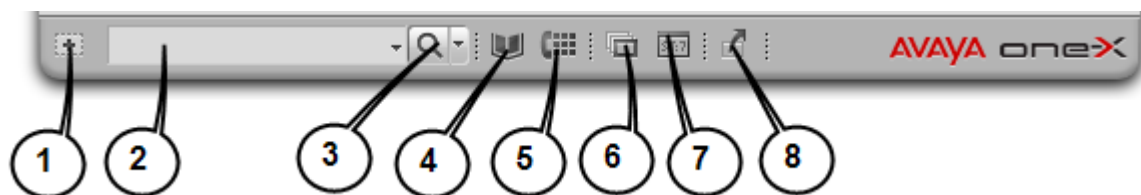
Action bar

The action bar provides global controls to perform the following tasks:

- Creating a new work item
- Searching a contact
- Beginning a media element
- Opening the secondary windows

The action bar is at the bottom of the main window, and remains at the bottom as the window expands.

The following figure shows the action bar and the elements of the action bar:



1	New Work menu on page 27
2	Text Input field
3	Work Options menu on page 27
4 through 8	Secondary windows on page 28

New Work menu

The system displays the New Work menu on the left side of the action bar during an active call session.

*** Note:**

When you select the media type from the New Work menu, the function button changes the menu to match the media type.

Menu	Name	Description
	New Call	Use this menu to clear the Text input field to accept the number to dial. The Work Options icon changes to New Call .
	New IM	Use this menu to clear the Text input field to accept the IM ID. The Work Options icon changes to New IM .

Work Options menu

The **Work Options** menu is available with the Text Input function menu. The **Work Options** menu performs the following functions based on contexts:

- Searching contacts
- Making a call
- Establishing conferencing
- Transferring a call

*** Note:**

As you type characters, the system displays the characters matching the result in the Contact List window or the Contact Logs window.

The following table lists the **Work Options** menu:

Button	Name	Description
	Search Contacts	<p>Use this button to search contacts from the Contacts window. You can view the following prompts in the Text Input field on a mouse rollover depending on the context:</p> <ul style="list-style-type: none"> • Search Contacts: Use this option to search contacts in the Contacts window. • Search Call Log: Use this option to search call logs in the Contact Logs window. <p>For more information about searching contacts, see Finding a contact on page 112.</p>
	Initiate Call	<p>Use this button to make a new call. For more information about making a call using the Text Input field, see Making a call from the Text Input field on page 65.</p>
	Conference	<p>Use this button to make a conference call. For more information about making a conference call, see Making a conference call on page 73.</p>
	Initiate IM	<p>Use this button to begin an IM interaction with a valid IM ID in the adjacent Text input field.</p>
	Transfer Call	<p>Use this button to transfer an active call to a supervisor or an agent in the contact list. For more information about transferring a call, see Transferring a call on page 77.</p> <p>Use this button to transfer an active call to another agent in the contact list. For more information about transferring a call, see Transferring a call on page 77.</p>

Secondary windows

Secondary windows are available as toggle buttons in the action bar. When you click the button, the system displays the corresponding window. When you click the button again, the system closes the window.

The following are the available secondary window buttons:

Button	Name	Description
	Contact List	<p>Use this button to open the Contacts under the Work List window. For more information about managing contacts, see Managing the Contact List window on page 106.</p>

Table continues...

Button	Name	Description
	Dial Pad	Use this button to open the dial pad window. For more information about using dialpad, see Using Dialpad on page 124.
	Work Log	Use this button to open the Work Log window under the work list window. For more information about work log, see Managing the Work Log window on page 115.
	VuStats	Use this button to open the VuStats monitor window. For more information about VuStats, see Managing the VuStats Monitor window on page 122.
	Launch External Applications	Use this button to open an application in the Launch Application panel, if administered . For more information about launch applications, see Managing Launch Application on page 120.

Chapter 3: Getting started

This chapter describes how to log in to Avaya one-X[®] Agent. The procedure to log on depends on the deployment configuration of Avaya one-X[®] Agent in your network and the authentication that the deployment supports.

Avaya one-X[®] Agent supports the following authentication types:

- Basic authentication
- Single Sign-on

Basic authentication

In the basic authentication, the system authenticates user credentials with servers, such as, Communication Manager, Central Management, and Presence Services, if deployed. You must set all credentials of each server in the configuration and profile information.

For Central Management, you must provide the Active Directory credentials to get your profile information where you can store these secondary server credentials. The system attempts to log on using the last used profile. If the agent cannot log on to Central Management, the system uses the previous configuration from the local cache and logs the agent on to Avaya one-X[®] Agent. If the system does not find any configuration, Avaya one-X[®] Agent creates and uses a new default configuration.

Single Sign-on

The Single Sign-on authentication is available with Central Management. You must administer the configuration in both Central Management and Active Directory. Users do not have to enter any credentials to log in to Central Management and get the profile. The system uses the credentials supplied to the user at Windows Domain Network automatically.

This chapter explains how to open Avaya one-X[®] Agent, log in as an extension, register as an agent, and log in to an IM service.

Important:

To start the Single Sign-on authentication, you must configure the Central Management administrator for Avaya one-X[®] Agent.

Note:

Avaya one-X[®] Agent supports the ACCCM 7.0 integration. For more information about administering ACCCM with Avaya one-X[®] Agent, see *Administering ACCCM for Avaya one-X[®] Agent Central Management*.

Logging in to Avaya one-X® Agent

You must register your station with Communication Manager to using the following Avaya one-X® Agent features:

- Configuring your system preferences
- Making or receiving direct calls
- Signing in as an agent

If you or an administrator activated the automatic registration in the System Settings panel, the system logs you in automatically.

If you have installed Avaya IP Agent on your computer, the system processes the Avaya IP Agent information when you log in to Avaya one-X® Agent for the first time. The Avaya one-X® Agent user interface displays the **Import Settings from IP Agent/IP Softphone** dialog box. You can import your log in credentials, contacts, and contact logs.

You can select **Import Login Settings**, **Import Call History**, and **Import Contacts** from the dialog box. Avaya one-X® Agent detects the database file and displays the path for the database file in the **Database File** field. The system displays the selection in the corresponding windows on Avaya one-X® Agent. However, log out of Avaya IP Agent while importing the details.

Avaya one-X® Agent supports the migration of earlier agent profiles. For example, when you open Avaya one-X® Agent for the first time, the system performs the following tasks:

- Processes Avaya one-X® Agent.
- Imports the profile from the earlier Avaya one-X® Agent.
- Stores the agent profile in the newly installed Avaya one-X® Agent profiles.

The application applies the default values of Avaya one-X® Agent for new fields in the migrated profiles.

Before you begin

Before you log in to Avaya one-X® Agent, get the following user credentials from your system administrator:

- Central Management login: user authentication ID and password.
- Agent login: agent login ID, password, and domain name.
- IM login: IM user name, password, domain name, and IP address of Presence Services.

Note:

If you do not have Presence Services installed, you do not require the IM user name, password, and IP address of Presence Services.

For installations without Central Management, you require all credentials except user authentication ID and password.

Procedure

1. From your computer, double-click Avaya one-X® Agent.

The system displays the Welcome window if you are logging in to Avaya one-X® Agent for the first time.

The system uses the configuration settings from your local cache to authenticate the agent details and logs you in to Avaya one-X® Agent. If you have not configured the settings in your system, Avaya one-X® Agent creates a configuration and uses the configuration file as a new default configuration.

The system displays the User Authentication window, if you are not using Single Sign-on. The system authenticates your user credentials against the servers, such as Communication Manager and Central Management, if deployed in your network. The system attempts to log on using the last used profile, if you cannot log on to Central Management. The system uses the previous configuration from your local cache to authenticate the agent and logs you on to Avaya one-X® Agent. If you do not have any configuration in your system, Avaya one-X® Agent creates a configuration and uses the configuration file as a new default configuration.

2. In the User Authentication window, enter your ID and password in the appropriate fields.

 Note:

If you are using Single Sign-on or if Central Management is not part of server installations, you need not perform this step. The system displays the Welcome window after you open Avaya one-X® Agent.

The Welcome window might display a welcome message or an important instruction configured through Central Management, if you installed Central Management as a server component. The system does not provide the option to skip the welcome screen if you are logging in through Central Management.

You can complete the initial configuration with the Welcome window menu, when you log in to Avaya one-X® Agent on your computer for the first time. The initial task might include configuring your agent settings, defining your user profile, or setting the dialing rules. To configure the basic settings, see [Setting up the initial configuration](#) on page 34.

3. On the Welcome window, click **OK**.
 - If you activated the automatic registration settings in the **System Settings** login panel, then the system logs you on to Avaya one-X® Agent automatically.
 - If you did not activate automatic registration settings in the **System Settings** login panel, then the system prompts you to enter the user credentials. You must enter your user credentials for each subsequent login windows.
 - If you have multiple user profiles and have not activated the **Automatic run all logins for the selected profile** option in the **System Settings** login panel, then the system displays the profile selection window with preferred profile on the top of the list. You must select the appropriate profile from the **profile** selection drop-down list to continue.
 - If Avaya one-X® Agent with Central Management, and the administrator has set the preferred profile in Central Management, the system displays the profile selection window with preferred profile on the top of the list. You must choose appropriate profile from the **profile** selection drop-down list to continue.

- Avaya one-X® Agent with Central Management, and the administrator has disabled the local profile administration in Central Management, then the system logs you on to Avaya one-X® Agent automatically with the preferred profile set in Central Management.
4. If you are logging in for the first time, the system displays the Login window. You must perform the following actions:
 - a. In the **Extension** field, type the station extension number.
 - b. In the **Password** field, type the password.
 - c. Click **Log in**.

The system displays the Agent Sign In to ACD window. To make and receive ACD calls, you must log on to the ACD server with the agent ID.

5. On the Agent Sign In to ACD window, perform the following actions:
 - a. Select the **Automatically sign into the ACD server** option, to log automatically as a user on to the ACD after successfully registering the extension with Avaya Aura® Communication Manager.
 - b. In the **Agent** field, enter the agent login ID.
 - c. In the **Password** field, enter the password.
 - d. Click **Log in**.

On connecting successfully, the system displays the Connect to IM Server window. If you entered an incorrect agent ID or password, click **Cancel** to end the session, and repeat Step 5a through Step 5d.

 Note:

The system does not display the Connect to IM Server window, if Presence Services is not a part of the deployment. In such a case, the system logs you in to Avaya one-X® Agent if you or your administrator selected the **Activate IM Presence** option in the IM tab.

6. On the Connect to IM Server window, perform the following actions:
 - a. In the **User Name** field, enter your IM user name.
 - b. In the **Password** field, enter the password.
 - c. In the **Domain** field, enter the IM server domain name.
 - d. Click **Log in**.

The system logs you on to Avaya one-X® Agent.

 Note:

If you log in to Avaya IP softphone, the system displays a warning message. You must log out to import contact logs into Avaya one-X® Agent.

Chapter 4: Setting up the initial configuration

This chapter describes how to configure various settings after logging in to Avaya one-X® Agent.

You can configure multiple profiles, one for each location or type of phone. When Avaya one-X® Agent starts, the user can select the appropriate profile.

Important:

You might not have permission to change, add, delete, or configure some features in Avaya one-X® Agent. At the enterprise level, your administrator might have disabled these features that are visible but unavailable.

Configuring phones for different locations

To perform day-to-day tasks at home or while traveling using the contact center, register Avaya one-X® Agent with Communication Manager.

You can select an appropriate profile to optimize the Avaya one-X® Agent features. If you are working from multiple locations, you must configure Communication Manager on the Avaya one-X® Agent client each time you change locations.

Important:

Avaya has removed the explicit reference to the Communication Manager license type from the configuration parameters in Avaya one-X® Agent. In this release of Avaya one-X® Agent, you can select **User type** and the appropriate license when registering with Communication Manager. In addition, the **Basic** user type, if used in the **Desk Phone** mode, you can select an `AGENT_SC` (the Elite entitlement) license.

Avaya one-X® Agent provides the following options to register with Communication Manager. Depending on your location, telephone set, and network, you can make and receive calls using:

- My Computer
- Desk Phone
- Other Phone

This section provides prerequisites and steps to set up each configuration. To confirm the configuration type, contact your system administrator.

Setting up the My Computer configuration

For the My Computer configuration, you must connect Avaya one-X[®] Agent to Communication Manager for the data path and VoIP for voice path. The My Computer configuration does not require an analog or an IP deskphone, when a physical deskphone is unavailable. You can make or receive calls through Avaya one-X[®] Agent using a headset connected to your personal computer.

The My Computer setting provides the best possible IP audio quality with your connection speed, computer performance, and network setup.

Note:

The My Computer mode is unavailable if Avaya one-X[®] Agent runs on Windows Server 2003 or Windows Server 2008.

Before you begin

You must have:

- A network connection from a computer running Avaya one-X[®] Agent to connect to Communication Manager.
- A network interface card for connectivity to Communication Manager and a full duplex sound card.
- An USB-compliant headset connected to the computer, or a computer microphone and speakers, or a headset with a microphone connected to the mini connectors.
- A deskphone extension number, password, and Communication Manager IP address from your system administrator.

About this task

Use the My Computer configuration to gain access to Communication Manager through the Internet. You can configure the My Computer setting for VoIP either through the Login window or through the System Settings dialog box.

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **System Options > System Settings**.
2. In the **Telephony** tab, perform the following actions:
 - a. Select **Enable automatic connection to Communication Manager** to connect to Communication Manager automatically using the last successful registration.
 - b. In the **Extension** field, type the deskphone extension number for Communication Manager to identify your extension number each time you log in.
 - c. In the **Password** field, type the password for the deskphone extension number.
 - d. Select **Save password during sign in** to save the password when you sign in with the extension number.
 - e. Select **CM Auto Answer Support Required** if your administrator has configured the extension on Communication Manager to support Auto Answer.

- f. Select **Warn for Another User Logged in at Extension** to warn you if another agent has logged in using the same extension.

 Note:

This option is available only for Avaya one-X® Agent 2.0 or later.

- g. In the **Server Address** field, type the IP address of Communication Manager.
 - h. From the **User Type** drop-down list, select the appropriate user type.
 - i. In the **Place and receive calls using** drop-down field, select **My Computer**.
3. Click **OK**.

The system applies the updated changes in the next login.

Related links

[Telephony Login panel field descriptions](#) on page 160

Setting up the Other Phone configuration

If you configure Avaya one-X® Agent with the Other Phone mode, the system registers Avaya one-X® Agent with Communication Manager as an offsite agent through a deskphone and an IP connection. The phone can be a PSTN telephone, a mobile phone, or an extension on a local or remote switch. The Other Phone configuration requires an IP connection to connect to Communication Manager and a PSTN connection to make or receive calls.

Before you begin

You must have:

- A network connection from a desktop computer running Avaya one-X® Agent to Communication Manager.
- A deskphone that can receive calls from the Communication Manager connection. A user connection, one for signaling connection and the other for offsite use, one trunk connection, or for onsite use, another user connection.
- A deskphone extension number, password, and the Communication Manager server address.
- A deskphone number configured as **Other Phone** and added on the **Phone Numbers** panel. For information about adding phone numbers, see [Adding a new telephone number](#) on page 142.

About this task

Use the Other Phone mode when you are telecommuting and you want to use Avaya one-X® Agent from a remote location with a PSTN telephone connected to Communication Manager directly. You can configure the Other Phone setting either through the login window or through the System Settings dialog box.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Login**.

3. In the **Telephony** tab, perform the following actions:
 - a. Select **Enable automatic connection to Communication Manager** for the system to connect to Communication Manager automatically using the last successful registration.
 - b. In the **Extension** field, type the extension number for Communication Manager to identify your deskphone number each time you log in to the system.
 - c. In the **Password** field, type the password for the deskphone extension number.
 - d. Select **CM Auto Answer Support Required** if your administrator has configured the extension on Communication Manager to support Auto Answer.
 - e. Select **Warn for Another User Logged in at Extension** to warn you if another agent has logged in using the same extension.
 - f. In the **Server Address** field, type the IP address of Communication Manager.
 - g. From the **User Type** drop-down list, select the appropriate user.
 - h. In the **Place and receive calls using** drop-down field, select **Other Phone**.
 - i. In the **Telephone at** field, type the telephone number for voice calls.
4. Click **OK** to save the settings.

The system applies the updated changes in the next login.

Related links

[Telephony Login panel field descriptions](#) on page 160

Setting up the Desk Phone configuration

Use the Desk Phone configuration with the Avaya IP deskphones or DCP deskphone for voice path and Avaya one-X® Agent to share control of the same administered station with the same button layout and features. You can gain access to audio components from your office deskphone and visual components from your computer.

Before you begin

You must have:

- A network connection from a personal computer running the Avaya one-X® Agent program to Communication Manager.
- A compatible Avaya IP deskphones that can receive calls from Communication Manager.
- Network Interface Card for connectivity to Communication Manager.
- Deskphone extension number, password, and Communication Manager server address from your system administrator.

About this task

Use the Desk Phone configuration to share the control between the office deskphone and the computer.

While registering a deskphone with Communication Manager, you must register the deskphone number as the extension number. You can configure the deskphone setting either through the login window or through the System Settings dialog box.

Procedure

1. On the top bar of Avaya one-X® Agent, select **System Options > System Settings**.
2. In the **System Setting** dialog box, click **Login**.
3. In the **Telephony** tab, perform the following actions:
 - a. Select the **Enable automatic connection to Communication Manager** option to connect to Communication Manager automatically using the last successful registration.
 - b. In the **Extension** field, specify the extension number for Communication Manager to identify your number each time you log in to the system.
 - c. In the **Password** field, specify the password for the desktop extension number.
 - d. Select the **Save password during sign in** option to save the password when you are signing in with the extension number.
 - e. Select the **CM Auto Answer Support Required** option if your administrator configured the extension on Communication Manager to support Auto Answer.
 - f. Select the **Warn for Another User Logged in at Extension** option for the system to display a warning message if another agent is using the same extension.
 - g. In the **Server Address** field, type the IP address of Communication Manager.
 - h. From the **User Type** drop-down list, select the appropriate user type.
 - i. In the **Place and receive calls using** drop-down field, select **Desk Phone**.

 Note:

You cannot change the settings for this field. The system sets Desk Phone as the setting.

4. Click **OK**.

The system applies the updated changes in the next login.

Related links

[Telephony Login panel field descriptions](#) on page 160

Configuring the agent settings

Before you begin

- Get the agent extension number and password from your system administrator.

About this task

The system does not display the ACD tab if:

- You do not log in as a non-agent.
- Your administrator has configured the appropriate buttons for this extension.

Procedure

1. On the top bar of Avaya one-X[®] Agent, select **System Options > System Settings**.
2. In the Login Settings dialog box, click the **Agent** tab.
3. In the **Agent** tab, perform the following actions:
 - a. Select **Enable ACD Login** to start the ACD feature.
Before you select **Enable ACD Login**, provide the user credentials to log in to the ACD service.
 - b. Select **Automatically sign into the ACD server** to register the extension with the ACD server using the previous registration through the Communication Manager instance.
 - c. In the **Agent** field, specify the extension number for the ACD service to identify the agent extension number each time you log on to the system.
 - d. In the **Password** field, specify the password for the agent extension number.
 - e. Select **Save password during sign in** to save the password when you sign in as an agent with the agent extension number.
 - f. From the **Default Agent state on ACD connection** drop-down field, select the appropriate option.
4. Click **OK**.

Related links

[Agent Login panel field descriptions](#) on page 162

Configuring the IM settings

Before you begin

You must:

- Get your IM user name, password, domain name, and IM server IP address from your supervisor or system administrator.
- Configure the IM configuration on the deskphone.

Procedure

1. On the top bar of Avaya one-X[®] Agent, select **System Options > System settings**.
2. In the Login Settings dialog box, click the **IM** tab.

3. In the **IM** tab, perform the following actions:
 - a. Select **Enable IM Login** to activate the IM feature.
When you select the **Enable IM Login** option, provide the user credentials to log on to Presence Services.
 - b. Select **Enable automatic connection to IM server** for the system to connect to the IM server with the previous successful registration.
 - c. In the **User Name** field, type the IM ID of the agent.
 - d. In the **Password** field, type the password.
 - e. In the **Domain** field, type the domain name of the IM server.
 - f. Select **Save password during sign in** for the system to save the credentials for subsequent log-in attempts.
 - g. In the **Server Address** field, type the IM server IP address.
4. Click **OK**.

Choosing the user type

Avaya one-X[®] Agent supports different types of users, namely, agents, non-agents, and supervisor to gain access to the Communication Manager features. Based on the user type, the system grants access for a particular user type. You can gain access to the features with the corresponding user type, unless your administrator has restricted these features through Communication Manager.

For example, a user authenticated as an **Agent** can gain access to all Avaya one-X[®] Agent features, other than the **Supervisor** feature set. The agent cannot gain access to features, such as Service Observing, Remote Agent Logout, as your administrator has restricted the Avaya one-X[®] Agent features through Communication Manager.

Each user type has a role-based access to the following features:

Feature	Agent	Non-Agent	Supervisor
ACD	Yes	No	Yes
Telephony	Yes	Yes	Yes
IM/Presence	Yes	Yes	Yes
TTY*	Yes	Yes	Yes
Desktop Sharing	Yes	Yes	Yes
Supervisor**	No	No	Yes

* The TTY feature works only in the My Computer mode.

** Avaya one-X[®] Agent integrated features.

! Important:

Avaya has removed the explicit reference to the Avaya Aura® Communication Manager license type from the configuration parameters in Avaya one-X® Agent. In this release of Avaya one-X® Agent, you select **User type** and the proper license when registering with Avaya Aura® Communication Manager. In addition the **Basic** user type, if used in the **Desk Phone** mode, you can select an AGENT_SC (the Elite entitlement) license, and allow IM and Presence.

About this task

Perform the following procedure to select the user type from the Telephony tab.

Procedure

1. On the top bar of Avaya one-X® Agent, select **System Options > System Settings**.
2. In the Login Settings dialog box, click the **Telephony** tab.
3. In the **Telephony** tab, select the appropriate user type from the **User Type** drop-down list.

If your administrator has configured Avaya one-X® Agent with Avaya Aura® Communication Manager, you cannot change the **User Type** field.

Setting up the dialing rules

The dialing rules are based on the dialing codes of the region and the location of Communication Manager. With the dialing rules, the system:

- distinguishes extensions from trunk calls based on the length of the dialing string,
- uses the right Automatic Route Selection (ARS) code, and
- modifies the digits with Communication Manager, and the PSTN requirements, if needed.

Avaya one-X® Agent supports the authorization and carrier code, which is mandatory in some countries. The authorization and carrier code is an optional feature to prevent unauthorized users from gaining access to expensive telephony resources. You or an administrator can enter the authorization and carrier code and the types of deskphone calls that require this authorization in the user profile. Avaya one-X® Agent appends the authorization code as required so that you need not enter the authorization code each time you make a call.

+ Tip:

If are a traveling agents, you must register with a different Communication Manager instance. You must define the user profile with appropriate dialing rules for location and use the login with the profile so that the dialing rules for the system do not change.

*** Note:**

You must change the dialing rules each time you register the deskphone settings with a different Communication Manager instance.

Procedure

1. On the top bar of Avaya one-X[®] Agent, select **System Options > System Settings**.
2. In the System Settings dialog box, click **Dialing Rules**.

The system displays the **Dialing Rules** panel with **Basic** and **Advanced** tabs.

3. In the **Basic** tab, perform the following actions:
 - a. In the **Number to dial to gain access to outside line** field, specify the number to gain access to an outside line. For example, if you are in North America, you must type the number as 9 to gain access to the outside line.
 - b. In the **Your Country Code** field, specify the country code of Communication Manager. For example, type 1 for North America, 44 for Great Britain, and 61 for Australia.
 - c. In the **Local Calling Area Code** field, type the area or city code of Communication Manager. For example, type 785.

In regions that support multiple local calling area codes, type the area code and use comma to separated the codes. For example, type, 305, 720 if you can make local calls to both these area codes.

- d. In the **Number to dial for long distance calls** field, enter the national long distance prefix, for example, in North America, type 1.
- e. In the **Number to dial for international calls** field, type the international prefix, for example, in North America, type 011.
- f. In the **Extension Length for internal extension calls** field, type the length of the internal extension calls. For example, if your internal extensions consist of five digits, enter 5. If you specify multiple extension lengths, Avaya one-X[®] Agent performs the exact match.

When you assign the length of the internal extension number, Avaya one-X[®] Agent treats the dialed number as an internal extension.

Communication Manager might have extension numbers with multiple lengths. For example, if your company supports internal three-digit, five-digit, and seven-digit extensions, type 3, 5, 7. Use a comma to separate the values.

- g. In the **Length of national phone numbers (including City/Area code)** field, type the length of the national long distance number. For example, for North America, type 10.

If you are gaining access to a Communication Manager instance where the region supports variable national phone numbers, specify the length of the valid telephone numbers and use a comma to separate the numbers. For example, if the region supports both telephone numbers with 10 digit and 11 digit telephone numbers, type 10, 11.

- h. Select **Include area/city code when making a local call** if the system must prefix the area code to a number when making a local call. For example, if you dial a deskphone number, the system prefixes the area code number defined in the **Your Area/City Code** field and dials the deskphone number.

- i. Select **Add long distance prefix on local calls** if the system must add the long distance code before local calls. For example, if you dial a local telephone number, the system prefixes a long distance code number defined in **Number to dial for long distance calls**, and dials the local telephone number.
 - j. Select **Display confirmation window before dialing a number** if the system must confirm before dialing a number.
 - k. In the **Time Period of Pause (Comma) in dialing (in seconds)** field, specify the period for each comma character in the dialing field before dialing the next digit. By default, this field is set to 2 seconds. You can specify any value between 1 to 10 seconds.
4. To specify the authorization code, click the **Advanced** tab and perform the following steps:
 - a. Select the **Enable Authorization code** option for the system to begin the authorization code. The administrator must configure these codes in Communication Manager.
 - b. In the **Authorization Code** field, specify an authorization code number.
 - c. To make external calls using the authorization code, select one or all following options, as appropriate:
 - To make local calls using the authorization code, select **On local calls**.
 - To make national long distance calls using the authorization code, select **On national long distance calls**.
 - To make international calls using the authorization code, select **On international calls**.
 5. Click **OK** to save the settings.

Related links

[Dialing Rules field descriptions](#) on page 177

Defining the alternate server address

An alternate server is a secondary server which Avaya one-X® Agent uses if the primary server fails. If the primary server fails after logging in, Avaya one-X® Agent and the deskphone change to the secondary server automatically. Although, the secondary server is an optional configuration, you must configure the secondary server for Avaya one-X® Agent.

Note:

This feature is independent of the Alternate Gatekeeper function available in Communication Manager. Communication Manager computes the Alternate Gatekeeper List (AGL) at each registration and provides AGL to the endpoint during a successful Registration, Access, Security (RAS) process. The Alternate Server feature, on the other hand, provides a successful RAS session.

Before you begin

Get the alternate server addresses from your administrator.

Procedure

1. On the top bar of Avaya one-X® Agent, select **System Options > System Settings**.
2. In the System Settings dialog box, click **Alternate Server List**.
3. In the **Alternate Server List** panel, perform the following actions:
 - a. Click **Add**.
 - b. In the blank field, type the IP address of the secondary server.
To add more servers to the list, repeat the sub steps a and b.
 - c. In the **Maximum attempts of each server** field, type the number that the system must try to connect to next server.
4. Click **OK**.

Configuring the Work Handling options

With the Work Handling option, you can configure how you want to receive calls on Avaya one-X® Agent.

About this task

Use the Work Handling options to:

- Configure the incoming work items.
- Use the Communication Manager settings to change the agent status, if administered.
- Define the agent transition state after releasing the call.
- Set the work completion options.

Note:

The Work Handling settings do not work for station calls, outbound calls, missed calls, and IM interactions.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Work Handling**.
The system displays the **Work Handling** panel with the **Basic** and **Advanced** tabs.
3. In the **Basic** tab, perform the following actions:
 - a. In the **Work Completion for ACD calls** section, define the work completion mode.
 - b. In the **Transitions to Ready State** section, define the agent transition state after you release the call.
The **With Aux Code** option is only available for the **Manual-Ready** option.

4. In the **Advanced** tab, perform the following actions:
 - a. In the **Work Items** section, select the appropriate option to accept incoming work items.
 When you set the option to **Auto-Accept**, the system accepts calls automatically. The Auto-Accept option is not the same as the **CM Auto Answer Support Required** option on the Login window. However, the **CM Auto Answer Support Required** option provides the same functionality on the client side.
 - b. In the **Communication Manager Ready mode** section, select **Auto In** for Communication Manager to perform the work handling. If you select **Auto In**, the system disables the Work Handling panel settings.
 Do not use this function for the normal operation of Avaya one-X® Agent.
5. Click **OK**.

Related links

[Work Handling panel field descriptions](#) on page 164

Configuring the incoming call appearance

About this task

Use the following procedure to set the incoming call notifications for the system to displays the main window or to flash the icon on the task bar for an incoming call.

Procedure

1. On the top bar of Avaya one-X® Agent, select **System Options > Agent Preferences**.
2. In the Agent Preferences dialog box, click **Call Handling**.
3. In the **Call Handling** panel, use any of the following options:
 - Select **Consultative Transfer** to consult with the second caller before you transfer the call.
 - Select **Consultative Conference** to consult with the second caller before you add the first caller to the conference.
 - Select **Auto-Hold** for the system to perform any of the following:
 - Put the call on hold automatically before you transfer.
 - Establish a conference the call.
 - Answer another alerting call.
 - Dial another outbound call.
 - Select **Bring main window to front** for the system to bring the main window to the foreground and start the window for a ringing call and display the window for any incoming call.

- Select the **Flash** icon for the system to displays the icon in the task bar to indicate an incoming call.
4. Click **OK** to save the settings.

Related links

[Call Handling panel field descriptions](#) on page 157

Configuring the incoming Instant Message appearance

About this task

You can set the messages that the system can send automatically as as greetings when you begin the IM interaction or respond to an instant message. Using the **Add Response** button on the IM window, you can set the messages that the system can send.

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **System Options > Agent Preferences**.
The system displays the Agent Preferences dialog box.
2. In the Agent Preferences dialog box, select **Instant Messaging**.
The system displays the Instant Messaging panel with the **General**, **Alerts**, and **Responses** tabs.
3. Click the **General** tab and perform the following actions:
 - a. In the **Greeting** field, type the IM greeting.
 - b. Select a value from the **Minutes** drop-down list.
When you set the value, the system displays the status as *Away* when the system is in the idle status. The default value is 15 minutes.
 - c. Select **Allow desktop sharing** to start desktop sharing.
4. Click the **Alerts** tab, and perform the following actions:
 - a. Select **Display main window** to view the main Avaya one-X[®] Agent window on the foreground for an incoming message.
 - b. Select **Display IM window** to view the incoming message directly in the IM window.
 - c. Select **Flash icon** to view the one-X Agent icon on the task bar for an incoming message.
5. Click the **Responses** tab to set the automated IM response and perform the following steps:
 - a. Click the plus button (+) button.
 - b. Double-click the Untitled box and type the text for the automated IM response.
 - c. Repeat sub steps a and b to add more IM responses.

- d. To use the IM responses, click **Add response** on the IM window, select the IM response, and press **Enter**.

You can record multiple responses, and use the recorded responses during your IM interaction.

6. Click **OK** on the Instant Messaging panel to save the settings.

Configuring the incoming TTY appearance

About this task

Use this procedure to define the incoming TTY call appearance. You can also set an automated response for the incoming TTY message and specify the originating numbers for TTY message window to appear.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > Agent Preferences**.

The system displays the Agent Preferences dialog box.

2. On the Agent Preferences dialog box, select **TTY**.

The system displays the TTY panel with **General** and **Abbreviations** tabs.

3. On the **General** tab panel, perform the following actions:

- a. In the **Greeting** text box, type the agent greeting. By default, the system displays the **Hello GA** greeting.

- b. Select **Show TTY window on every voice call** for the system to display the TTY window for every incoming voice call.

- c. Perform the following actions for the system to display the TTY window for specific incoming voice calls:

- a. Select **Show TTY window when a call comes from**.

The system activates the TTY number field.

- b. Click the plus button (+).

The system displays an untitled item in the TTY number field.

- c. Double-click the untitled item and specify the number for which the system must display the TTY window.

- d. Select **Always show TTY button in Voice interaction** for the system to display the TTY window for the voice work item on the work list window.

This option is useful if the agent performs TTY operations, which include incoming and outgoing TTY message.

4. On the **Abbreviations** tab, perform the following actions:

- a. To view the preset TTY abbreviations, select any abbreviation in the list.

The **Meaning**, **Literal Meaning**, and **Description** fields display the abbreviation corresponding to TTY.

- b. To add a new abbreviation, perform the following actions:

- a. Click the **+** button.

The system displays an untitled abbreviation in the TTY list.

- b. Double-click the untitled abbreviation and enter the TTY abbreviation.

- c. In the **Meaning** field, enter a short explanation.

- d. In the **Literal Meaning** field, enter the expansion of the abbreviation.

The Literal Meaning is a literal text, for example, a short form for “Be Right Back” can be “BRB” and “Go Ahead” can be “GA”.

- e. In the **Description** field, type more description or information about the abbreviation.

 Note:

Use of these fields are optional.

The system displays the abbreviations in rectangular boxes on the TTY window. To view the abbreviation details, you must click the abbreviation box on the TTY window. A pop-up window displays the details. The recipient can also view the same details if the administrator has configured the same abbreviation and details through the Avaya one-X[®] Agent.

5. Click **OK** to save the settings.

Setting up the audio options

About this task

Use the following procedure to set the audio options to adjust the audio volume for playback, recording, and incoming calls. You can also set the system to play a ring tone through the computer speaker and select a ring tone for an incoming call.

Procedure

1. On the top bar, click **System Options > Agent Preferences**.
2. In the Agent Preferences dialog box, click **Audio**.
3. In the **Basic** tab, perform the following steps:
 - a. Adjust the **Playback** slider to set the volume for all sound output through your computer speakers or headphones.

- b. Adjust the **Record** slider to set the recording volume of all sound transmitted through a microphone to your personal computer.
- c. Select the **Mute** option next to the **Record** slider to eliminate any sound sent to your computer through the microphone.

These settings do not affect the headset volume if the headset is attached to a deskphone instead of the computer.

*** Note:**

The **Playback**, **Record**, and **Mute** are only available only in the My Computer mode. For Desk Phone or Other Phone modes, you cannot control the volume of the deskphone.

- d. Adjust the **Ringing** slider to set the volume of the sound played through the speakers or headset when you receive a call.
- e. Select the **Play ringing through the internal computer speakers** option to play the sound associated with an incoming call through the speakers of the personal computer and the headset simultaneously.

If your computer does not have an internal speaker, this option does not apply.

- f. Select the **Enable Sidetone** option to start the sidetone.
- g. Select the **Use Custom ringtone** option to play the custom ring tone through the speaker or headset when you receive an incoming call. The system plays the wave file from the specified location.

When you select **Use Custom ringtone**, the system displays the **Browse** field and **Test Ringtone** button. Use the **Browse** field to locate the wave file and click **Test Ringtone** to test the wave file.

4. In the **Advanced** tab, perform the following steps in the **Audio Devices** section to set the advanced audio settings:
 - a. From the **Playback Device** list, select the audio play back hardware on the local system.
 - b. From the **Record Device** list, select the audio recording hardware on the local system.
 - c. Use the **Transmit Gain** slider to set the gain for outgoing sound during a call. You can set the value from 0.1 to 10.0. You can set the optimum value to 0.35.
 - d. Use the **Receive Gain** slider to set the gain for incoming sound during a call. You can set the value from 0.1 to 100.0. You can set the best value to 1.00.
 - e. Click **Background Noise Test** to test the background noise.

The system displays the Background Noise Test window. Click the **Test** button on that to test the background noise and perform the test if the environment noise level change, or you move to a different location.

5. Click **OK** to save the audio settings.

Related links

[Audio Basic tab field descriptions](#) on page 152

[Audio Advanced tab field descriptions](#) on page 153

Defining an agent profile

A profile is a collection of preconfigured settings and preferences. With profiles, agents can change configurations by reusing the same Avaya one-X® Agent installation.

Avaya one-X® Agent supports the migration of earlier Avaya one-X® Agent agent profiles if you are using local profiles. When you start the Avaya one-X® Agent program for the first time, the application performs the following tasks:

- Imports the profile from the earlier Avaya one-X® Agent release.
- Stores the profile in the Avaya one-X® Agent profiles.
- Applies the default values of the Avaya one-X® Agent release for new fields in the migrated profiles.

About this task

Use the following procedure to create a local agent profile.

Important:

The Profile configuration is available for creating local profile without performing the Central Management administration. If your administrator has configured Avaya one-X® Agent with Central Management, the system disables the profile window.

Procedure

1. Make the necessary changes in the **System Settings** and **Agent Preferences** options.
2. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
3. In the System Settings dialog box, click **Profiles**.
4. In the **Profiles** panel, perform the following actions:

- a. Click **Add**.

The system displays the Create Profile dialog box.

- b. In the **Profile Name** field, enter the name for the profile and click **OK**.

The system displays the new profile in the Profile list.

5. Click **Automatically execute all logins for the selected profile** to begin all login sequences for the selected or current profile without displaying the profile selection dialog box. The sequence depends on the login option, that is, manual on one parameter or automatic on other parameters that is displayed in the login panel.

If you do not select this option and if you have multiple profiles, the system provides you with options to select the profile from the list. You must select the appropriate profile when you

start. If you have a single profile, the program continues without displaying the profile selection window.

6. Click **OK**.

The system creates a new profile and stores the profile locally in the computer.

You can change the settings in the configuration parameters for the new profile in the next login.

Related links

[Profiles panel field descriptions](#) on page 180

Integrating the voice mail system

Avaya one-X® Agent provides the Communication Manager Message Waiting support for the registered extension and grants access to the message retrieval system for Voice mail. You can integrate the voice mail system with a deskphone system, a third-party voice mail program, or a web-based voice mail server, and retrieve your voice mail from one of the voice mail services.

Important:

The voice mail service is available only for the registered extensions and that have a Message Waiting Light defined. If voice mail settings are unavailable on your extension, contact the system administrator. This instance is specific to Message Waiting Light, and not with the voice mail system that activates this light.

Before you begin

Voice Mail Integration is only available for those extensions that have a Communication Manager Message Waiting Lamp.

The voice mail support is only available for the Message Waiting Light of the registered extension. You do not have automatic support for other buttons translated as Message Waiting for other extensions.

About this task

You can associate the voice mail messages with a deskphone, a application, or a Web browser.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Voice mail Integration**.
3. In the **Voice Mail Integration** panel, click **Enable Message Access**.
4. To integrate voice mail service, perform one of the following actions as appropriate:
 - To integrate voice mail services with a deskphone, select **Dial this number** and specify the voice mail number in the field.

- To integrate voice mail services through a third-party voice mail application, select **Start this program** and click **Browse** to navigate to a windows executable file.
- To integrate voice mail with a third-party web server, select **Open on web** and type a valid address in the field.

5. Click **OK**.

Related links

[Accessing your voice mails](#) on page 99

[Voice Mail Integration panel field descriptions](#) on page 175

[Voice Mail Integration panel field descriptions](#) on page 175

Activating a recorded greeting

You must activate the Record Greetings option for the system to play the greeting. You can active more than one greeting simultaneously.

For example, you can activate multiple greetings if each greeting has a unique Vector Directory Number (VDN) as the activation criterion. You can activate multiple greetings for agent greetings that play for specific Automatic Number Identification (ANI) deskphone numbers or Prompted Digits.

If two recorded greetings meet the same criteria that make greetings eligible for a single call, Avaya one-X® Agent chooses the first one on the search list.

Before you begin

Ensure that the system has at least one recorded greeting.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, select **Greetings Triggers**.

The system displays the **Greetings Triggers** panel.

3. In the **Greetings Triggers** list, select a greeting.
4. Click **OK**.

You can manually play the selected greeting for the incoming call.

Related links

[Greetings Triggers panel field descriptions](#) on page 166

[Setting Greeting Triggers activation criteria](#) on page 131

[Recording an agent greeting](#) on page 129

[Record Greetings panel field descriptions](#) on page 157

Reason codes overview

Avaya one-X® Agent supports the following three classes of reason codes:

- Aux
- Agent logout
- Work code

You can make the annotations for these reason codes to the call record and Agent Logout Reason Codes. These reason codes are digit strings in Communication Manager. With reason codes, you can associate more meaningful text strings to the digit strings for easy reference.

Use reason code to associate a particular number to a label when agents are either not present at the workstation or do not want to accept the ACD call. These reason codes appear on the message window when an agent changes the work status to auxiliary or logs out from the ACD service. By default, the system creates a default reason code each for auxiliary, logout, and work reason code types. You can change the default reason codes, but cannot delete reason codes.

Important:

The system administrator must define and manage a common set of reason codes. The administrator can distribute these reason code files to all agents by pushing the configuration to the system of the agent.

Besides, if your deployment uses Central Management, the administrator must upload a Comma Separated Value (CSV) file. The administrator must also assign common reason codes across the account or the agent skill.

Note:

To administer reason codes, use the two-digit reason code in Avaya one-X® Agent. For example, specify the reason code as 01,02,03.

Defining reason codes for a work item

Work codes are codes that you assign to a work item in the Work List window. You must define the work code to use the work code in the Work List window.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the left pane of the System Settings dialog box, click **Reason Codes**.

The system displays the Reason Codes panel on the right.

3. From the **Select menu to edit** drop-down list, select **Work Reason Codes**.

The system displays an untitled reason code item in a **root** node under the **Select menu to edit** list.

You can add a single work reason code or create a group and add a set of work reason codes for the group. The system organizes the reason codes having similar or related characteristics in one group. Ensure that the labels assigned to the group are easy to understand the group activity.

4. To add a group, perform the following actions:

- a. Click the **Add Reason Group** button at the bottom of the Reason Codes panel.

The system adds an untitled group node in the container below the **Select menu to edit** list.

- b. Select the untitled node and specify the group name.

The system assigns the group node with the name you type.

5. To add a reason code, perform the following actions:

- a. Select the node to add a reason code.

The node can be the **root** node or a group node.

- b. Click the **Add Reason Code** button.

The system displays an untitled reason code with a number.

- c. Click the numeric code, specify a two-digit reason code, and specify a name to the untitled reason code. For example, `01:Closing the work item`.

The system replaces the name of the reason code with the default name of the reason code item.

6. Click **OK** to save the settings.

In the previous procedure, when you click **Work Code** on an active call on the Work List window, the system displays the work codes. You can select the appropriate code to assign during the active call. If you do not create any work code, the **Work Code** icon remains disabled during an active call. Communication Manager supports Work Code of maximum of 16 digit length.

 Note:

You must define reason codes from Central Management. You cannot edit reason codes from Avaya one-X[®] Agent.

Related links

[Reason Codes panel field descriptions](#) on page 175

Defining log out reason codes

The log out reason code specifies the reason for logging out from the ACD service. You can use the log out reason code only if you have defined reason codes in the System Settings dialog box. Communication Manager supports the log out reason code of a single digit.

Procedure

1. On the top bar of Avaya one-X® Agent, select **System Options > System Settings**.
2. In the left pane of the System Settings dialog box, click **Reason Codes**.

The system displays the Reason Codes panel on the right.

3. From the **Select menu to edit** list, select **Log Out Reason Codes**.

The system displays an untitled reason code item in a **root** node under the **Select menu to edit** list.

You can add a single log out reason code or create a group and add the log out reason codes for this group. The system organizes the reason codes with similar or related characteristics in one group. Ensure that the group labels are easy to understand the group activity.

4. To add a group, perform the following actions:
 - a. Click **Add Reason Group** at the bottom of the **Reason Codes** panel.
The system adds an untitled group node in the container under the **Select menu to edit** list.
 - b. Select the untitled node and specify the group name.
The system assigns the node to the group node.
5. To add a single log out reason code, perform the following actions:
 - a. Select the node to add the log out reason code.
The node can be the **root** node or a group node.
 - b. Click the **Add Reason Code** button.
The system displays an untitled log out reason code with number.
 - c. Click the numeric code, specify a two-digit reason code, and specify a name. For example, `01:Out for lunch`.
The system replaces the default name of the log out reason code name with the name of the log out reason that you specify.
 - d. Repeat Step 5 to add log out reason codes.
6. Click **OK** to save the settings.

The system displays the newly created log out reason code in the **Log Out** list of the **Change Agent State** drop-down list.

Related links

[Reason Codes panel field descriptions](#) on page 175

Defining reason codes for auxiliary

The auxiliary reason code provides the description of the reason for changing the state to the AUX mode. You can use the auxiliary reason code only if you defined the reason codes in the System Settings window. Communication Manager supports single or two-digit auxiliary reason code based on configuration on how Communication Manager is configured.

In Avaya one-X[®] Agent, your administrator can configure the aux-work buttons at any location on the Station page of Communication Manager. Your administrator can activate or deactivate the two-digit reason code on the System-parameters features page in Communication Manager. The following are the conditions for aux-work buttons to work:

- If you press the aux-work without the reason code button, then Avaya one-X[®] Agent displays a prompt.
- If your administrator activated the Two-Digit Aux Work Reason Codes value on Communication Manager and if you click the aux-work without reason code button, then the system displays the ENTER ONE OR TWO DIGIT REASON CODE message on Avaya one-X[®] Agent. You must enter a two-digit reason code on the Avaya one-X[®] Agent main window. The system waits for 10 seconds to accept the reason code.
- If you configured the multiple reason codes on **System Settings > Reason Codes** panel and if you select the aux reason code on the Avaya one-X[®] Agent main window through Change Agent State that has reason code length of more than two digits, the Avaya one-X[®] Agent displays an error message.
- If your administrator disabled the Two-Digit Aux Work Reason Codes values and if you press the aux-work without reason code button, then the system displays the ENTER ONE DIGIT REASON CODE message on the Avaya one-X[®] Agent main window. You must enter a single digit reason code on the Avaya one-X[®] Agent main window.
- If you configured multiple reason codes on **System Settings > Reason Codes** and if you select the aux reason code on the Avaya one-X[®] Agent main window through “Change Agent State” that has reason code length of more than one digit, then Avaya one-X[®] Agent displays an error message.

The reason code settings and the corresponding changes in the system are as follows:

- If you set the aux-work reason code type to **Forced** and you do not enter any reason code, Avaya one-X[®] Agent stays in the previous agent state.
- If you set the aux-work reason code type to **Requested** and you do not enter any reason code, then Communication Manager assumes the state as blank and moves the agent to the aux state.
- If you set the aux-work reason code type to **None** and you do not enter any reason code, then Avaya one-X[®] Agent moves the agent state to the Aux state.

About this task

Use the following procedure to define the auxiliary reason codes and to associate the codes with the numeric reason codes supported in Communication Manager.

Procedure

1. On the top bar of Avaya one-X® Agent, select **System Options > System Settings**.
2. In the left pane of the System Settings dialog box, click **Reason Codes**.

The system displays the Reason Codes panel on the right.

3. From the **Select menu to edit** list, select **Aux Reason Codes**.

The system displays the default and untitled reason code item in the **root** node under the **Select menu to edit** list.

You can add a single auxiliary reason code or create a group and add auxiliary reason codes for the group. The system organizes reason codes having similar or related characteristics in one group. You must ensure that the group labels define the groups activity clearly.

4. To add a group, perform the following actions:

- a. Click **Add Reason Group** at the bottom of the Reason Codes panel.

The system adds an untitled group node under the **Select menu to edit** list.

- b. Select the untitled node and specify a group name.

The system assigns the name to the group.

5. To add a reason code, perform the following actions:

- a. Select the node to add a reason code.

This node can be the **root** node or a group node.

- b. Click the **Add Reason Code** button.

The system displays an untitled reason code with a number.

- c. Click the numeric code and specify a two-digit reason code, and specify a name to the untitled reason code. For example, 01:Out for lunch.

The system replaces the reason code name with the default name of the reason code item.

6. Click **OK** to save your settings.

The system displays the newly created auxiliary reason code in the **Auxiliary** list of the **Change Agent State** drop-down list.

Related links

[Reason Codes panel field descriptions](#) on page 175

Enabling the deskphone display on the main window

You can view a 40-character display at the bottom of the Work List window from a Communication Manager instance. You can view both call related and non call related information, including call prompting digits, VuStats data, the local date, and time display from the ACD server.

*** Note:**

Only the deskphones with 80 characters display are compatible with this feature.

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **Agent Preferences > User Interface**.
2. In the User Interface panel, select the **Show Phone Display** option.
3. Click **OK**.

Related links

[User Interface panel field descriptions](#) on page 158

Configuring the toolbar buttons on the main window

With Toolbar, you can gain quick access to the Avaya one-X[®] Agent settings. The toolbar consists of buttons to:

- Release a call.
- Change the answer settings to manual or auto.
- Change the agent status to ready or auxiliary.
- Make a call to the supervisor directly.
- Assign a work code to the work item.
- Dial the last called number.

These buttons are the same buttons that you have defined as Favorites in the dialpad. When you define buttons, the buttons appear in both Favorite and dialpad. You need not add the buttons twice.

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **Agent Preferences > User Interface**.
2. In the User Interface panel, perform the following actions:
 - a. Click **Display Button Toolbar**.
 - b. Click **Select Favorite Buttons**.
 - c. In the Favorite Buttons dialog box, select the appropriate buttons.

You can select up to eight buttons from the list.
3. Click **OK**.

Related links

[User Interface panel field descriptions](#) on page 158

Chapter 5: Handling phone calls

The calls that you handle in the My Computer mode is different from the calls that you handle in the Desk Phone mode.

Note:

Each contact center must evaluate the configuration and instruct agents on the best practices to handle calls with Avaya one-X[®] Agent.

Avaya one-X[®] Agent integrates with the deskphone to share the control of telephony and agent features. You must perform all call operations from the Avaya one-X[®] Agent interface. However, if Avaya one-X[®] Agent cannot handle calls, you can use the deskphone to perform call operations. You can copy the voice interaction details of remote caller, such as user name and deskphone number by pressing the **Ctrl +C** button on the keyboard.

This chapter describes procedures to handle deskphone calls for different settings. The chapter includes:

- Answering a call
- Transferring a call
- Conferencing a call
- Putting a call on hold
- Muting a call
- Making call
- Ending a call

In Windows 7 and later, Avaya one-X[®] Agent supports the Hibernation or Sleep feature if your administrator left the **Forced Logout Time** field blank in Communication Manager and you logged in as a station or an extension in Communication Manager.

The following are the scenarios where you use Avaya one-X[®] Agent and the computer goes in to the Hibernation or Sleep mode:

- If you are running Avaya one-X[®] Agent and the computer goes in to the Sleep or Hibernation mode, then Avaya one-X[®] Agent goes in to the recovery mode. Communication Manager continues to restore the connection with Avaya one-X[®] Agent for up to seven minutes. If the Hibernation or Sleep mode exceeds the specified time, Communication Manager logs you out from the system. When you wake the computer from the Hibernation or Sleep mode, the system tries to restore the connection between Avaya one-X[®] Agent and Communication Manager and logs you back in to Communication Manager.

- If you are on a call with a customer in the My Computer mode and if the computer goes in the Sleep or Hibernation mode for 10 minutes, then the system disconnects the customer call. When you wake the computer from the Hibernation or Sleep mode, the system attempts to restore the connection between Avaya one-X® Agent and Communication Manager and logs you back in to Communication Manager.
- If you are on call in the Other Phone mode and if the computer goes in the Sleep or Hibernation mode, the system maintains the voice path. Avaya one-X® Agent continues to run in the computer in the background. When you wake the computer from the Sleep or Hibernation mode, the system establishes the call.

Call answering

You can answer both ACD and direct calls using Avaya one-X® Agent. ACD calls occur when a customer dials a number to the contact center and the ACD server routes the call to the agent extension number. Direct calls occur when you receive a call at the station extension number from extensions within the contact center or from outside the contact center through Communication Manager.

You can answer ACD calls and direct calls manually or automatically. The following sections explain the procedures to answer calls in different modes.

Answering a call manually

Answering a call manually is similar to lifting the deskphone receiver when the telephone rings. In Avaya one-X® Agent, you must press the answer button on the program or physically go-off hook, depending on your deskphone settings, when the system receives an incoming call.

Before you begin

You must have:

- Set the Work Item status to Manual-Accept.
- Signed in as an agent for ACD calls.
- Set Agent Status to Ready for ACD calls.
- A USB headset with microphone for the My Computer configuration.
- A deskphone for the Desk Phone configuration.

Procedure

1. When the system receives an incoming call, the Avaya one-X® Agent application displays the caller information on the Work List window.

If the caller information is present, the system retrieves the details and displays the information on the Work List window or on the deskphone display.

2. Answer the call by performing any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, click **Answer**.
- If you are using the Desk Phone configuration, go off-hook.
- If you are using the Other Phone configuration, click **Answer** or go off-hook.

The system creates a new work item in the Work List window.

Related links

[Work Handling panel field descriptions](#) on page 164

Answering a call automatically

You do not have to perform any action manually to accept an incoming call. When the system receives an incoming call, the system generates a short ringing tone to indicate the call.

Avaya one-X® Agent supports the following methods for automatically accepting calls:

- Auto Accept calls that Avaya one-X® Agent supports. An agent must set the work item to Auto-Accept
- Auto Answer that Communication Manager administers. An agent must administer the extension in Communication Manager to deliver the call directly to an off-hook extension without sending any ring

If you are not using either of these two methods with the Other Phone mode, you or your administrator must administer Permanent Service Link in Communication Manager.

Related links

[Work Handling panel field descriptions](#) on page 164

Auto Answer in Avaya one-X® Agent

Before you begin

You must have:

- Set the Work Item status to Auto-Accept.
- Set the Agent Status to Ready for ACD calls.
- Signed in as an agent to accept ACD calls.
- An USB headset with microphone for the My computer configuration.
- A deskphone for the Desk Phone configuration.

About this task

Use the following procedure if you set the answer setting to Auto Accept of Work Item in Avaya one-X® Agent.

Procedure

1. On receiving the call, the deskphone and the computer generate a brief ringing tone.

When Avaya one-X® Agent receives this incoming call, the system displays the caller information in the Work List window. If the caller information is present in the system, the system automatically retrieves the caller details and displays the details in the Work Item window or on the deskphone display panel. If the system cannot find the contact, then the contact displays as `Unknown`.

2. Avaya one-X® Agent answers the call automatically for the agent:

- If you are using the My Computer configuration, the USB headset becomes active
- If you are using the Desk Phone configuration with a headset, the headset becomes active. If the headset is unavailable, the speaker deskphone becomes active. To use the handset, you must go off-hook.

Avaya one-X® Agent creates a new work item in the Work List window. The work item remains in the Work List window throughout the call session.

3. If you are using the Desk Phone configuration, do not return the headset to the cradle or unplug the headphone for the rest of the shift. If you do so, the system logs you out of ACD.

*** Note:**

If you cut the call off or go on-hook accidentally, Communication Manager allows the deskphone ring when Communication Manager has a call to deliver. You must answer the call by picking up the deskphone receiver.

4. If you put the deskphone receiver on the cradle or unplug the deskphone headset for the rest of the shift, the system logs you out of ACD.

*** Note:**

If you accidentally cut the call off or go on-hook, Communication Manager allows the deskphone ring when it has a call to deliver. You must answer the call by picking up the deskphone receiver.

Auto Answer in Communication Manager

Before you begin

You must have:

- Set the Work item status to Manual-Accept.
- Enabled the support for Communication Manager Auto Answer on the login screen.
- Administered the extension for Auto Answer on Communication Manager.
- Agent Status, login, and USB headset are the same.
- An USB headset with microphone in the My computer mode.
- A deskphone handset for the Desk Phone configuration.
- A deskphone for the Shared Control mode.

Procedure

1. When a call arrives, the deskphone provides a zip tone.

When the system recognizes an incoming call, the system displays the caller information on the Work List window. If the caller information is present in the system, the system

automatically retrieves the caller details, if available and displays the details in the Work Item window or on the deskphone display panel. If the system cannot find the contact, then the contact displays as `Unknown`.

2. You must answer the call by performing any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, the call is immediately active on your computer USB headset.
- If you are using the Desk Phone configuration, the deskphone handset will already off-hook or you have a headset plugged in to the deskphone, use the deskphone handset to answer the call.

Avaya one-X® Agent creates a new work item in the Work List window. The work item remains in the Work List window throughout the session.

3. Answer the call.

Avaya one-X® Agent creates a new work item in the Work List window. The work item remains in the Work List window throughout the session.

Answering a call (Auto Answer with permanent service link)

If you are using the Other Phone configuration, you must first establish a Permanent Service Telecommuter Service link so that the system PERFORMS an automatic action to establish a talk-path.

Before you begin

You must have a deskphone handset for the Other Phone configuration.

About this task

Use the following procedure if you have set auto answer calls with the permanent service link in the Other Phone mode.

Procedure

1. Log on to the ACD server.
Communication Manager makes a trunk call to your Other Phone.
2. Answer the call and stay off hook on the Other Phone for the entire session.
3. Use the controls in Avaya one-X® Agent to disconnect any subsequent incoming call.
4. Follow the steps described in the Answering a call (Auto Answer in Communication Manager) section.

Making a call

You can make calls to a customer outside the contact center or to contacts in the enterprise.

*** Note:**

Before making a call, set the dialing rules for Communication Manager. For more information, see [Setting up the dialing rules](#) on page 41.

You can make calls following:

- The Contacts window
- The Contact Log window
- The Speed Dial list
- The Favorite lists
- The text input field

*** Note:**

The system does not display the Transfer, Conference, and Hold buttons unless the remote party answers the call.

Making a call from the Text Input field

About this task

Use the Text Input field to make quick calls to a contact or a known deskphone number.

Procedure

1. On the action bar of Avaya one-X® Agent, click **New Work > New Call**.
2. In the **Text Entry** field, type the contact name or a valid deskphone number.
3. Click **Initiate Call** or press `Enter`.

If you activated the **Display confirmation window before dialing a number** option in the Dialing Rules panel, the system displays the Call confirmation window.

*** Note:**

The Transfer, Conference, and Hold buttons do not appear in the work item unless the called party accepts the call.

4. If you are making a call through a deskphone,
 - In the Desk Phone mode, the deskphone forces off hook on the speaker phone, or if you have a headset already in the off hook state. To use the handset, lift the handset. Your deskphone rings before the destination deskphone answers and dials a call to the number specified in the field.
 - If you are in the Other Phone mode, wait for the other phone to ring and answer the call.

The system makes a call to the dialed number and creates a work item in the Work List window when the called party accepts call.

5. On the action bar, click **New Work > New Call**.

6. In the **Text Entry** field, type the contact name or a valid deskphone number.
7. Click **Initiate Call** or press `Enter`.

If you enable the **Display confirmation window before dialing a number** option in the Dialing Rules panel, the system displays the Call confirmation window.

The deskphone forces off hook on the speaker phone, or if you have a headset you are already off hook. To use the handset, lift the handset. Your deskphone rings before the destination deskphone answers and dials a call to the number specified in the field.

The system makes a call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Making a call from the Contact List window

Contacts List is the address book with details of each contact that you create and save in the computer.

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **Contact List**.

The system displays the Contact List window with a list of specific names with contacts available communication channels.

2. In the Contact List window, select **Click To call** for the contact.

If the recipient has more than one deskphone number, the system presents with the list of deskphone number in the following order: work phone, mobile number, and home phone.

The deskphone forces off hook on the speaker phone, or if you have a headset you are already off hook. To use the handset, lift the handset. Your deskphone rings before the destination deskphone answers and dials a call to the number specified in the field.

The system makes a call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Making a call from the Work Log window

The Work Log window maintains records of recent incoming, outgoing, and missed calls. You can use these call logs to return or make a call.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Work Log**.

The system displays the Work Log window with the list of recent calls with the date, time, duration, and available communication channels.

2. Scroll down to the contact to call and click the **Click To call** icon. You can also double-click the contact log.

If you activated the Enable the Display confirmation window before dialing a number in the Dialing Rules panel, the system displays the Call confirmation window.

Note:

The deskphone does not display the Transfer, Conference, and Hold buttons unless the called party answers the call. Apply the same edit in all instances and topics.

3. If you are making a call through a deskphone, perform previous tasks.
 - If you are in the Desk Phone mode, the deskphone forces off-hook on the speaker phone, or if you have a headset you are already off-hook. To use the handset, lift the handset. Your deskphone rings before the destination deskphone answers and dials a call to the number specified in the field.
 - If you are in the Other Phone mode, wait for the other phone to ring and answer the call.

The phone forces off-hook on the speaker phone, or if you have a headset you are already off-hook. To use the handset, lift the handset. Your deskphone rings before the destination deskphone answers and dials a call to the number specified in the field.

The system makes a call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

4. If you are making a call through a deskphone, the deskphone forces off-hook on the speaker phone, or if you have a headset you are already off-hook. To use the handset, lift the handset. Your deskphone rings before the destination deskphone answers and dials a call to the number specified in the field.

The system makes a call to the dialed number and creates a work item in the Work List window when the recipient answers the call.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Making a call using the Speed Dial list

With the Speed Dial feature, you can gain access to frequently used telephone numbers or contacts. The system saves these numbers as shortcuts in the Speed Dial list.

Before you begin

Save contacts in the **Speed Dial** list. Otherwise, the system does not display the **Speed Dial** menu item.

About this task

Use the Speed Dial feature to begin a call, to transfer a call, or to plan an active call in the conference.

Procedure

1. On an active call, perform any one of the following actions:

- To call a contact in the SpeedDial list, click **Add call to WorkItem > SpeedDial** and choose a deskphone number.

The system displays the confirmation window depending on the selection. The system begins a call to the contact in the SpeedDial list and creates an active work item in the Work List window.

- To conference a contact in the SpeedDial list, click **Conference > SpeedDial** and select the deskphone number.

The system initiates a call to the contact in the SpeedDial list and creates an active work item in the Work List window. When the contact accepts the call, add the contact to the conference based on the conference settings.

- To transfer a call to a contact in the SpeedDial list, click **Call Transfer > SpeedDial** and choose the deskphone number.

The system initiates the call to the contact and creates an active work item in the Work List window. When the contact accepts the call, transfer the call based on call transfer settings.

Note:

The system does not display the Transfer, Conference, and Hold buttons unless the called party answers the call.

2. Take the appropriate action as necessary and complete the work item.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Consulting a contact in the list

Before you begin

You must have an active call in the Work List window.

About this task

Use the following procedure to:

- Begin a call with the contacts in the list.
- Consult with an agent or supervisor.
- Transfer a call to an agent or supervisor.
- Put an active call on a conference with another agent or supervisor.

Procedure

1. On an active call in Avaya one-X Agent, perform the following actions:

- To consult a contact over a deskphone:

- a. In the Work List window, click **Add call to WorkItem > Contacts**.

The system displays the Contact List window with contacts that are available through the deskphone.

- b. Click the **Click to Dial** button.

The system initiates a session with the selected contact and creates another work item in the Work List window.

 Note:

The system does not display the Transfer, Conference, and Hold buttons unless the remote party answers the call.

- To add a contact to a conference call, perform the following actions:

- a. In the Work List window, click **Conference > Contacts**.

The system displays the Contact List window with contacts that are available through the deskphone.

- b. Click the **Click to Dial** button.

The system initiates the call with the selected contact and creates an active work item in the Work List window. When the selected contact accepts the call, add the contact to the call based on the conference settings.

- To consult a contact over IM, perform the following actions:

- a. In the Work List window, click **Add IM to WorkItem > Contacts**.

The system displays the Contact List window with contacts that are available through IM.

- b. Click the **Click to IM** button.

The system initiates an IM session with the selected contact and creates an active work item in the Work List window and IM window.

2. Take appropriate actions as necessary, and complete the work item.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Making a call from the Dialpad window

You can use the Dialpad window in the same way that you use the key pad on a deskphone. For example, you can use the dialpad to answer a call and to retrieve the voice mail from the voice mail

box through the Dual-Tone Multi-Frequency (DTMF) signaling. You must do this on a consistent basis.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Dialpad**.
2. Expand the Dialpad window to see the full line appearance display.
3. Perform any one of the following actions:
 - If you are using the My Computer configuration:
 - a. Select a free line appearance by clicking one of the lamps on the right.

The selected line appearance changes to green and you receive a service link call. The system transfers the call to the speaker phone if you have not activated the headset.
 - b. Click the on-screen number pad exactly as you do to type the numbers on a deskphone.

When you finish dialing, you hear an alert to indicate that the system has started the call. The system displays the deskphone set button.
 - c. When you finish talking, click **Release** to end the call.

Note:

At any stage during the call, you can move to the main window and use the standard media and work item controls as normal.

- If you are using the Desk Phone configuration, perform the following actions:
 - a. Select a free line appearance by clicking one of the lamps on the right.

The selected line appearance changes to green and you receive a service link call. You get the speaker phone if you have not activated the deskphone.
 - b. Wait for the dial tone, and click the on-screen number pad exactly as you do to type the numbers on a deskphone.

When you finish dialing, you hear an alert to indicate that the system has started the call.
 - c. When you finish talking, click **Release** to end the call.
- If you are using the Other Phone configuration, perform the following actions:
 - a. Select a free line appearance by clicking one of the lamps on the right.

The selected line appearance changes to green and you get a service link call.
 - b. Wait for the dial tone, and click the on-screen number pad exactly as you do to type the numbers on a deskphone.

When you finish dialing, you hear an alert to indicate that the system has started the call.
 - c. When you finish talking, click **Release** to end the call.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Calling Supervisors from Contact List

You can contact your supervisors directly if the system administrator has administered Avaya one-X® Agent with Central Management and added supervisors to the My Supervisors group. By default, the system adds supervisors to the speed dial list to each member through Central Management.

Before you begin

- The system administrator must configure Avaya one-X® Agent with Central Management.

Procedure

1. On an active in Avaya one-X® Agent, click **Contact List**.

The system displays the Contact List window with **My team** and **My Supervisors** lists.

2. Click the corresponding arrow icon next to **My Supervisors** to expand the list.

The system displays the list of supervisors in the **My Supervisors** list.

3. Click the appropriate channel to contact the supervisor.

If the system administrator configured you with Supervisor Assist, and the supervisor on the skill set is configured in Communication Manager managed assist extension for the skill you are handling, you can contact the supervisor directly from the **My Supervisors** list during an ACD call.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Put a call on hold

With the Call Hold feature, you can put an active call on hold. The call remains active although you and the other party cannot hear each other. You can answer other calls while the active call is on hold. Depending on the system settings, you can put an active call on hold either manually or automatically.

By default, Avaya one-X® Agent puts an active call on hold automatically when you begin a new call or reactivate a previously held call. The option to configure the call hold feature is available in the Call Handling panel in the Agent Preferences dialog box.

! Important:

Use the auto hold feature as the feature works best in real-time scenarios.

 Note:

The system generates music or a beeping tone while the conference call is on hold, based on the non-ACD music on-hold feature administration. Therefore, you must avoid putting a conference call on hold.

Putting a call on hold manually

About this task

Use the manual hold option to put an active call on hold manually when you begin a new call or reactivate the previously held call.

Procedure

1. On an active call, perform any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, click **Hold**.
- If you are using the Desk Phone configuration, on the deskphone set, press **Hold**.

The fast blinking LED next to the call line appearance button on the deskphone indicates that the active call is on hold.

If you try to perform any other tasks without putting the active call on hold, the system displays the warning message. If you still try to perform any other task, the held call drops.

The system puts the active call on hold.

2. To return to the previously held call, perform any one of the following actions:

- If you are using the My Computer configuration, in the Work List window, click **Unhold**.
- If you are using the Desk Phone configuration, on the deskphone set, press **Unhold** when a single call is on hold or press the corresponding call line appearance button when multiple calls are on hold.

You can change between calls by clicking the **Unhold** button for the corresponding called parties.

Related links

[Call Handling panel field descriptions](#) on page 157

Putting a call on hold automatically

Before you begin

Enable the Auto-Hold option in the Call Handling panel in the Agent Preferences dialog box.

About this task

Use the auto hold option to put an active call on hold automatically when you begin another call.

Procedure

1. On an active call, perform any one of the following actions:

- If you are using the My Computer setting, in the Work List window, click any feature button. For example, click the **Consult** button.
- If you are using the Desk Phone setting, on the deskphone, press any feature button. For example, press the **Transfer** button.

The fast blinking LED next to the call line appearance button on the deskphone indicates that the active call is on hold.

The system puts the active call on hold automatically.

2. To return to the previously held call, perform any one of the following actions:

- If you are using the My Computer setting, in the Work List window, click **Unhold**.
- If you are using the Desk Phone setting, on the deskphone, press **Unhold** when a single call is on hold or the line appearance when multiple calls are on hold.

You can change between calls by clicking the **Hold** button for the corresponding called parties.

 Note:

You must perform all these operations from the Avaya one-X[®] Agent client.

Related links

[Call Handling panel field descriptions](#) on page 157

Conference call

With conference calls, you can communicate with several people simultaneously. During the conference call, you can:

- Exit the conference call to answer other calls and then return to the conference.
- Exit permanently while the other participants continue speaking.
- Add up to five participants to a conference call.

 Note:

Before you begin a conference call, you must have at least one active call in the Work List window.

 Note:

If a call is a TTY call, then you cannot make a conference call. The conference fails and the system displays an error message.

Avaya one-X® Agent offers two types of conference calls:

- Direct Conference: You add the participants to the conference call without speaking to them.
- Consultative Conference: You speak to participants before adding them in to the conference call.

Depending on the system settings, you can use Consultative Conference or Direct Conference. The option to configure conference call is available in **System Options > Agent Preferences > Call Handling**.

In Windows 7 and later, if your computer goes in the Sleep or Hibernation mode during a conference call with Agent 1 and Agent 2, the system maintains the voice path with Agent 1 and Agent 2. Agent 1 and Agent 2 can continue the conversation. However, agents cannot hear your voice.

Making a direct conference call

Before you begin

Disable the Consultative Conference option in **System Options > Agent Preferences > Call Handling**.

About this task

Use the direct conference feature to add participants to the conference without announcing the conference.

Procedure

1. On an active call, perform any one of the following actions:
 - To establish a conference call the call with your supervisor, in the Work List window, click **Add WorkItem to Conference > Supervisor**. For more information, see [Calling Supervisors from Contact List](#) on page 71.
 - To conference the call using the SpeedDial list, in the Work List window, click **Add WorkItem to Conference > SpeedDial**. For more information, see [Making a call using the Speed Dial list](#) on page 67.
 - To conference the call with an agent in the contact list, in the Work List window, click **Add WorkItem to Conference > Contact List**. For more information, see [Making a call from the Contact List window](#) on page 66.
 - To conference the call with an agent using the text input field, in the Work List window, click **Add WorkItem to Conference > Enter Value**. For more information, see [Making a call from the Text Input field](#) on page 65.

The system creates a new call in the conference with the first call in the work item where the first call appears.

2. To add more participants to the conference, click **Add to Conference** and repeat Step 1.
3. To control the conference hold options, perform any one of the following options:
 - To put the conference on hold, click **Hold Conference**.

- To return to the conference on hold, click **Unhold Conference**.
4. To end the conference call, perform any one of the following steps:
- To drop the last added participant from the conference call, click **Drop** for the participant.
The conference returns to a normal call.
 - To close the conference call, click **Drop** in the corresponding work item.

Depending on the Communication Manager settings and on whether the conference participants are local extensions or trunk calls, dropping a conference can release some or all participants from the conference.

The system drops you out of the Communication Manager conference. But, the other two parties, if connected on the same Communication Manager, that is, one participant on Communication Manager and the other participant on a trunk call, or both on a trunk call can continue the call.

Related links

[Call Handling panel field descriptions](#) on page 157

Making a consultative conference call

Before you begin

Enable the Consultative Conference option in **System Options > Agent Preferences > Call Handling**.

About this task

Use consultative conference to announce the call to the third-party before you conference the call.

Procedure

1. On an active call, perform any one of the following actions:
 - To conference the call with the supervisor, in the Work List window, click **Add WorkItem to Conference > Supervisor**. For more information, see [Calling Supervisors from Contact List](#) on page 71.
 -
 - To conference the call using the SpeedDial list, in the Work List window, click **Add WorkItem to Conference > SpeedDial**. For more information, see [Making a call using the Speed Dial list](#) on page 67.
 - To conference the call with an agent in the contact list, in the Work List window, click **Add WorkItem to Conference > Contact List**. For more information, see [Making a call from the Contact List window](#) on page 66.
 - To conference the call with an agent using the text input field, in the Work List window, click **Add WorkItem to Conference > EnterValue**. For more information, see [Making a call from the Text Input field](#) on page 65.

The system places the first party call on hold and dials a call to the selected third party.

2. Wait for the third-party to answer and announce the conference call.

The new call to third party is a consult call and displays the **Hold call**, **Consultive/Complete Conference**, and **End Call** buttons. The consultative call has **Consultive/Complete Conference** button in place of the **Transfer** button.

Avaya one-X® Agent supports switching between the consult call and the existing call. However when you switch between the consult call and the existing call you are no longer in the consult call. The system replaces the **Consultive/Complete Conference** button with the **Transfer** button and adds the **Add WorkItem to the Conference** option.

 Note:

You cannot drag and drop if the call is in the consultative state.

3. Click the **Consultive/Complete Conference** button to complete the conference and add both parties into the conference.
4. To add more participants or new consult to the conference, click **Add to Conference** and repeat previous steps.
5. To control the call hold options, perform any one of the following steps:
 - To put the conference on hold, click **Hold Conference**.
 - To return to the conference on hold, click **Unhold Conference**.
6. To end the conference call, perform any one of the following steps:
 - To drop the last added participant from the conference call, click **Drop** for the participant.
The conference returns to normal call.
 - To close the conference call, click **Drop** in the corresponding work item.

Depending on the Avaya Aura® Communication Manager settings, and on whether the conference participants are local extensions or trunk calls, dropping a conference can release some or all participants from the conference.

The system drops you out of the Avaya Aura® Communication Manager conference. But the other two parties if connected on the same Communication Manager—one person on Avaya Aura® Communication Manager and the other on a trunk call, or both on a trunk—are allowed to continue the call.

Related links

[Call Handling panel field descriptions](#) on page 157

Call transfer

With the call transfer feature, you can transfer an ACD or a direct call to another caller in the contact center using the agent extension. Avaya one-X® Agent offers two types of call transfer:

- **Direct Transfer:** You transfer an active call to a contact in the contact center without announcing the transfer.
- **Consultative Transfer:** You speak to the contact before transferring the call.

Depending on the system settings, you can use Direct Transfer or Consultative Transfer. You can configure the call transfer settings that are available from **System Options > Agent Preferences > Call Handling**.

Making a direct transfer

Before you begin

Disable the Consultative Transfer option in **System Options > Agent Preferences > Call Handling**.

About this task

Use the direct transfer feature to forward a call to the third party without announcing the call transfer.

Procedure

On an active call, perform any one of the following actions:

- To transfer the call to your supervisor, in the Work List window, click **Transfer Call > Supervisor**. For more information, see [Calling Supervisors from Contact List](#) on page 71.
- To transfer the call using the SpeedDial list, in the Work List window, click **Transfer Call > SpeedDial**. For more information, see [Making a call using the Speed Dial list](#) on page 67.
- To transfer the call to an agent in the contact list, in the Work List window, click **Transfer Call > Contact List**. For more information, see [Making a call from the Contact List window](#) on page 66.
- To transfer the call to an agent using the text input field, in the Work List window, click **Transfer Call > EnterValue**. For more information, see [Making a call from the Text Input field](#) on page 65.

The system transfers the active call to the selected contact directly and ends the call on your interface. If you set the work completion option to the Allow Follow-Up mode, the work item/call moves to the follow-up mode after the call transfer. For more information, see [Completing the work](#) on page 98.

Related links

[Call Handling panel field descriptions](#) on page 157

Making a consultative transfer

Before you begin

Enable the Consultative Transfer option in **System Options > Agent Preferences > Call Handling**.

About this task

Use the Consultative Transfer feature to announce the call before transferring the call to a third party.

Note:

You cannot change between two live calls during a consultative call. However, you can create a new work item in the Work List window using the **Add Call** button and change between two active calls. To transfer the call to the caller in another work item, drag and drop the call into the held call work item.

Procedure

1. On an active call, perform one of the following actions:
 - To transfer the call to a contact in the Speed Dial list, in the Work List window, click **Transfer Call > SpeedDial**. For more information, see [Making a call using the Speed Dial list](#) on page 67.
 - To transfer the call to an agent in the contact list, in the Work List window, click **Transfer Call > Contact List**. For more information, see [Making a call from the Contact List window](#) on page 66.
 - To transfer the call to an agent using the text input field, in the Work List window, click **Transfer Call > Enter Value**. For more information, see [Making a call from the Text Input field](#) on page 65.

The system puts the first party call on hold, dials the number, and creates a new call in the work item. Wait for the third party to answer the call, and announce the call transfer. The system displays the **End call**, **Consultive Transfer**, and **Hold** buttons.

Avaya one-X® Agent supports switching between the consult call and the existing call. However when you switch between the consult call and the original call you are no longer in the consult call. The system replaces the **Consultive/Complete Conference** button with the **Transfer** button and adds the **Add WorkItem to the Conference** option.

2. Click the **Consultive/Complete Transfer** button to complete the transfer when consultation is complete.

Related links

[Call Handling panel field descriptions](#) on page 157

Alternating between live calls

You can alternate between two live calls to carry out a private conversation with each called party. You can use this function during consultative transfer and consultative conference.

About this task

Use the following procedure to alternate between two live calls in the Work List window.

Procedure

On the two live calls, perform the following actions:

- To speak to the second party, in the first party Work List window, click **Hold**.
- To speak to the first party, in the second party Work List window, click **Hold**.

You can continue to alternate between the first party and the second call by clicking the corresponding hold button. When you speak to one party, the system puts the other party call on hold.

Muting and unmuting your workstation

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

About this task

Use the mute function to prevent other parties from listening to your conversation or to avoid the background noise during an active call.

Procedure

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

- To mute the call, click **Mute**.

The Mute button changes to Unmute, and other listeners cannot hear any background noise.

- To unmute the call, click **Unmute**.

The Unmute button changes to Mute, and the callers can hear you speak.

Ending a call

You can end a call in several ways. You can end a call in several ways using the Release feature that the administrator has configured for the station.

About this task

Use the following procedure to end an active call or to drop the last called party from a conference call.

Procedure

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

- If you are using the My Computer setting, click **End Call** for the call in the **Work List** window.
- If you are using the Desk Phone setting and not logged in as an agent with Communication Manager Auto Answer, end the call by disconnecting the phone.
- If you are using the Other Phone setting and not logged in as an agent with Communication Manager Auto Answer, click **End Call**.

If you have put a call on hold, you must first reconnect to the call and then drop the call.

Next steps

When you drop a call, you must wrap up the work item for the corresponding call. If you set the work completion option to Allow Follow-Up or Auto-Follow-Up, the call changes the work item to the follow-up state. For more details, see [Completing the follow-up work](#) on page 98.

Chapter 6: Instant Messaging and Presence Services

This chapter describes Instant Messaging (IM) and Presence Services features and how to use these features in Avaya one-X® Agent.

Avaya one-X® Agent supports IM and Presence Services features. If you or your administrator configured the IM setting, you can:

- Add an IM contact to the list
- View the contact Presence status
- Start IM sessions with contacts in the contact list

You cannot add an IM contact on the desktop if the administrator has not configured the IM settings in Central Management.

With IM, you can communicate with agents in real time using the Avaya one-X® Agent client. Using the Presence Services feature, you can view the presence status of agents, voice channel state, and IM state.

Avaya one-X® Agent works with Avaya one-X® Communicator and Microsoft Office Communicator.

IM and Presence features

The IM and Presence features provide the following options:

- Configure IM credentials before and after logging on to the application.
- Subscribe to the agent state, Voice channel state, and IM channel state of other agents.
- Click the contact list and view IM agents in the contact list.
- Add the IM work item to an active call from another agent present in the contact list.
- Type the IM user ID in the Text input field to begin an IM session.
- Add a Microsoft Office Communicator contact using MOC handle and communicate with the contact.
- Add an Avaya one-X® Communicator contact using an XMPP handle and communicate with the contact.

Note:

Avaya one-X® Agent supports Presence Services.

Other options

- All IM interactions with multiple recipients appear in the same window where you can expand or contract each IM session, as needed. While replying to multiple IM responses, you must first select recipients from the IM window.
- The IM feature also supports standard features, such as emoticons, https links, and indicates if the other agent is composing a message.

Note:

The IM and Presence features are optional. You can only use these features if you logged in to Presence Services.

In Windows 7 and later, during an IM interaction if the computer goes in the Sleep or Hibernation mode, Avaya one-X[®] Agent cannot receive the IM messages. The system logs you out from the IM session. When you wake the computer from the Sleep or Hibernation mode, you must log in to Avaya one-X[®] Agent and IM again.

Related links

[IM window](#) on page 82

[Viewing the presence status](#) on page 84

[Sending IM from the Text input field](#) on page 85

[Sending IM to contacts from Contact List](#) on page 86

[Sending IM from the Work Log window](#) on page 87

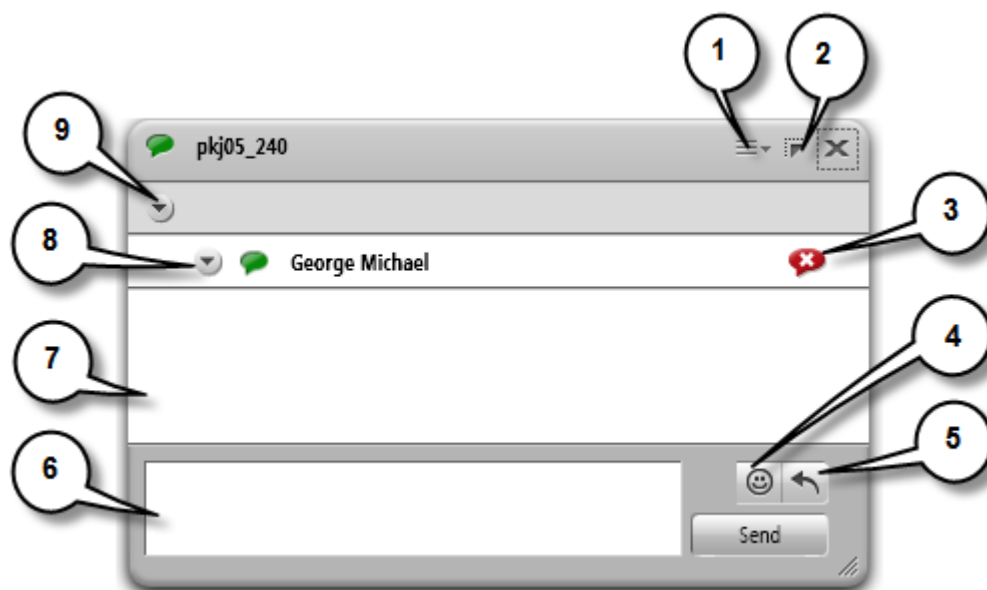
[Consulting by Instant Messaging](#) on page 87

[Ending an IM interaction](#) on page 88

IM window

Use the IM window for IM interactions. The system displays the IM window when you begin an IM interaction from the main application window.

The following figure explains the controls of the IM window:



No.	UI object	Description
1	Options	<p>The Option menu has the following items:</p> <ul style="list-style-type: none"> • IM Settings: Displays the Agent Preferences dialog box with the Instant Messaging panel. To configure the message appearance, see Configuring the incoming Instant Message appearance on page 46. • Help: Displays the help for the IM window.
2	Dock	<p>Click Dock to attach the IM window to the program window. You can dock the window to:</p> <ul style="list-style-type: none"> • Left • Top • Right • Bottom
3	End IM	Click End IM to end the corresponding IM interaction.
4	Emoticons	<p>The Emotions option presents the list of emoticons. You can select one or more emoticons to use in your IM interaction. You can use the following expressions:</p> <ul style="list-style-type: none"> • Smile • Wink • Laugh • Frown • Angry • Stick out tongue • Confused

Table continues...

No.	UI object	Description
		<ul style="list-style-type: none"> • Sick • Ambivalent
5	Add Response	Click Add Response to view the list of automated responses that you can add to your IM interaction. To add automated responses, see Configuring the incoming Instant Message appearance on page 46.
6	Message entry box	Use Message entry box to enter the IM interaction text.
7	IM Interaction box	IM Interaction box displays the incoming and out going messages.
8	Close Additional Information	Use the Close Additional Information button to hide the corresponding IM interaction text under the IM contact ID. When you receive IM messages, the IM icon next to the contact ID flickers to alert you about the message.
9	Close Additional Information	Use the Close Additional Information button to hide all IM interactions in the current work item.

Related links

[Instant Messaging and Presence Services](#) on page 81

Viewing the presence status

IM Presence indicates the Available, Busy, or Away state of a contact by using the information from the contact list. You can view the presence status of an agent for voice and IM next to the contact name in the list.

The system changes the presence status to:

- Busy when an agent is busy in a call or in an IM interaction.
- Away when an agent is idle on a computer.
- Available automatically when on movement of the mouse or keyboard.

The following table lists the different states if voice and IM channel:

Channel	Available	Busy	Unavailable	Be Right Back	Away	Do Not Disturb
Voice				-	-	-
IM						

The Avaya one-X[®] Agent presence states map to Avaya one-X[®] Communicator and Microsoft Office Communicator presence as follows:

Avaya one-X® Agent	Avaya one-X® Communicator	Microsoft Office Communicator Server
Available	Available	Available
Busy	Busy	Busy
Unavailable	Unavailable Out Of Office Appear Offline	Unavailable
Away	Away	Away
Do Not Disturb	Busy	Busy
Be Right Back	Unavailable	Away

*** Note:**

The Agent state in Avaya one-X® Agent is invisible to Avaya one-X® Communicator or Microsoft Office Communicator as these IM tools do not have the agent state.

Before you begin

- Presence Services must be present as server components in the deployments.
- The agent must be a member of the contact list and must have an IM address.
- You must log on to Presence Services

About this task

Use the following procedure to view the Presence status of a contact in the Contacts List window:

Procedure

1. On the action bar, click **Contact List**.
The system displays the Contacts window.
2. To know the agent status of a contact, view the extreme left column.
For information about the agent status, see [Agent status and system messages](#) on page 16.
3. To know the voice and IM channel status of a contact, view the extreme right column.

Related links

[Instant Messaging and Presence Services](#) on page 81

Sending IM from the Text input field

Before you begin

You must have:

- Avaya one-X® Communicator and Microsoft Office Communicator IM contacts in the contact list with a valid IM address and must be logged on to Presence Services.

- The user credentials to begin an IM session with other users not in the contact list.
- The user ID and the domain name of the recipient.

Procedure

1. On the Action bar of Avaya one-X® Agent, click **New Work > New IM** menu.

The system displays the **Work Options** icon.

2. Type the recipient IM user ID and domain name in the following format:

<IM user ID>@<Domain name>

3. Press **Enter**, or click the **IM** icon next to the **Text input** field.

If the IM window does not open on the desktop, the system displays a message in a new IM window. The system creates an IM work item and displays in the Work List window.

For subsequent communication, you can directly type your text in the IM window.

Related links

[Instant Messaging and Presence Services](#) on page 81

Sending IM to contacts from Contact List

Before you begin

The contact must be present in the contact list with a valid IM address and logged on to Presence Services. The Avaya one-X® Communicator and Microsoft Office Communicator contacts must be present in the IM contact list with valid IM addresses and logged on to Presence Services.

About this task

Use the following procedure to send instant messages to Avaya one-X® Communicator and Microsoft Office Communicator contacts.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.

The system displays the Contacts window in the Action bar.

2. In the Contact List window, click the **Click to IM** icon against an IM contact.

The system displays a new chat window to begin an IM session.

3. In the IM window, type your message and click **Send**.

The system creates a new IM work item and displays the work item in the Work List window.

If you begin more than one IM interaction, the system adds the new IM recipients to the same IM window. You must select the correct recipient in the IM window to send the IM message.

Related links

[Instant Messaging and Presence Services](#) on page 81

Sending IM from the Work Log window

Before you begin

- Ensure that the IM contact is present in the contact list and is available on Presence Services

Procedure

1. On the action bar of Avaya one-X® Agent, click the **Work Log** icon.

The system displays the Work Log window in the Action bar.

2. To select the appropriate work log, click the **Show** and **View** lists.

3. Click the **Click to IM** icon against the recipient name.

The system displays a new IM window.

4. Type the message in the **IM** text box on the IM window, and click **Send**.

The system creates a new IM work item and displays the work item in the Work List window. If you begin more than one IM interaction, the system adds the new IM recipients to the same IM window.

 Note:

Select the correct recipient in the IM window before sending an IM message.

Related links

[Instant Messaging and Presence Services](#) on page 81

Consulting by Instant Messaging

About this task

You can begin an IM consultation with an incoming voice caller. If the caller meets all prerequisites for an IM interaction, the system enables the **Add IM to work item** icon for the incoming call.

Procedure

1. From the Work Item control window, click the **Add IM to work item** icon.

The system begins an IM interaction with the caller in a new IM window.

2. Type the message in the IM window text box, and click **Send**.

Related links

[Instant Messaging and Presence Services](#) on page 81

Ending an IM interaction

Procedure

Click the **End IM** icon to end your IM interaction.

If you click the **End IM** icon in the IM window, the system ends the relevant IM interaction. However, if you click the **End IM** icon in the workspace, the system closes all IM interactions in the IM window.

Related links

[Instant Messaging and Presence Services](#) on page 81

Chapter 7: TTY call handling

Callers with hearing or speech impairments can use special text devices to call a contact center. These devices are known as Tele Typewriters (TTY). Earlier, a user required a unique device at the receiving end to interpret the text and responses. Avaya one-X® Agent, with the Communication Manager PSTN Gateways, provides integrated TTY conversation support for an agent. These TTY interactions appear as normal My Computer calls to the agent, except that Avaya one-X® Agent detects the text tones and displays the text tones for agents. Similarly, an agent can type characters. The system converts these tones to descriptor tone packets so that the Communication Manager gateway can convert the packets to the PSTN tones, if required.

The system displays the TTY interaction in a window similar to the IM window. Agents interact with TTY callers using normal roman alphabets and standardized abbreviations available on the TTY interaction window. Messages are exchanged in normal characters during a TTY session. TTY protocols rely on a significant number of abbreviations. For example, Go Ahead (GA) is the signal that the person typing has paused and is waiting for a response.

In Windows 7 and later, during a TTY session if your computer goes in to the Sleep or Hibernation mode, then the system does not deliver the TTY message to Avaya one-X® Agent.

Related links

[TTY window](#) on page 89

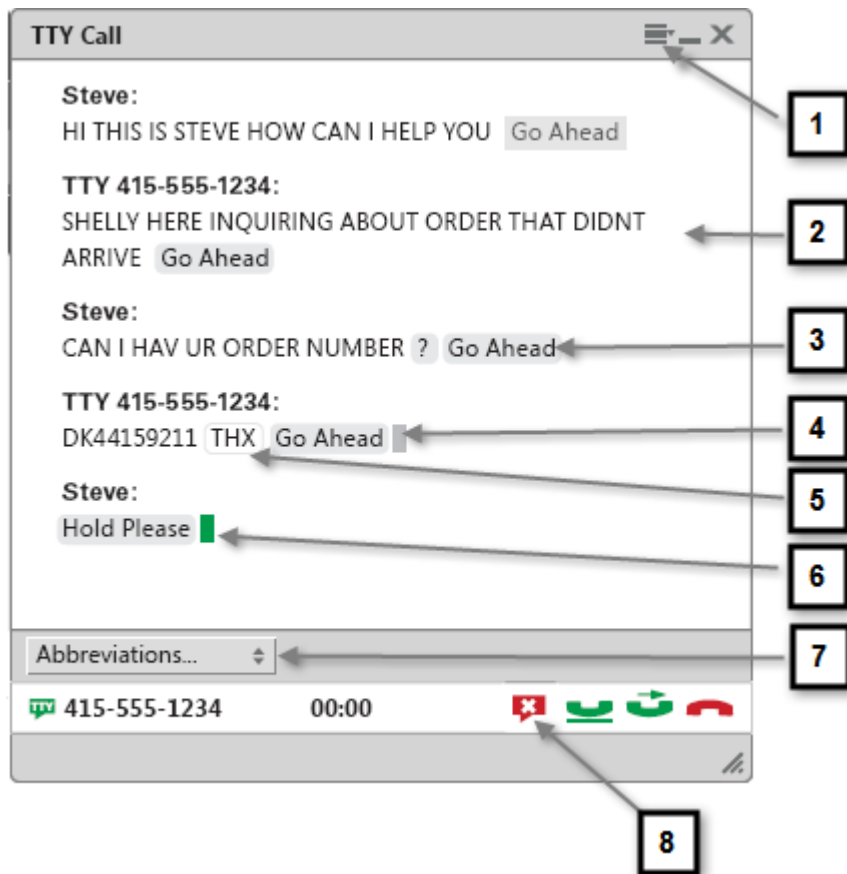
[Answering a TTY call](#) on page 91

[Using abbreviations in TTY calls](#) on page 91

[Ending a TTY call](#) on page 92

TTY window

The system displays the TTY window only after you accept a TTY call. The following figure shows the controls of the TTY window while the reference table explains the controls:



No.	UI object	Description
1	Dock	Docks the TTY window to the main program window. The docking options available are: <ul style="list-style-type: none"> • Left • Top • Right • Bottom You can use the same button to Dock and Undock .
2	Message area	Displays the TTY interaction.
3	Go Ahead for GA	Marks the end of the preceding message string so that the other person on the call can type a response.
4	Caller cursor	Displays a dimmed cursor against the text.
5	Recognized abbreviation	Processes the abbreviations that a TTY user can use to ease the user communication.
6	Agent cursor	Displays a green cursor for agent messages.
7	Abbreviations Menu	Displays a TTY abbreviation list.
8	End TTY	Ends the TTY interaction.

Related links

[TTY call handling](#) on page 89

[Using abbreviations in TTY calls](#) on page 91

[Answering a TTY call](#) on page 91

Answering a TTY call

About this task

The system displays the TTY call as a regular call with the voice call icon on the work list window. However, Avaya one-X® Agent processes the call as TTY call from the call signal and displays an **Initiate TTY** button in the work list window. The system also displays a blank TTY window with the incoming call. You can set other options for the TTY window display. For more information about the TTY field descriptions, see [TTY panel field descriptions](#) on page 155.

Procedure

1. Click the **Initiate TTY** button on the work list window.

The system accepts the TTY call and displays the TTY window as the active window.

2. Type the messages at the green prompt on the TTY window, and end the message string with the GA abbreviation.

The abbreviation indicates that the recipient of the message can type a message.

 Tip:

TTY message recipients must not interrupt the TTY message sender from sending the messages.

 Note:

You can put a TTY call on hold as you do for a telephony call. However, to end the call, you must click the **End TTY** button.

Related links

[TTY call handling](#) on page 89

[Using abbreviations in TTY calls](#) on page 91

[TTY window](#) on page 89

Using abbreviations in TTY calls

About this task

Avaya one-X® Agent provides a standard options to add others, delete, or edit present entries. TTY callers use TTY abbreviations for ease of communication and efficiency in sending messages. You

can insert abbreviations either from the Abbreviations menu on the TTY window or insert the abbreviation from the list of abbreviations using the cursor.

Procedure

1. To insert abbreviations in your message from the **Abbreviations** menu, perform the following actions:

- a. Put your cursor at a specific location to insert the abbreviation.
- b. Click the **Abbreviations** menu.

The system displays the abbreviations list that contains TTY abbreviations with expanded forms.

- c. Select the abbreviation from the list.

The system displays the abbreviation at the cursor location.

2. To start the abbreviation list at the cursor location, perform the following actions:

- a. Double-click the ~ (tilde) key on the keyboard.

The system displays the abbreviations list next to your cursor.

- b. Type the letters of your abbreviation in the abbreviation list.

The system displays the abbreviation matching the typed letters.

- c. Select the abbreviation in the list.

The system displays the abbreviated letter matching the selected abbreviation at the cursor location.

Enter the GA abbreviation to end the message string. Avaya supplies this abbreviation as a standard set with Avaya one-X[®] Agent. Avaya programs use <CR>. You must not delete <replace the text>.

Related links

[TTY call handling](#) on page 89

[Answering a TTY call](#) on page 91

[TTY window](#) on page 89

Ending a TTY call

Before you begin

You must be in a TTY call.

Procedure

To end a TTY call, press the **Disconnect** red button.

 Note:

If you click the **End TTY** button on the work list window or the TTY window, the system closes the TTY window. But, the TTY call remains active. You can open the TTY window to continue the TTY call.

Related links

[TTY call handling](#) on page 89

Chapter 8: About common tasks

This chapter explains the common tasks that you can perform using Avaya one-X® Agent.

Changing the answer settings

You can answer an incoming call manually or automatically. When you select the answer setting to Manual-Accept, you must click Answer or go off-hook on the deskphone to answer an incoming call.

When you select the answer setting to Auto-Accept, the system automatically accepts a call when your extension receives the call.

Avaya one-X® Agent supports the following three ways of automatically answering calls:

- Auto Answer that Avaya one-X® Agent supports where agents can set the answer settings to answer automatically.
- Auto Answer that Avaya Aura® Communication Manager administers where the administrator has configured the extension in Communication Manager to answer the call automatically
- Auto Answer that Permanent service administers where agents can answer calls automatically with the permanent service link.

Procedure

Perform any one of the following actions:

- 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**.

You can change the default answer setting from the **Work Handling** panel.

Related links

[Work item controls and functionalities](#) on page 21

Changing the agent work status

The different types of agent state are Ready, After-Call Work, and Auxiliary:

- **Ready:** Agents use the Ready state to indicate that the agents are available for ACD calls.
- **After Call Work:** Agents use the After Call Work state to indicate that tasks related to the previous call are being performed. Agents can select this work mode during an active call. The system does not display the change until the agent completes the current call.

 Note:

The system does not display the After Call Work mode if the administrator has disabled this option. However, if Communication Manager puts the agent in the After Call Work mode, the system displays the After Call Work mode in the top bar with a red icon.

- **Auxiliary:** Agents use the Auxiliary mode to indicate that agents cannot receive ACD calls. This mode indicates that the agent is not near the deskphone due to lunch breaks, approved periods of inactivity, meetings, or trainings.

 Important:

Agents must always watch the status on the top bar to monitor the work status. ACD routes calls to the extension only if agents set the status to Ready and close all work items to get a new ACD call. If agents set the status to Auxiliary or Logged Out, ACD does not send calls to that extension until the agent changes the status to Ready.

About this task

You can control the status and the availability for accepting ACD calls. For example, if you need time after a recently concluded call, you can make yourself temporarily unavailable for ACD calls.

Procedure

Perform any one of the following actions:

- To accept ACD calls, on the top bar, click **Agent Status > Ready**.

The system changes the agent work status to Ready on the status bar indicating that you are ready to accept ACD calls. The system starts the State Timer for Ready State at the bottom of the Work Item panel.

- If you are servicing the previous call, on the top bar, click **Agent Status > After Call Work**.

The system changes the agent work status to After Call Work on the status bar indicating that you are not ready for ACD calls. If you change the agent state while on a call, the system changes the state only after you release the call. The system starts the State Timer for After Call State at the bottom of the Work Item panel.

- To decline ACD calls, on the top bar, click **Agent Status > Auxiliary** and select the appropriate reason code from the list, if available.

The system changes the work status to Auxiliary and displays the reason code on the status bar, indicating that you are not ready for ACD calls. If you change the agent state while on a call, the system changes the state only after you release the call. The system starts the State Timer for Auxiliary at the bottom of the Work Item panel.

- To log out from the ACD service, on the top bar, click **Agent Status > Log Out** and select the reason code from the list, if available.

The system logs you out from the ACD service. Then, the system changes the agent work status to log out with the reason code on the status bar indicating that you have signed out from the ACD service.

You can configure the default agent status to Auto-Ready or Manual-Ready from the **Work Handling** panel.

Related links

[Work Handling panel field descriptions](#) on page 164

Playing recorded greetings manually

Recorded greetings are useful when you frequently play a standard disclaimer statement or when play a recording before answering a call. You can play an agent greeting recording to a caller, who makes an ACD call, before the caller begins speaking with you. An example of an agent greeting is: *Hello, my name is Allen Smith. How can I assist you?*

You can also customize the greeting to play by setting up greeting triggers. To begin the recorded greeting triggers, see [Managing Agent Greetings](#) on page 129.

Before you begin

- Open at least one agent greeting in **System Options > System Settings > Agent Preferences > Record Greetings**.

Procedure

1. When the system receives an incoming call, click **Accept**.
2. On the top bar of Avaya one-X® Agent, click **Play Greetings**, and select an agent greeting for the incoming call.

The system starts playing the agent greeting playback first and then transfers the voice control to you. You can click **Stop Greetings** to bypass or stop the greeting playback.

Note:

- If you play the greeting and the far end holds the call during a call, then the system stops playing the greeting playback. The system does not play the agent greeting again if you put the call on hold.
- If you play the agent greeting during a conference call, then the system does not continue playing the agent greeting, if you drop the participant or the participant drops from the conference call.

Related links

[Recording an agent greeting](#) on page 129

Viewing the Work Item details

You can view details corresponding to a work item in the Work List window. From the work item details, you can view the digits that a caller entered during the IVR interaction, UUI, and work codes for the call.

Procedure

1. On an active call, in the Work List window, click **WorkItem Details**.

The system displays the Work List window with the following data, if configured:

- **Prompted Digits:** A sequence of numbers a caller enters in response to automated questions when the call passes through the IVR system.
- **User to User Info:** A unique identifier that an external application, for example, Avaya ASAI, adds to an incoming call to process the call type.
- **Work Codes:** A code to differentiate the call type for each work item. For example, the system displays a follow-up call to a customer as '13: Follow-up' and a cold call to a customer as '11: Cold Call'.

2. To close the work item details panel, click **WorkItem Details** again.
3. To copy the Work log details, such as Prompted Digits, UUI information, and Work Codes fields, select the text and press the **Ctrl+C** button on the keyboard.

Related links

[Work Handling panel field descriptions](#) on page 164

Assigning a work code

Work code varies from each organization and administrators define the work code. Each work code differentiates the call type for each work item. For example, you can tag a follow-up call as '13: Follow-up' and a cold call to a customer as '11: Cold Call'. You can enter the work code for incoming Automatic Call Distribution (ACD) or Direct Agent Call (DAC).

Procedure

1. On an active call, in the Work List window, click **Add Code**.

The system displays the Work Code window with the corresponding work codes.

2. From the Work Code window, select an appropriate work code.

You can associate multiple work codes to a single work item.

Related links

[Reason Codes panel field descriptions](#) on page 175

Completing the follow-up work

You can complete the follow-up work after finishing a call. To perform the follow-up work on ACD calls, you must set the work status to Allow Follow-up in the Agent Preferences dialog box. When a work item is in the Follow-Up mode in Communication Manager and you are in the After Call Work mode, the system does not send ACD calls to the station unless the administrator has configured the Multiple Call Handling (MCH) feature.

The Follow-Up Work mode timers begins if you selected the timed Follow-Up mode. The predefined countdown timer to complete the task for the work item begins only if you set the timed Follow-Up. When the wrap-up time reaches the limit, the work item closes and the agent status changes. If you finish the task before the countdown timer, click the Work Completion button for the work item in the Work List window.

Depending on the work preference, you can set the work mode to Auto-Complete or Follow-Up. The Follow Up Work mode is available only for ACD calls. You can override the Follow Up Work mode settings on a call by call basis. However, the system applies the changes for the next call. You can configure these settings from the Work Handling panel of the System Settings. For more details about work handling panel, see [Work Handling panel description](#) on page 44.

Before you begin

- Set the Work Completion status as Allow Follow-up in the Agent Preferences dialog box.
- Set the control to **Allow Extending Follow-Up** in the Agent Preferences dialog box if you or your administrator configured **Timed Follow-Up** for the agent to extend beyond this limit. The system removes the timer for this work item. You must complete the work item manually.

Procedure

1. On an active call, in the Work List window, click **Change Work Completion > Allow Follow-up**.

Select **Auto-Complete** only if you do not have any task for the work item and want the system to return to the original state immediately when the contact completes the call.

2. Wait for the contact to disconnect the deskphone.

The system starts the follow-up timer for the work time.

3. Complete the task for the work item.

The system returns to the original state when the follow-up timer expires. If you finish the task before the timer expires, click **Complete WorkItem**.

4. If you require more time to complete the task, then perform the following steps:
 - a. In the Work List window, click **Complete Follow-up > Request More time**.
 - b. After completing the work item, click **Complete Work Item**.

The system returns to the original state.

Related links

[Work Handling panel field descriptions](#) on page 164

Monitoring the audio quality and VoIP traffic

System administrators use the Audio Monitor dialog box to troubleshoot voice quality issues.

About this task

Use the Audio Monitor dialog box to determine the audio quality if the quality of VoIP degrades.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Audio Monitor**.
The system displays the status of audio quality and VoIP traffic information for the corresponding voice call.
2. If you do not want Avaya one-X® Agent to send audio signals when you are not speaking, on an active call, select **Silence suppression enabled**.

Related links

[Audio Monitor dialog box field descriptions](#) on page 181

Accessing your voice mails

Avaya one-X® Agent provides an option for agents to listen to voice messages. When the extension receives a new voice message, the system changes the voice mail indicator to red and displays a mail icon on the upper-left corner.

* Note:

The voice mail service is available only for registered extensions with a voice mail system. If you do not have the voice mail settings on your extension, contact the system administrator. For more information, see [Integrating Voice Mail](#) on page 51.

Before you begin

Ensure that you have a voice mail retrieval number and a mailbox ID.

About this task

Use the following procedure to retrieve your voice mail from the voice mail system.

Procedure

1. When you receive a new voice message, the system changes the message-waiting lamp to red and displays a mail icon on the upper left-most corner of the top bar.
If you move mouse on the voice mail indicator, you can also get voice messages without any active messages.

2. Click the **Unread Message** icon and perform one of the following steps:
 - If you have integrated the voice message system with the deskphone, the system dials the voice message number and on connecting to the voice mail service, you hear voice prompts. Listen to the voice prompts and follow the instructions using the dialpad.
 - If you integrate the voice message with a third-party voice message program, the system starts the third-party voice message. You gain access to the voice mail program using the user credentials. For more information, see the user documents shipped with the voice mail program.
 - If you integrate the voice message with a web program, the system displays the corresponding website. Follow the on-screen instruction to gain access to the voice mail.

Related links

[Integrating the voice mail system](#) on page 51

[Voice Mail Integration panel field descriptions](#) on page 175

Starting an external application

To use the Launch application, you must configure the launch items in the Launch Application panel in System Settings. To configure the menu, see [Managing Launch Application](#) on page 120.

Procedure

On the action bar of Avaya one-X® Agent, click **Launch External Applications** > <**Launch item**>.

The system displays the launch application on the computer screen.

Related links

[Launch Application overview](#) on page 120

Viewing the VuStats Monitor window

The VuStats Monitor window is a separate floating window.

Before you begin

- Ensure that the administrator has assigned the VuStats feature to one or more buttons for this extension. For more information, see [Configuring an extension for VuStats](#) on page 122.

Procedure

1. On the action bar of Avaya one-X® Agent, click **VuStats Monitor**.

The VuStats window displays the VuStats information sets.
2. To view a particular set of the VuStats information, on the VuStats Monitor window, click **Options** and select the VuStats information.

The system displays the corresponding VuStats information on the VuStats Monitor window. To adjust the refresh rate and display interval, see [VuStats dialog box field descriptions](#) on page 168.

*** Note:**

The system displays the Communication Manager output for each VuStats button in one line of the VuStats monitor window.

Related links

[The VuStats Monitor window](#) on page 122

Using the Click-to-Dial feature

With the Click-to-Dial feature, you can use the mouse device to automatically dial a properly formatted deskphone numbers that appear on web pages. You can use this feature when you open a web page in Microsoft Internet Explorer, Google Chrome, or Mozilla Firefox.

*** Note:**

The Click-to-Dial feature uses the pstrings file to highlight a number. For the system to highlight a number, you must change the values in the pstring file in `C:\Program Files\Avaya\Avaya one-X Agent`. The first line in the pstrings file represents the minimum and maximum length of the number to highlight. The second line is a regular expression. The Click-to-Dial feature determines whether to highlight a particular number or not depending on the regular expression.

For example,

```
(\[+ [01] ?-?\.\.? )?(? \d{3} \) ?-?\.\.? ? \d{3} -?\.\.? ? (\d{4} | [A-Z] {4} )
```

In the example,

- \d is character class digits
- [] is specific range of characters
- { } is repeat previous item exactly n times
- . is period for position
- ? is match preceding character 1 or 0 times
- {3} finds preceding character n times

If the number is +44 870-907-9009

- +44 is (\+[0 1] ?-?\.\.?) the international
- 870 is (? \d{3} \) ?-?\.\.? the area code
- 907 is ? \d{3} -?\.\.? the exchange
- 9009 is ? (\d{4} | [A-Z] {4}) the last four numbers or letters

Before you begin

- Ensure that you enabled the Click-to-Dial feature during the installation.
- If you are using Internet Explorer, select the **Enabling dialing numbers from Internet Explorer** option at **System Options > System Settings > Desktop Integration**.
- If you are using Mozilla Firefox, select the **Enabling dialing numbers from Mozilla Firefox** option in **System Options > System Settings > Desktop Integration**.
- If you are using Google Chrome, select the **Enabling dialing numbers from Google Chrome** option in **System Options > System Settings > Desktop Integration**.

Procedure

1. Open a web page that contains a deskphone number to call.
The browser displays and highlights any formatted deskphone numbers in yellow.
2. Move the mouse pointer over one of the highlighted deskphone numbers.
If the web page is an unsecured site, the mouse pointer changes to a deskphone with red. For secured sites, the cursor changes to a hand with an extended index finger.
3. Click the highlighted deskphone number.
The system automatically dials the selected deskphone number from the web page.

Related links

[Desktop Integration panel field descriptions](#) on page 174

Click-to-Dial support for Mozilla Firefox 34 or later

Avaya one-X® Agent supports the Click-to-Dial feature for Mozilla Firefox 34 or later. You can include the Click-to-Dial feature for Mozilla Firefox at the time of installing Avaya one-X® Agent.

To install the Mozilla Firefox add-on, you must enable the Click-to-Dial Firefox integration during the installation of Avaya one-X® Agent. You must close all instances of Mozilla Firefox and restart Mozilla Firefox to get the Click-to-Dial plug-in active. You can verify the Avaya Click-to-Dial 1.0 plug-in in the extension list at **Mozilla Firefox > Add-ons > Extensions**.

Click-to-Dial Enhanced Protected Mode support for Internet Explorer 10 and 11

Avaya one-X® Agent supports the click-to-dial feature for Enhanced Protected Mode support for Internet Explorer 10 and 11. You can include the Click-to-Dial feature for Internet Explorer at the time of installing Avaya one-X® Agent. You must close all instances of Internet Explorer and restart Internet Explorer to get the Click-to-Dial plug-in active.

The following is Internet Explorer behavior in Avaya one-X® Agent:

- Use the Click-to-Dial feature on Internet Explorer with Enhanced Protected Mode and 64-bit processes for Enhanced Protected Mode at **Internet Options > Advanced > Security**.

- View the extension listed on **Internet Explorer > Manage Add-ons** user can disable the extension.

The option to enable or disable the Dialing Numbers is available at **System Settings > Desktop Integration**. Upon enabling or disabling the feature, agents must refresh the web page for the settings to take effect. If the dialing numbers are highlighted and if an agent disabled the feature and then clicked the number, the system dials the number. Agents must refresh the web page each time after enabling or disabling the feature.

- See the telephone numbers highlighted with yellow background on the Internet Explorer web page after the system launches the web page and updates the complete data.
- Hover over mouse highlighted number and can see mouse cursor style changing to pointer.
- Click the numbers highlighted in yellow background on the Internet Explorer web page and number is dialed from Avaya one-X[®] Agent.
- Edit or add a registry value **HKLM > SOFTWARE at Avaya > Avaya one-X-Agent > Settings > IgnoredHtmlTags** for ignoring the specific HTML text nodes while parsing the web page content for deskphone numbers. Every node belongs to a specific HTML tag. Agents can provide the comma separated lists of these HTML tags as value such as **noscript, option, or title**.
- For the Click-to-Dial functionality to work on the Internet Explorer web page, Avaya one-X[®] Agent must be running and logged in.

Click-to-Dial feature for Google Chrome

Avaya one-X[®] Agent supports the Click-to-Dial feature for Google Chrome. You can include the Click-to-Dial feature for Google Chrome at the time of installing Avaya one-X[®] Agent. You must close all instances of Chrome and restart Chrome for the click-to-dial extension to work.

Google Chrome functions in the following way in Avaya one-X[®] Agent:

- The extension works in enterprise domain computers only.
- You can view the extension listed on the Google Chrome webpage at `chrome://extensions/`.

You cannot disable the click-to-dial extension due to policy limitation.

- The option to enable or disable the Dialing Numbers feature is available at **System Settings > Desktop Integration**. Upon enabling or disabling the feature, you must refresh the web page for the settings to take effect. If the dialing numbers are highlighted and you have disabled the feature and then clicked the number, the system dials the number. You must refresh the web page each time after enabling or disabling the feature.
- You can see the telephone numbers highlighted with yellow background on the Google Chrome web page after the system launches the web page and updates the complete data.
- You can hover the mouse over on the highlighted number to see the cursor style changing to a pointer. The system does not display tool tip when you hover on the highlighted phone number. This relates to Click-To-Dial for Internet Explorer.

- You can add or update the existing regular expression in the `Pstring` file to highlight the phone numbers. You must restart Avaya one-X® Agent for the `pstrings` file content to take effect. For web page to highlight the phone number, refresh the web page.
- You must edit or add a registry value in the `IgnoredHtmlTags` registry file for the system to ignore the specific HTML text nodes while parsing the web page content for phone numbers. The location to add or edit the registry file is **HKLM > SOFTWARE\Avaya > Avaya one-X-Agent > > Settings > > IgnoredHtmlTags**.
- Each node belongs to a specific HTML tag. You can provide the comma separated lists of these HTML tags as value, such as `noscript`, `option`, or `title`.

The system ignores the `Textarea`, `Script`, and `style` HTML tags by default irrespective of whether the registry entry is empty or registry entry is not present.
- You can load the extension in the Incognito window after selecting the **Allow in incognito** option next to the extension Avaya Click-to-Dial on the webpage `chrome://extensions/`. Whenever you select or clear this option, all non-incognito highlighted tabs lose connection with Avaya one-X® Agent and the system does not dial the number. You must refresh these web page tabs after selecting and clearing the **Allow in incognito** option.
- The system does not load the extension into the local HTML web page files opened with URL `file:///*/*`.
- For the Click-to-Dial functionality to work on the Google Chrome web page, ensure that Avaya one-X® Agent is running and logged in.
- Click-to-Dial for Google Chrome depends on the Avaya one-X® Agent API Service. For Click-to-Dial to work with HTTP ports, you require the necessary permission. These permissions can be given using the NETSH Microsoft tools. For details, go to <https://downloads.avaya.com/css/P8/documents/100069896>.
- At the time of service pack installation, if Google Chrome is not installed and you want to use this feature by installing the Google Chrome browser, remove the service pack and reinstall the service pack with the **Enable Click to Dial in Chrome** option.

Signing out as an agent

You can sign out of the ACD service when you finish the work for the session. However, you can handle direct calls from agents in the contact center or from callers outside the contact center.

Procedure

On the top bar of Avaya one-X® Agent, click **Agent Status > Logout**, and select the appropriate reason code from the list, if available.

The system logs you out of the ACD server with the reason code indicating that you are unavailable for ACD calls. You can log in again by clicking the **Login Agent** option. If you try to log out of an active call, the system logs you out of the ACD service only after you end the call.

Quitting the Avaya one-X® Agent application

Procedure

On the upper-right corner of the top bar, click **Exit Application**.

Chapter 9: The Contact List window

Use the Contact List window to add a group of related contacts to the contact list of one or more agents or supervisors. You can create any number of contact lists in Avaya one-X[®] Agent.

The Contact List window contains the list of Avaya customers, prospective customers, vendors, and Business Partners. Each contact record contains contact information. You can add information, such as, business type, account, or any other category. Contact list stores the name, deskphone numbers, and address of each contact. You can also tag a contact to a favorite list or add to the speed dial list.

 Note:

Avaya one-X[®] Agent might also import the contact list from an Avaya IP Agent installation when you open the Avaya one-X[®] Agent application for the first time.

Viewing contacts

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **Contact List**.

The system displays the Contact List window with each record.

2. To view the contacts, perform one of the following actions:

- To view the list of contacts, from the **Show** field, select **All contacts**.
- To view contacts marked as favorite, from the **Show** field, select **Favorites**.

You can identify contacts marked as favorites with a star icon.

You can also save a contact to the favorite list or to the speed dial list. To tag a contact as favorite, right-click a contact and select **Tag > Favorite**.

- To view contacts in the speed dial list, from the **Show** field, select **Speed Dial**.
- To save a contact to the Speed Dial list, right-click a contact and select **Tag > Speed Dial**.
- To view contacts marked as My contacts, from the **Show** field, select **My Contacts**.

3. To close the Contact List window, at the upper-right corner of the Contact List window, click **Close**.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Creating a new contact

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.
2. At the bottom of the Contact List window, click the plus sign (+).
3. In the Contact Details dialog box, complete the fields and click **OK**.

You must complete the fields highlighted in red to add a contact to the list.

The system displays the newly created contact in the Contact List window. For more information about the Contact Details dialog box field descriptions, see [Contact Details dialog box field descriptions](#) on page 107.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Contact Details dialog box field descriptions

The Contact Details dialog box provides the following fields.

The system marks the mandatory fields with an asterisk (*) mark.

Name	Description
Favorite	Save the contact to the favorite list.
Speed Dial	Store the contact in the Speed Dial list. If you select this option, the system displays checkboxes against the Work , Mobile , Home , and IM fields. You can select the options to add the numbers to the Speed Dial list.
First Name	Type the first name of the contact.
Last Name	Type the last name of the contact. You can also Type the name of an organization optionally.
Work	Type the office deskphone number of the contact. The system uses the work deskphone as a default phone.

Table continues...

Name	Description
	The system displays a check box if you select the Speed Dial option. You can use this option to include the work number in the speed dial list.
Mobile	<p>Type the mobile number of the contact. Select this option against this field to include the mobile number in the speed dial list.</p> <p>The system displays a check box if you select the Speed Dial option. You can use this option to include the mobile number in the speed dial list.</p>
Home	<p>Type the home deskphone number of the contact.</p> <p>The system displays a check box if you select the Speed Dial option. You can use this option to include the home number in the speed dial list.</p>
Email	Type an email address of the contact.
IM	<p>Type the SIP address. The SIP address can be the name and the domain of the IM contact. For example, if the contact handle is 123456 and the name of the presence server is abc, type the IM address as 123456@abc.com.</p> <p>The system displays a check box if you select the Speed Dial option. You can use this option to include the IM in the speed dial list.</p>
Company	Type the name of the company.
Address 1	Type the company address.
Address 2	<p>Type the complete the contact company address.</p> <p>This field is optional.</p>
City	Type the city name.
State	Type the state name.
Zip	Type the zip code.

Icon	Name	Description
	Favorite	The system displays this icon next to the Favorite label.
	Speed Dial	The system displays this icon next to the Speed Dial label.
	Click to Call home Click to Call Mobile Click to Call Work	The system displays the Click-to-Call icon next to the voice call fields. You can use the Click-to-Call option when you specify the voice call number in the

Table continues...

Icon	Name	Description
		<p>corresponding fields. You can click this icon to make voice calls.</p> <p> Note:</p> <p>If you select the Speed Dial option, the system displays the check boxes against the voice call fields.</p>
	Click to IM	<p>The system displays the Click-to-IM icon next to the IM field. The system displays Click to IM icon option when you assign a SIP address of the IM contact. You can click this icon to send instant message to the IM contact specified in the field.</p> <p> Note:</p> <p>If you select the Speed Dial option, the system displays a check box against the IM field.</p>

Related links

[Making a call from the Text Input field](#) on page 65
[Making a call from the Contact List window](#) on page 66
[Making a call from the Work Log window](#) on page 66
[Making a call using the Speed Dial list](#) on page 67
[Consulting a contact in the list](#) on page 68
[Making a call from the Dialpad window](#) on page 69
[Calling Supervisors from Contact List](#) on page 71
[Creating a new contact](#) on page 107
[Viewing contacts](#) on page 106
[Removing contacts from the Contact List window](#) on page 114
[Changing contact details](#) on page 112
[Importing a contact from a directory](#) on page 110

Adding a contact from the Work Log window

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **Work Log**.

The system displays the Work Log window with recent call records.

2. In the Work Log window, click the contact details to expand.
3. Click the plus button (+) next to the contact.

The system displays the Contact Details dialog box.

4. Type the appropriate information on the Contact Details dialog box.
5. Click **OK**.

Related links

[Work Log panel field descriptions](#) on page 173

Overview of on importing contacts

You can import a contact from the Microsoft Outlook contacts or a public directory to the Avaya one-X[®] Agent contact list. To import a contact from Microsoft Outlook contacts, you or your system administrator must have configured the exchange server address in the System Settings dialog box. To import a contact from a public directory, you or your system administrator must have defined the public directory service.

Importing a contact from a directory

Before you begin

Define the corporate directory. For more information, see [Defining a Public Directory service](#) on page 138.

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **Contact List**.
2. At the bottom of the Contact List window, click **Advanced Search**.
3. In the Advanced Search window, perform the following actions:
 - a. From the **Search in** drop-down list, select **Directory**.

The system displays the Directory option.
 - b. From the **Field** drop-down field, select an appropriate option to refine your search.
 - c. Select the **Enable Predictive Search** option for the system to begin the search automatically and display the results on typing first two character in the **Search** field.

When you start typing in the **Search** field and content length is more than two characters, then system begins to search automatically and displays the results. Meanwhile during search in progress, the system displays the *Searching...* message.
 - d. To get faster results, select a criterion from the **Criteria** drop-down list.

The system searches and displays the results based on the selection of the **Criteria** drop-down list.

- e. In the **Search** field, type a valid string to search within the selected data field.

When you select this option, do not enter * in the **Search in** field of the Advance Contact Search window. The system displays the list of contacts matching the search criteria.

- f. Click **Search**.

4. Select the contact from the list and click **Add to Contacts**.

The system adds the directory contact to the Contact List window.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Importing contacts from Microsoft Outlook

Before you begin

You or your administrator must configure the Microsoft Exchange Server address. For more information, see [Configuring Outlook Contact with Avaya One-X Agent](#) on page 139.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.
2. At the bottom of the Contact List window, click **Advanced Search**.
3. In the Advanced Search window, perform the following actions:
 - a. From the **Search In** drop-down list, select **Outlook Contact**.
The system displays the Microsoft Outlook contacts.
 - b. From the **Field** drop-down list, select an appropriate option to refine your search.
 - c. Select the **Enable Predictive Search** option for the system to begin the search automatically and display the results on typing first two character in the **Search** field.
When you start typing in the **Search** field and content length is more than two characters, then system begins to search automatically and displays the results. Meanwhile during search in progress, the system displays the *Searching...* message.
 - d. To get faster results, select a criterion from the **Criteria** drop-down list.
The system searches and displays the results based on the selection of the **Criteria** drop-down list.
 - e. In the **Search** field, type a valid string to search within the selected data field.
When you select this option, do not enter * in the **Search in** field of the Advance Contact Search window. The system displays the list of contacts matching the search criteria.

4. Select the contact from the list and click **Add to Contacts**.

The system adds the contact to the Contact List window.

Related links

[Outlook Contacts panel field descriptions](#) on page 140

Changing contact details

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.
2. In the Contact List window, right-click a contact and select **Edit Contact**.
3. In the Contact Details dialog box, change the fields, as appropriate.
4. Click **OK**.

The system updates the corresponding fields for the contact.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Finding a contact

About this task

Avaya one-X® Agent provides a basic search mechanism to find a contact in the contact list.

Use the following procedure to search a contact name or a deskphone number.

Procedure

1. On the action bar of Avaya one-X® Agent, change the **Work Options** menu to **Search Contacts**.
2. In the **Text Input** field, enter the contact name or a deskphone number.

As you type, the system displays the character records that match the character you type. You can refine your search using a combination of **Show** and **View** fields in the Contact List window.

Note:

The character-by-character filtering is available only for contacts in the Contact List window.

3. To optimize your search, perform the following actions:
 - a. At the bottom of the Contact List window, click **Advanced Search**.

The system displays the Advanced Search window.

- b. In the **Search in** field, select **Contacts**.

The system displays the list of local contacts.

- c. From the **Field** drop-down list, select an appropriate option to refine your search.
- d. Select the **Enable Predictive Search** option for the system to begin the search automatically and display the results on typing first two character in the **Search** field.

When you start typing in the **Search** field and content length is more than two characters, then system begins to search automatically and displays the results. Meanwhile during search in progress, the system displays the *Searching...* message.

- e. To get faster results, select a criterion from the **Criteria** drop-down list.

The system searches and displays the results based on the selection of the **Criteria** drop-down list.

- f. In the **Search** field, type a valid string to search within the selected data field.

When you select this option, do not enter * in the **Search in** field of the Advance Contact Search window. The system displays the list of contacts matching the search criteria.

The system queries the service and displays the result.

Tagging a contact as a favorite

If you have a large list of contacts, you can save contacts in the favorite list and access the frequently used contacts quickly.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.
2. In the Contact List window, right-click a contact and select **Tag > Favorite**.

The system tags the contact as favorite.

Adding a contact to the Speed Dial list

You can save a contact to the Speed Dial list and use the contact to gain access to speed dial entries at the time of:

- Adding a call to Work Item,
- Adding a participant during conference, or

- Transferring the call from the menu.

+ Tip:

Use the Speed Dial option to contact experts in the contact center who frequently assist you during an active call.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.
2. In the Contact List window, right-click a contact and select **Tag > Speed Dial**.

The system adds the contact to the Speed Dial list.

Removing contacts from the Contact List window

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.
2. In the Contact List window, right-click a contact and select **Delete Contact**.

You can select one or more contacts from the Contact List window by holding down the **Control** key and selecting contacts.

The system displays the Delete Confirmation dialog box.

3. Click **OK**.

The system removes the selected contact or contacts from the Contact List window.

Related links

[Contact Details dialog box field descriptions](#) on page 107

Chapter 10: The Work Log window

The Work Log window keeps the call records for incoming calls, outgoing calls, and instant messages. A single call record contains contact name, telephone number, date/time, and call duration. Further, each call record contains dialed DTMF number, screen pop name, and work code details, as available and applicable.

Viewing the Work Log window

The Work Log window displays the records of calls, instant messages, TTY, screen sharing, conferences, missed calls, and agent state changes with full information, as applicable and available. Each call record includes the name, number, date and time, and duration. You can set the options to view call records by date or by call type.

Note:

You can configure the Work Log window to record the type of calls the system must record, specify the number of days the system must keep the work record in the history, and set the number of work logs the Work Log window must display for each screen. The option to configure these settings is available in **System Options > System Settings > Work Log**.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Work Log**.
2. To view records by date, perform any one of the following actions:
 - To view all call records, from the **Show** field, select **All Entries**.
 - To view the call records of that particular day, from the **Show** field, select **Today**.
 - To view the call records of the previous day, from the **Show** field, select **Yesterday**.
 - To view the records of the current month, from the **Show** field, select **This Month**.

The system displays the instances of work logs matching the criteria.

3. To view records by call type, perform any one of the following actions, in the Work Log window:
 - To view all types of call records, from the **View** field, select **All Contacts**.
 - To view outgoing voice call records, from the **View** field, select **Outgoing Voice**.
 - To view incoming voice call records, from the **View** field, select **Incoming Voice**.

- To view outgoing TTY records, from the **View** field, select **Outgoing TTY**.
- To view incoming TTY records, from the **View** field, select **Incoming TTY**.
- To view outgoing screen sharing records, from the **View** field, select **Outgoing Screen Sharing**.
- To view conference calls, from the **View** field, select **Conference**.
- To view missed calls, from the **View** field, select **Missed Voice**.
- To view records of agent state changes, such as, Auxiliary, After Call Work, Ready, Agent Login, and Agent Logout, from the **View** field, select **State Change**.

You can view the records of agent states in Avaya one-X® Agent but not the agent states on Communication Manager.

You can use the combination of **Show** and **View** fields in the Work Log window to optimize the view.

The system displays the instances of work logs matching the criteria.

4. Perform any one of the following actions:
 - To browse through the Work Log page sequence, at the bottom of the Work Log window, click the forward or the backward arrow button.
 - To sort the view order, click the corresponding column headings.
 - To dial or redial a call, click the corresponding call icon for the call log.
5. To close the work log window, click **Work Log** again.

Related links

[Work Log panel field descriptions](#) on page 173

Viewing log details

You can view call records such as DTMF digits, the screen name, and the work code in the work log list.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Work Log**.
2. In the Work Log window, click the arrow button to the left of the contact.

The system displays the details in the selected work log.

3. To copy the Work log details, such as Topic, Name, Number, Date-Time, DTMF, Screen POP, Work Codes, and Observing Agent details (in case of supervisor login) fields, select the text and press the **Ctrl+C** button on the keyboard.

Related links

[Work Log panel field descriptions](#) on page 173

Viewing interaction transcripts

You can view the transcripts of IM and TTY interactions on the Work Log window.

Before you begin

To view the IM and TTY transcripts on the Work Log window, you must select the **Save Transcripts** option related to the following fields on the Work Log panel:

- **Log Incoming IMs**
- **Log Outgoing IMs**
- **Log Incoming TTYs**
- **Log Outgoing TTYs**

If you clear any option in the Save Transcripts option, the corresponding entry is unavailable in the work log transcript.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Work Log**.

The system displays the Work Log window with the recent work logs.

2. Expand the work log to view the transcripts.
3. Click the view transcript icon of the expanded work log.

The system displays the interaction transcript in a new Transcript window.

Removing the work log records

About this task

Use the following procedure to remove call records from the Work Log window.

Note:

Use the aging mechanisms to control the size of the work records, and not to delete individual work records as a standard procedure.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Work Log**.
2. In the Work Log window, right-click a work log record and select **Delete Work Log Record(s)**.

You can select one or more contacts from the Work Log window by holding down the **Control** key and selecting work logs.

The system removes the work log record from the Work Log window.

Related links

[Work Log panel field descriptions](#) on page 173

Clearing the work log history

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **Settings > System Settings > Work Log**.
2. In the **Work Log** panel, click **Clear History**.
3. In the confirmation dialog box, click **OK**.

The system clears the work log records from the computer.

4. Click **OK**.

Finding a work log record

The text input field is a convenient starting point for searching a call record in the Work Log window. You can find a call record by specifying contact names and telephone numbers in the text input field.

Note:

Avaya one-X[®] Agent shares the search field with Contact List and changes contextually based on the selection.

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **Work Log**.
2. From the **Function** menu, choose **Search Contacts**.
3. In the **Text Entry** field specify. For example, you can specify a contact name, voice, IM, screen sharing, conference, or state changes.

As you type, the system dynamically displays the characters that match the result in the Work Log window. You can filter the keywords by using the combination of **Show** and **View** fields in the Contact List window.

Related links

[Searching a work log using the Advanced Search window](#) on page 118

[Work Log panel field descriptions](#) on page 173

Searching a work log using the Advanced Search window

About this task

Use the **Advanced Search** option to filter contact records or a list item in the Work Log window. You can refine your search by topic, name, number, date, date range, or transcript. Use the **Advanced Search** option to perform a comprehensive search for a call record or a group of call records in the Work Log window.

*** Note:**

The Advanced Search functionality changes depending on the search type. If you are searching for a call record, the Advanced Search options change contextually.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Work Log**.
2. At the bottom of the Work Log window, click **Advanced Search**.
3. In the Advanced Search window, perform the following actions:
 - a. In the **Search** field, select an appropriate option.
 - b. In the **View** field, select an appropriate option.
 - c. In the **Search** field, type a valid string to search within the selected data field. For example, after setting the search type to **Date**, enter 10/10/2008 in the field.

You can use an asterisk (*) as a wildcard for a string. For example, typing the string, j*n, returns all names beginning with a **J** and ending with an **N** with one or more characters in between. The character includes entries, such as John, but also entries such as Joseph Brown.

4. Click **Search**.

The system queries the records and displays all possible contacts that match the criteria in the Advanced Search window.

5. Perform any of the following actions:
 - To call a contact in the list, click **Call** for contact.
 - To sort the call record order, click the corresponding column headings.
 - To browse through the sequence of work logs pages, click the forward or backward arrow buttons at the bottom of the Advanced Search window.
 - To copy the line appearance label on dialpad, select the line appearance and press the **Ctrl +C** button on the keyboard.

Related links

[Finding a work log record](#) on page 118

[Work Log panel field descriptions](#) on page 173

Chapter 11: Launch Application overview

With the **Launch Application** menu, you can run external application.

Related links

[Starting an external application](#) on page 100

Adding a launch item

Procedure

1. On the action bar of Avaya one-X[®] Agent, select **System Options > System Settings**.
2. In the System Settings dialog box, click **Launch Application**.
3. In the **Launch Application** panel, click **Add**.

The system displays an untitled launch item in the Launch Applications list.

4. In the **Launch Application** list, click the untitled launch item and type the name for the launch item.
5. In the **File, Folder or URL to launch** field, click **Browse** to navigate either to a file name or a folder. For example, to add Microsoft Word in the Launch Application menu, navigate to C : \Program Files\Microsoft Office\OFFICE11\WINWORD.EXE.

If you select a folder or type a folder name instead of a file name, the remaining fields on the Application Launch menu remain inactive as you cannot apply these properties to browse to the launch items.

6. In the **Description** field, type a short description of the launch item.
7. (Optional) Perform the following actions:
 - To type more parameters for the third-party applications, in the **Parameter to pass** field, type more values at the command prompt.
 - To assign a default file name to run a launch item, in the **Default Directory** field, type the default directory path.

Note:

This launch item property is important for any third-party applications that require internally paths to run the program.

8. Click **Test** to verify the launch item configuration.

The program passes the filename or the browse folder, parameters, and the default directory information to the ShellExecute Windows API to determine whether the program launches according to your expectation.

Related links

[Launch Applications panel field descriptions](#) on page 170

Rearranging launch items

About this task

Perform the following procedure to change the order of the appearance of launch items in the **Launch Application** menu.

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Launch Application**.
3. In the **Launch Applications** list, select an item and perform any one of the following actions:
 - To move the selected launch item above the current position in the **Launch Application** menu, click **Up**.
 - To move the selected launch item below the current position in the **Launch Application** menu, click **Down**.

The system rearranges the selected launch item in the **Launch Application** menu.

Related links

[Launch Applications panel field descriptions](#) on page 170

Removing a launch item

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Launch Application**.
3. In the **Launch Application** panel, click **Remove**.
4. In the confirmation dialog box, click **OK**.

The system removes the selected launch item from the **Launch Application** menu.

Related links

[Launch Applications panel field descriptions](#) on page 170

Chapter 12: The VuStats Monitor window

The VuStats Monitor window periodically updates the ACD status information from Communication Manager and displays the status on the Avaya one-X[®] Agent VuStats Monitor window. You can schedule the refresh rate to monitor the transmission of the VuStats information before the VuStats Monitor window changes the focus from one VuStats line of display to the next one in the list.

This chapter explains the VuStats configuration.

Note:

Only Communication Manager administrators have privileges to assign the VuStats button to an extension.

Related links

[Viewing the VuStats Monitor window](#) on page 100

VuStat extension configuration

About this task

The VuStat feature control is similar to the VuStats button on the deskphone. You can use the VuStat feature control in the system to display and update the VuStats feature buttons for the corresponding extension or deskphone.

For the Avaya one-X[®] Agent extension to display the VuStats information, your administrator must set the following configurations on Avaya Aura[®] Communication Manager:

- Assign the extension as a telephone type. The telephone must have a display panel.
- The extension must have one or more buttons assigned with the vu-display feature. You can specify the format and ID parameters of the vu-display feature for different streams of VuStats information.
- For the Avaya one-X[®] Agent extension to display the VuStats information, your administrator must perform the following configurations on Avaya Aura[®] Communication Manager:
 - Assign the extension as a telephone type. The telephone must have a display panel.
 - Specify the format and ID parameters of the vu-display feature for different streams of VuStats information. The administrator must assign one or more buttons with the vu-display feature extension.
 - Assign multiple VuStats configurations to the buttons for this extension for different views and formats.

For more information, see *Administering Avaya one-X® Agent*.

Chapter 13: Dialpad window

Avaya one-X® Agent provides the Dual-tone multi-frequency (DTMF) generation capability. With dialpad window, you can gain access to the Avaya Aura® Communication Manager button, line appearances, and telephone display information. You can use the numeric keypad to make or receive calls from the dialpad window.

This chapter describes the dialpad management and procedures to customize favorite buttons, create touchtone short cuts, and assign favorite buttons

Important:

Use the dialpad call control functions only if the application is cannot provide features of Avaya Aura® Communication Manager . If you use the dialpad call control function, the application can compromise the Work Item and Agent State display paradigms in the main Window.

Viewing the Dialpad window

Procedure

1. On the action bar of Avaya one-X® Agent, click **Dialpad**.
2. In the Dialpad window, perform any of the following actions:
 - To view the expanded Dialpad window, click the arrows (>>) on the right panel of the window.
 - To view the collapsed Dialpad Window, click the arrows (<<) on the right panel of the window.

The system displays the Dialpad window with a fully functional alphanumeric dial pad. To remove alphabets from the dial pad keys, go to **System Options > Agent Preferences > User Interface** and clear the **Display letters on Dialpad** check box.

3. To copy the Work log details, such as Topic, Name, Number, Date-Time, DTMF, Screen POP, Work codes, Observing Agent details (in case of supervisor login) fields, select the text and press the **Ctrl+C** button on the keyboard.

Related links

[Dialpad window button descriptions](#) on page 125

Dialpad window button descriptions

Depending on the buttons that you select in the Favorite Buttons dialog box, the application displays the corresponding buttons in the expanded Dialpad window.

To view the All Buttons menu in the dialpad, you must administer the Communication Manager station buttons.

Your administrator defines the following buttons for ACD.

Button	Description
Release	To close an active call.
Auto-In	<p>To change the agent state to the Ready state after you release the call.</p> <p> Note: You can use the Auto-In button only if you have logged in as an agent.</p>
AuxWork	<p>To change the agent status to auxiliary. When you change the status to Aux-work, the system does not route the ACD calls to your extension. For more information, see Changing your agent work status on page 95.</p> <p> Note: You can use the Aux-work button only if you have logged in as an agent.</p>
Manual In	<p>To accept ACD calls when you release a live call.</p> <p>You can use the Manual-in button only if you have logged in as an agent.</p>
AfterCall	<p>To begin the after call work timers immediately after releasing a call for post call processing. During the post call processing, the agent is not ready to accept additional ACD calls. For more information, see Completing the work on page 98.</p> <p> Note: You can use the After-call button only if you have logged in as an agent.</p>
Assist	To dial a call to the supervisor. For more information, see Calling Supervisors from Contact List on page 71.
UUI Info	To view the UUI details of the callers on a call.
Work Code	To open the Work Code panel at the bottom of the Work Item in the Work List window. For more information, see Assigning a work code on page 97.
Last-number	To dial the last called number from the Work Log window.
Normal	To make the station display into the normal call identification mode.

*** Note:**

Use the agent state buttons from a deskphone in the Desk Phone mode or click the favorite or the Dial Pad buttons. However, the Avaya one-X® Agent client can operate from these favorites for user required features or from the button bar on the main user interface.

Related links

[Viewing the Dialpad window](#) on page 124

Creating the touchtone shortcuts

About this task

Use the following procedure to create a touchtone number and to use the number as a shortcut in the Dialpad window.

You can use touchtone numbers/touchtone shortcuts to store a DTMF login to a voice mailbox or to run DTMF in band Network Call Transfer functions that your network service provider provides.

Procedure

1. From the top bar of Avaya one-X® Agent, click **Settings > System Settings**.
2. In the System Settings dialog box, click **Touch-Tone Shortcuts**.
3. Click **Add**.

The system displays an untitled item in the Touch-Tone Shortcuts list.

4. In the **Touch Tone Shortcuts** list, double-click the untitled item and specify the touchtone name of the touchtone shortcuts.
5. In the **Phone Number** field, type a valid deskphone number and include the asterisk (*) or the number (#).

The phone number can be an extension number, a PSTN number, or a mobile number.

6. Click **OK**, and close the System Settings window.

The system saves the touchtone number in the Touch-Tone Shortcuts list. The new deskphone number is available as a touchtone Shortcut in the dialpad window.

Related links

[Touch Tone Shortcuts panel field descriptions](#) on page 179

Customizing the favorite buttons

You can use the menu to gain access to all feature buttons for the registered extension. Avaya one-X® Agent provides options to customize favorite buttons to appear on the expanded Dial Pad view.

You can add up to eight feature buttons, including the touchtone shortcuts, as favorites. All buttons give you menu to gain access to all feature buttons for the registered extension. These buttons also appear on the button bar of the main user interface, if you activate the option to display this bar in the Agent Preferences dialog box.

Any buttons available as features or as touchtone shortcuts are defined at the time of customizing the favorite buttons. If an agent moves to another extension using the same User Profile, the Communication Manager button features change and bases the buttons on the new extension. The Favorite Communication Manager buttons (not shortcuts) may disappear if the buttons were defined for one extension and are not available on the second extension.

 Note:

Administrators must ensure that favorite buttons are available on all telephones for agents having the hot-desking option.

About this task

Use the following procedure to add or remove the favorite buttons on the expanded Dial Pad window.

Procedure

1. On the Dial Pad window, select **Settings > Select Favorite Buttons**.
You can also customize the favorite buttons from **System Options > Agent Preferences > User Interface > Select Favorite Buttons**.
2. In the Favorite Buttons dialog box, perform any of the following actions:
 - To add favorite buttons, select the appropriate button option from the left panel of the Dial Pad window.
 - To remove favorite buttons, clear the appropriate button from the right panel of the Dial Pad window.
3. Click **OK**.

The Dial Pad window displays the favorite buttons.

Related links

[Favorite Buttons dialog box field descriptions](#) on page 127

Favorite Buttons dialog box field descriptions

You can configure up to eight favorite buttons using the Favorite Buttons window.

The following are the buttons available on the Favorite Buttons window.

Button	Description
Release	To end a call in the work list window or hanging up the deskphone.
Manual In	To accept the call in the Manual Accept mode.
Auto In	To accept the call in the Auto-Accept mode.
AfterCall	To wrap up the call in the ACW mode.
AuxWork	To set the agent status to the auxiliary mode. Use the AuxWork button to decline an ACD call.
Assist	To dial a call to the supervisor. Use the Assist button to make a call to the supervisor directly.
Work Code	This button is equivalent to assigning a work code to the work item in the Work List window. Use the Work Code button to assign a work code to the work item.
Last-numb	With the last-numb button, you can redial the previously dialed number.
Normal	To click the Normal button to put the station display into the normal call identification mode.

Related links

[Customizing the favorite buttons](#) on page 126

Chapter 14: Agent Greetings

With the Greetings feature, you do not have to repeat the same greeting at the beginning of each call. When you accept an ACD call, the system mutes your microphone and plays the selected greeting. After playing the greeting, the system unmutes the microphone so that you can talk to the called party. You can configure agent greetings to play only for specific deskphone numbers or VDNs from which calls originate. For example, reviewing the standard terms and conditions of a transaction or sale that is about to complete and playing the greeting, the recording manually on demand.

This chapter describes how to record, start, change, or delete a greeting. You can learn how to configure a greeting to play for a specific VDN and ANI.

Recording an agent greeting

You can record greetings and use the greetings when answering calls.

Before you begin

You must:

- Change the agent status to Auxiliary or log out of the ACD server to prevent incoming calls when you are recording the greeting
- Connect the headset to the computer.

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **System Options > Agent Preferences**.
2. In the Agent Preferences dialog box, click **Record Greetings**.
3. In the **Record Greetings** panel, click the plus button (+).

The system displays a new greeting in the **Record Greetings** list.

4. Select the newly added greeting and click **Record**.

When you select this option, the system begins to record the audio.

5. Speak the greeting into the headset microphone.
6. When you completing recording your greeting, click **Stop**.
7. Click **Play** to test or listen the recording.

8. To arrange Agent Greetings in the list:
 - a. Select an agent greeting.
 - b. Click the **Up** or **Down** button, as appropriate.
9. Click **OK**.

Related links

[Playing recorded greetings manually](#) on page 96
[Setting Greeting Triggers activation criteria](#) on page 131
[Activating a recorded greeting](#) on page 52
[Record Greetings panel field descriptions](#) on page 157

Activating a recorded greeting

You must activate the Record Greetings option for the system to play the greeting. You can active more than one greeting simultaneously.

For example, you can activate multiple greetings if each greeting has a unique Vector Directory Number (VDN) as the activation criterion. You can activate multiple greetings for agent greetings that play for specific Automatic Number Identification (ANI) deskphone numbers or Prompted Digits.

If two recorded greetings meet the same criteria that make greetings eligible for a single call, Avaya one-X® Agent chooses the first one on the search list.

Before you begin

Ensure that the system has at least one recorded greeting.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, select **Greetings Triggers**.

The system displays the **Greetings Triggers** panel.

3. In the **Greetings Triggers** list, select a greeting.
4. Click **OK**.

You can manually play the selected greeting for the incoming call.

Related links

[Greetings Triggers panel field descriptions](#) on page 166
[Setting Greeting Triggers activation criteria](#) on page 131
[Recording an agent greeting](#) on page 129
[Record Greetings panel field descriptions](#) on page 157

Setting Greeting Triggers activation criteria

Before you begin

You must have at least one greeting in the Agent Greeting list. For more information, see [Recording an agent greeting](#) on page 129

About this task

Use the following procedure to configure the agent greeting to play for a specific VDN or ANI properties of an agent greeting.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, select **Greetings Triggers**.
3. In the **Greetings Triggers** list, select the appropriate trigger.
4. From the **Auto Play** drop-down field, choose an appropriate settings.
5. For the system to play the agent greeting for ANI numbers, perform the following actions:
 - a. Enable the **Match ANI Digits** option.
 - b. In the **Match ANI Digits** field, specify the ANI digits.
 - c. In the **Match Criteria** field, specify the location in the ANI digits to find the digits. For example, if you set the **Match Criteria** to **From Right** option, the digits in the **Match ANI Digits** field must match the last digit in the ANI number for the system to play an agent greeting.
6. For the system to play the agent greeting for incoming VDN numbers, perform the following actions:
 - a. Click the **Match VDN Digits** check box.
 - b. In the **Match VDN Digits** field, specify the VDN digits.
 - c. In the **Match Criteria** field, specify the location in the VDN digits to find the digits.
7. For the system to play the agent greeting for incoming prompted digits, perform the following actions:
 - a. Click the **Match Prompted Digits** check box.
 - b. In the **Match Prompted Digits** field, specify the prompted digits.
 - c. In the **Match Criteria** field, specify the location in the prompted digits to find the digits.
8. Click **OK**.

Related links

[Activating a recorded greeting](#) on page 52

[Recording an agent greeting](#) on page 129

[Record Greetings panel field descriptions](#) on page 157

Changing a greeting

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > Agent Preferences**.
2. In the Agent Preferences dialog box, click **Record Greetings**.
3. In the **Agent greetings** panel, to rerecord an agent greeting:
 - a. Select an appropriate agent greeting in the **Recorded Greetings** list, and click **Record**.
 - b. Record greetings.
 - c. When you finish the recording, click **Stop**.
 - d. Click **Play** to test the recording.
4. To arrange an agent greeting in the list:
 - a. Select the agent greeting to change.
 - b. Click the **Up** or **Down** button as appropriate.
5. Click **OK** to save the changes.

The system applies the changes and updates the selected greeting.

Related links

[Record Greetings panel field descriptions](#) on page 157

Deleting a greeting

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > Agent Preferences**.
2. In the Agent Preferences dialog box, click **Record Greetings**.
3. In the **Record Greetings** panel, select the greeting and click the minus sign (-) .
4. In the confirmation dialog box, click **OK**.

The system removes the selected greeting from the list.

Related links

[Record Greetings panel field descriptions](#) on page 157

Avaya Switcher II headset support for Desk Phone and Other Phone

If you are working on a Windows XP computer with Service Pack 2, use the Avaya Switcher II headset to listen to the agent greetings. The Other Phone and the Desk Phone configurations support agent greetings if you use an Avaya Switcher II headset.

For information about using the Avaya Switcher II headset, go to www.plantronics.com/media/.

Chapter 15: Screen Pop overview

Screen Pop is the screen that Avaya one-X Agent displays with predefined customer information based on incoming call parameters. Avaya one-X® Agent can display a screen pop using a Web browser while answering an incoming call. You can pass the Calling Number, VDN, UUI, or digits to the Screen Pop program to customize how the content must appear on the system.

Creating a screen pop

You can configure a Screen Pop for incoming and outgoing calls and to open a desktop application. For example, a client database, a trouble ticket application, a custom application to open a remote application containing reference to a web application, and other call-related data in a web program format.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options > System Settings**.
2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** panel, click **Add**.

The system displays an untitled item in the Screen Pop list.

4. In the **Screen Pop** list, click the untitled item and rename the untitled item.
5. In the **Address or URL of program** field, perform one of the following actions:
 - To open a remote application containing reference to a web application as a Screen Pop, type a valid web address.

Note:

The URL can be CGI scripts, Java scripts, or any other web-based tools. To view a URL on a telephone number parameter, the example must contain one of the Avaya one-X® Agent (%) parameters as `http://mycompany.com/data?tel=%m`. The format of the URL depends on the data and format of the web program.

- To use a Windows application as a screen pop, specify a valid directory path. For example, type `C:\Program Files\Adobe\Acrobat 7.0\Acrobat\Acrobat.exe`.

*** Note:**

The application can be a file name with an extension specified in Windows Registry, for example, .html, .doc, or .txt extensions. If you specify an extension that is not specified in Windows Registry, the system displays an error message.

6. In the **Address or URL of Program** field, click the arrow button to include information as parameters with the URL string.

Each call might contain a remote party name, remote party number, prompted digits, or UUI. Use any of the following parameters to get the caller information:

- %n: This parameter passes the name of the other party on the call, if available.
- %m: This parameter passes the number of the other party on the call, if available.
- %p: This parameter passes the digits the caller selected while processing the call through a vector, if available.
- %v: This parameter passes the VDN name through which the system connected the call.
- %w: This parameter passes the VDN number for session initiation protocol (SIP) through which the system connected the call.
- %u: This parameter passes the UUI information from a centralized application.

*** Note:**

Avaya one-X[®] Agent supports a maximum 32 bytes of UUI information because CM can only send maximum 32 bytes for UUI information.

- %s: This parameter passes the time when Avaya one-X[®] Agent received the call from a phone.
- %d: This parameter passes the current date when Avaya one-X[®] Agent received a call from a phone.

The references are available on the screen by clicking the arrow (>) button at the end of the parameter or the URL window. You must select one of the menu items to insert in the text box. You can also specify the Prompted Digit (%p) and User To User Info (%u) parameters manually within the URL address string. For example, type `http://www.mycompany.com/data?tel=%p`.

7. Click **Test** to verify the configuration of the selected Screen Pop.
8. To indicate when the application must trigger the Screen Pop for inbound calls, from **Trigger when an inbound call is**, select the appropriate trigger.
9. To indicate when the application must trigger the Screen Pop for outbound calls, from **Trigger when an outbound call is**, select the appropriate trigger.
10. To open a Screen Pop application for a specific VDN, select **Trigger only when VDN is** and type a VDN in the field that supports the screen.

If, through Avaya Aura[®] Communication Manager, you assign VDN names with more than 15 characters, the screen pop might match multiple VDN names. To avoid this situation, do not create VDN names longer than 15 characters.

11. Click **OK**.

The system saves the settings and uses the selected Screen Pop for any subsequent call, if applicable.

Related links

[Screen Pop panel field descriptions](#) on page 168

Starting a screen pop

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **Settings** > **System Settings**.
2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** panel, click the screen pop that you want to start.

The system activates the selected Screen Pop.

4. Click **OK**.

Related links

[Screen Pop panel field descriptions](#) on page 168

Changing a screen pop

Procedure

1. On top bar of Avaya one-X[®] Agent, click **System Options** > **System Settings**.
2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** list, select a screen pop.
4. Apply the necessary changes.
5. Click **OK**.

Related links

[Screen Pop panel field descriptions](#) on page 168

Deleting a screen pop

Procedure

1. On the top bar of Avaya one-X[®] Agent, click **System Options** > **System Settings**.

2. In the System Settings dialog box, click **Screen Pop**.
3. In the **Screen Pop** list, select a Screen Pop and click **Remove**.
4. In the confirmation dialog box, click **OK**.

The system removes the selected Screen Pop from the list.

5. Click **OK**.

Related links

[Screen Pop panel field descriptions](#) on page 168

Chapter 16: Managing public directory and Microsoft Outlook contacts

This chapter provides procedures to define the public directory and configure the Microsoft Outlook contacts.

Defining a Public Directory service

Public Directory provides access to corporate or public directory services. The function refers to the Lightweight Directory Access Protocol client either as LDAPv2 or LDAPv3. You must first create and configure the Public Directory service with Avaya one-X® Agent to import or search a contact in the Public Directory (LDAP).

Procedure

1. On the top bar of Avaya one-X® Agent, select **Settings > System Settings > Directory**.
2. In the **Directory** panel, perform the following actions:
 - a. Click **Add**.
 - b. Double-click the untitled item, and rename the item.
 - c. In the **Server Address** field, type the network domain or IP address of the Public Directory server.
 - d. In the **Port** field, type 389 as the port number.
 - e. In the **Login** field, type a valid user name if the Public Directory server requires authorization.
 - f. In the **Password** field, type the password.

If you are unsure of the settings of the Public Directory server, contact the administrator of that system.

- g. In the **Search Root** field, specify an LDAP format string representing the information type.

For example, `ou=people, o=mycompany.com` indicates that the system used information under the organization unit of “people” within the organization of “mycompany.com” for the search.

For information about Base DN or Search Root strings, see the documentation for your LDAP system and company database configuration.

- h. In the **Time Out** field, specify the search time out in seconds, for example, type 30.
 - i. In the **Max Entry** field, specify the maximum entry to return, for example, 1234.
 - j. In the **Bind Options** field, choose an appropriate option.
3. Click **OK**.

The system creates a public directory to the list of available services and closes the Directory dialog box.

Related links

[Directory panel field descriptions](#) on page 171

Importing Outlook Contacts

You can import contacts from Outlook Contacts if you configure the Exchange Server address with Avaya one-X[®] Agent.

Procedure

1. On the top bar of Avaya one-X[®] Agent, select **Settings > System Settings > Outlook Contacts**.
2. In the **Outlook Contacts** panel, perform the following actions:
 - a. In the **Exchange Server Address** field, type the Outlook Exchange Server address.
You can get the exchange server address from the email account dialog box.
 - b. In the **User Name** field, type a valid user name.
 - c. In the **Password** field, type the password.
If you are unsure of the settings of the Public Directory server, contact the administrator of that system.
 - d. In the **Domain** field, type the domain name.
 - e. In the **Time Out** field, specify the search time out in seconds, for example, type 30.
3. Click **OK**.

Related links

[Outlook Contacts panel field descriptions](#) on page 140

Outlook Contacts panel field descriptions

The Outlook Contacts panel contains the following controls:

Name	Description
Exchange Server Address	To type the exchange server address.
User Name	To type the login name to gain access to the exchange server address if the exchange server requires authorization.
Password	Use this field to type the password.
Domain	Use this field to type the domain name of Exchange Server.
Timeout	Use this field to specify the time out interval in seconds for the search to expire. For example, type 200.

Related links

[Importing contacts from Microsoft Outlook](#) on page 111

[Importing Outlook Contacts](#) on page 139

Deleting a Public Directory service

Procedure

1. At the bottom of the Contact List window, click **Advanced Search**.
2. In the Advanced Search dialog box, click **Options > Directory Settings**.
3. From the **Directory** menu, select **Remove**.
4. In the confirmation dialog box, Click **Yes**.

The system removes the public directory from the directory service.

5. Click **OK**.

Related links

[Directory panel field descriptions](#) on page 171

Organizing the Advanced Search fields

You can select fields from the public directory service or Microsoft Outlook contacts in the Search Public Directory window to add to the **Advance Search** field.

About this task

Use the following procedure to organize the Search Public Directory window.

Procedure

1. At the bottom of the Contact List window, click **Advanced Search**.
2. In the **Available Fields** list, highlight the field to add to the Advanced Search window.
You can highlight multiple fields in this list box by holding down the **control** key and clicking the cursor on each field name.
3. Select the arrow button (>) to move the selected field to the **Show fields in this order** list box.
Use the left arrow button (<) to remove the highlighted field from the **Show fields in this order** list box. Use the double arrow buttons (<< and >>) to move all fields from one list box to the other.
4. To change the order of the fields in the **Show fields in this order** list box:
 - a. Highlight the field to move.
 - b. Use the **Up** and **Down** buttons, as appropriate.
5. Click **OK**.
You must run a new query to view the selected fields and the order.

Chapter 17: Phone numbers overview

To log in to Communication Manager as an offsite agent, you can add a new deskphone number, a mobile phone number, or an extension to the Other Phone configuration.

This chapter explains procedures to manage telephone numbers.

Adding a new telephone number

Before you begin

You must:

- Define the Dialing Rules properties correctly.
- Not prefix the codes to the new telephone number.

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options** > **System Settings**.
2. In the System Settings dialog box, click **Phone Numbers**.
3. In the **Phone Numbers** panel, perform the following actions:
 - a. Click **Add**.
 - b. Click the untitled item and rename the item.
 - c. Type a valid phone number.

The phone number can be an extension number, a PSTN number, or a mobile number.

4. Click **OK**.

The system saves the new phone number in the phone list.

Related links

[The Phone Numbers panel field descriptions](#) on page 164

Modifying the name and phone number

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options** > **System Settings**.
2. In the System Settings dialog box, click **Phone Numbers**.
3. To add a name to the untitled phone number in the **Phone Numbers** list, click the untitled item and name the item.
4. To change the telephone number, in the **Phone Number** field, enter a new phone number.
5. Click **OK** to save the settings.

The system updates the corresponding fields.

Related links

[The Phone Numbers panel field descriptions](#) on page 164

Deleting a deskphone number

Procedure

1. On the top bar of Avaya one-X® Agent, click **System Options** > **System Settings**.
2. In the System Settings dialog box, click **Phone Numbers**.
3. In the **Phone Numbers** panel, highlight a deskphone number, and click **Remove**.

The system displays a confirmation dialog box.

4. In the confirmation dialog box, click **OK**.

The system removes the number from the phone number list.

Related links

[The Phone Numbers panel field descriptions](#) on page 164

Chapter 18: Desktop sharing feature

Using the Desktop Sharing feature, you can share the desktop and the application running on the desktop. You can also consult with other agents or supervisors. During an active call with an agent, you can share the desktop by clicking a button. As you can share the desktop during an active call, you do not have to specify the ID of the recipient. This feature also serves as an effective data sharing tool.

Click to share menu

The system displays the **Click to share** menu as a work item object. With this menu, you can share the desktop with the corresponding agent on call. The program displays the menu in the work item window when you receive a call or call an agent in the enterprise network.

Shared desktop window

The Shared desktop window has limited controls. The Shared desktop window provides the following controls:

- The **End Screen Sharing** button to end the desktop sharing
- The **View** menu to select the correct window size.
- The **Duration** indicator tracks the time that elapsed in desktop sharing.
- The **Share source** menu indicates to show the source of the shared desktop.

In Windows 7 and later, if you share the desktop and the computer goes to the Sleep or Hibernation mode, the system closes the Desktop Sharing window and displays an error. When you wake the computer from the Sleep or Hibernation mode, you must log in to the IM window to start the IM session.

Related links

[Starting desktop sharing](#) on page 144

[Ending desktop sharing](#) on page 145

Starting desktop sharing

Before you begin

- Agents must be on an active call for desktop sharing
- Both agents must be on a call through Avaya one-X® Agent.
- Presence Services, a telephone call, and the other end of the initiator must have the far end user.

Procedure

1. To share the desktop, start a telephony call to the agent.

The system displays the call work item on the work item window.

2. On the call work item, select **Click-to-share > Share Desktop** menu.

The system adds a **Share screen** object and **Screen Control** and **End Screen Sharing** buttons under the call.

3. Click **Screen Control**.

The system sends a desktop sharing request to the recipient and displays a **Share Screen** object and an **Accept Screen Share** button on the work item window of the recipient. The recipient must click **Accept Screen Share**

When the recipient accepts the call, the recipient can view the desktop

Related links

[Desktop sharing feature](#) on page 144

Ending desktop sharing

Procedure

To end the desktop sharing session, during an active call, click **End Screen Share** on the application or the Share window. Only an agent on a call can click the End Screen Share button.

The system closes the Share window.

Related links

[Desktop sharing feature](#) on page 144

Chapter 19: Supervisor desktop

Supervisors use number of different tools to conduct regular service observing and grant access to agents. Avaya one-X® Agent provides new features for supervisors to perform these functions through the same Avaya one-X® Agent user interface. The new features integrate telephony, presence, instant messaging, media file sharing, agent monitoring, reporting, and Communication Manager supervisor features and provide the features on the Avaya one-X® Agent user interface.

Important:

Ensure that supervisors do not log in to ACD and observe other agents simultaneously. This scenario causes a potential conflict from calls originating from two different sources. Communication Manager does not support certain functions, such as, switching to Auxiliary state when observing an agent.

Related links

[Observing agent service](#) on page 146

[Sending a quick alert](#) on page 147

[Coaching an agent](#) on page 148

[Barging into an agent call](#) on page 149

[Performing a call transfer](#) on page 149

[Logging out an agent from supervisor desktop](#) on page 150

[Viewing the agent work log and transcripts](#) on page 150

Observing agent service

With the Service Observing feature, a supervisor can observe performance of an agent on any particular call and unobserved. The Service Observing feature is a Communication Manager feature and Avaya one-X® Agent optimizes the computer of the supervisor to gain access in a single click.

A supervisor can listen in or barge in to the agent-customer interaction using this feature. If the administrator has enabled this service, the system displays the observing icon as a work item on the supervisor's Avaya one-X® Agent user interface. The supervisor, performing service observing, can view the agent name and period of observation. The Service Observing work item shows the observing agent name, period of observation, and the corresponding topic. However, for direct calls, the system displays only the agent's name. When you expand the topic, the contact log window displays the binocular icon with observing the name of the agent and corresponding details.

Before you begin

- The agent must be a member of the designated supervisor team as administered in Central Management and listed in the supervisor's contact list.
- You must log in as Supervisor in to Station. If you have logged in as extension, the system dims the Observe Agent icon. Thus, disabling the Observe Agent option for agents.

About this task

When an agent sets the Observing option for an agent, the system disables all telephony controls, namely, conference, voice call, and click-to-call options. A supervisor can, however, use the IM feature. In other words, Avaya one-X® Agent assumes that the supervisor is dedicated to this function for this particular agent.

Procedure

1. On the action bar of Avaya one-X® Agent, click **Contact List**.

The system displays the Contacts window.

2. Click **Service Observing** against an agent.

The system displays the **Service Observe** menu with an observing icon. The system indicates that the selected agent is in the observation mode.

Important:

The observed agents do not receive any notification about the service observation. The agent can continue the conversation without interference from the supervisor if administered for audio notification in Communication Manager or from the agent's Avaya one-X® Agent user interface.

3. To view a work item of the corresponding agent, on the **Service Observe** menu, click **Observe Agent**.
4. To stop the observing the agent, in the Contact List window, click **Stop Service Observing**.
5. To view the service observing record, in the Contact Log window, click the call log with the binocular icon.

The system displays the Observing agent's record with the agent name and corresponding details.

Related links

[Supervisor desktop](#) on page 146

Sending a quick alert

Quick alert is a specialized messaging capability based on IM for supervisors. A quick alert to the group or to an agent does not appear in an IM window of the receiver and does not trigger any response. You can use this feature to send important messages or reminders to an observed agent while the agent is on a call. The quick alert messages appear on the top bar of Avaya one-X® Agent.

Agents can respond to the message using IM. However, supervisors can use the quick alert option to send one way messages to the agent during a service observing session.

About this task

Use the following procedure to send quick alerts to all agents in the supervised agent group, to a specific agent, or to a service observing an agent.

Procedure

1. On the action bar of Avaya one-X[®] Agent, click **Contact List**.

The system displays the Contacts List window.

2. To send a quick alert, perform any of the following actions:

- To send a quick alert to a supervised agent group, click **Quick Alert** next to the group name in the contact list.
- To send a quick alert to a specific agent, click **Quick Alert** in front of the agent name in the contact list.
- If you are service observing an agent, click **Quick Alert** against the work item you are observing.

The system displays the Quick Alert window with a text box. The system does not display the active **Quick Alert** button for a specific group or contact.

3. Type the quick alert text on the Quick Alert window, and click **Send**.

The system displays the message on top bar of the Avaya one-X[®] Agent.

The **Quick Alert** button remains disabled until the agent closes the quick alert message. If you have sent the message to a group, members must close the quick alert message to select the **Quick Alert** button to respond.

Related links

[Supervisor desktop](#) on page 146

Coaching an agent

A supervisor can coach an agent while the agent is on a call with a customer. The supervisor can listen to the telephonic interaction of an agent and simultaneously engage in a coaching session using instant messaging (IM). Unlike quick alert, an agent can respond to the supervisor's messages on the IM window.

Procedure

1. Start a service observing session for the agent.
2. On the Service Observing work item, click **Coach**.

The system initiates an IM session with the selected agent and the agent hears an alert tone while on the call.

The screen focus shifts to the IM window for both the supervisor and the agent. If you have set automated responses for IM messages, you must exchange these messages first. The system displays the **Observe agent** icon on the agent IM window where coaching is in progress.

3. Type your message in the **Message entry box** of the IM window, and press `Enter` or click **Send** to send your message.

If you are working with multiple IM users, focus on the correct IM session.

Related links

[Supervisor desktop](#) on page 146

Barging into an agent call

With the Barge In feature, a supervisor can directly enter an active call and engage in a conversation with the agent and the customer.

Procedure

1. Start a service observing session for the agent.
2. Click the **Barge In** icon to enter the active call.

The system displays the Service Observing work item interaction on the supervisor screen, with the **Barge In** and **Listen In** toggle buttons. When you click the **Barge In** option, you enter the agent-customer interactions area. When you change to the **Listen In** option, you listen to the agent-customer interaction. By default, the system enables the **Listen in** option.

The work item window of the agent expands to display the supervisor name and an **Observing** tag to indicate the supervisor intervention.

3. To end the barge in session, click the **Listen In** button.

The **Listen In** button changes to the **Barge in** button and the system restores service observing.

Related links

[Supervisor desktop](#) on page 146

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® 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.

Related links

[Supervisor desktop](#) on page 146

Logging out an agent from supervisor desktop

A supervisor can remotely log out an agent from the contact list of the supervisor. The supervisor can perform this task only when the agent state is either **Available** or **Auxiliary** and not **Busy**. The Contact List window of the supervisor displays the list of supervised agents with agent status in the first column of the Contact List window.

Before you begin

An agent must be in the **Available** or **Auxiliary** state and not in a call when you try to perform a remote log out. You cannot log out an agent when the agent state is **Busy**.

Procedure

1. Log in to Avaya one-X[®] Agent as a supervisor.
2. Click the **Contact List** icon.
The system displays the Contact List window.
3. Expand the **My Team** list of the Contact List window.
4. Click the **Agent Status** button next to the agent's last name.
5. Click **Log out** from the **Agent Status** list.

The system changes the agent status to logged out in the Contact List window.

Related links

[Supervisor desktop](#) on page 146

Viewing the agent work log and transcripts

About this task

You can view the work log of agents from the configured contact list under **My Team**. To observe an agent outside your contact list, you must first add the agent to your contact list under **My Team** and then view the work log.

Procedure

1. Log in to Avaya one-X® Agent as a supervisor.
2. Click the **Contact List** icon.
The system displays the Contact List window
3. Click the **Service Observe** button corresponding to the agent name in the Contact List window.
The system displays the **Service Observe** menu.
4. Click **View Work Log** on the **Service Observe** menu.
The system displays the Advanced Search window.
5. Type the search criteria in the **Search** field.
You can also use *(asterisk) as wild card and view all work logs of the selected agent.
6. Set the **From** and **To** date range to filter the search if required.
7. Click the **Search** button.
The system displays the work logs on the Advanced Search window.
8. To view the IM and TTY transcripts, expand the work item record, and click the **View Transcript** button for one work log.

Related links

[Supervisor desktop](#) on page 146

Chapter 20: Agent preferences and controls

Avaya one-X® Agent provides a centralized control to customize the audio and user interface. You can also manage the call and messaging features and record agent greetings. You can click the corresponding panel to view or change the settings.

Audio panel field overview

The Audio panel consists of Basic and Advanced tabs. The Basic tab provides settings to adjust audio volume for playback, recording, and incoming calls. With the Advanced tab, you can troubleshoot audio-related issues.

Audio Basic tab field descriptions

The Basic tab provides simple settings to adjust the audio volume for playback, recording, and incoming calls. You can also set the system to play a ring tone through the computer speaker and select a ring tone for an incoming call.

The Basic tab provides the following controls:

Name	Description
Playback	<p>Use the Playback slider to adjust the volume of the sound output through the computer speakers or headphones.</p> <p>Start the Mute option to eliminate all sound output through your speakers or headset.</p> <p> Note:</p> <p>Voice on Playback is only applicable for the My Computer configuration. The system applies these settings on your computer. But, the settings do not affect the headset</p>
Record	<p>Use the Record slider to adjust the recording volume of all sound transmitted through a microphone to your computer.</p> <p>Start the Mute option to eliminate any sound transmitted to the computer through the microphone.</p>

Table continues...

Name	Description
	<p> Note:</p> <p>These settings do not affect the headset volume if you have connected the headphone to the deskphone instead of your computer.</p>
Ringing	<p>Use the Ringing slider to adjust the volume of the sound played through your speakers or headset when you receive an incoming call.</p> <p>Start the Mute option to eliminate any sound that indicates an incoming call.</p>
Play ringing through the internal PC speakers	<p>Start the Play ringing through the internal PC speakers option to play the sound through the speakers of your computer and your headset simultaneously for an incoming call.</p> <p> Note:</p> <p>You cannot use this option if the computer does not have an internal speaker.</p>
Enable Sidetone	<p>Sidetone refers to listening to what you say in the microphone. You cannot edit the settings and therefore the control appears dimmed.</p>
Use custom ringtone	<p>Start Use Custom ringtone for the system to play a custom ring tone through your speakers or headset when you receive an incoming call.</p> <p> Note:</p> <p>When you start this option, the system displays the browse field. Use the browse field to find and set the Wave file. The application plays the wave file every time you receive a call.</p>

Related links

[Audio Advanced tab field descriptions](#) on page 153

[Setting up the audio options](#) on page 48

Audio Advanced tab field descriptions

The Advanced tab provides the following controls:

Name	Description
Playback Device	Use the Playback Device field to select the audio playback hardware available on your computer.
Record Device	Use the Record Device field to select the audio capture hardware available on your computer.

Table continues...

Name	Description
Transmit Gain	Use the Transmit Gain slider to set the gain for outgoing sound during a call. You can set the value from 0.1 to 10.0. Set the value to 0.35.
Receive Gain	Use the Receive Gain slider to set the gain for incoming sound during a call. You can set the value from 0.1 to 100.0. Set the value to 1.00.

Button	Description
Background Noise Test	<p>With the Background Noise Test button, you can determine the normal background noise levels. You can prevent Avaya one-X[®] Agent from transmitting the background noise when you are not speaking during a call.</p> <p>When you click Background Noise Test, the system displays the Background Noise Test dialog box. You click Test to determine the noise level.</p> <p> Note:</p> <p>Do not cover the microphone or talk during the test. You might rerun the test if you detect unusual noise levels during the test.</p>

Related links

[Audio Basic tab field descriptions](#) on page 152

[Setting up the audio options](#) on page 48

Instant Messaging field overview

The Instant Messaging field consists of General, Alerts, and Responses tabs.

General tab field descriptions

With the General tab, you can define the instant messaging greeting and option to set the automated Away IM status. You can also start the desktop sharing feature using this tab.

Name	Description
Greeting	Use this field to enter the IM greetings, for example, type <code>Hello</code> .
Minutes	Select a value from the Minutes drop-down list Avaya one-X [®] Agent to automatically display the

Table continues...

Name	Description
	status as Away when the system is in the idle status. By default, the value is 15 minutes.
Allow desktop sharing	Use this option to open to share the desktop.

Alerts tab field descriptions

You can define an alert for an incoming message from the Alert tab window.

Name	Description
Display main window	Use this option to display the main Avaya one-X [®] Agent window on the foreground for an incoming message.
Display IM window	Use this option to view the incoming message in the IM window.
Flash icon	Use this option for the system to flash the Avaya one-X [®] Agent icon on the task bar for an incoming message.

Responses tab field descriptions

With the Response tab, you can set the automated IM response.

Button	Description
+	Click the plus button (+) to add a new IM response to the list.
-	Click the delete button (-) to delete an IM response from the list.
Up	Click Up to move up the selected IM response in the pane.
Down	Click Down to move down the selected IM response in the pane.

TTY panel overview

With the TTY panel, you can perform the following tasks:

- Define the incoming TTY call appearance.
- Set an automated response for the incoming TTY message.
- Specify numbers for which the TTY message window must appear on the system.

- View the preset TTY abbreviations.
- Add new TTY abbreviations to the TTY list.

TTY General tab field descriptions

With the TTY General tab, you can define the call appearance of an incoming TTY. You can also use the TTY panel to set an automated response to the incoming TTY message.

Name	Description
Greeting	Use this field to define a welcome TTY message. By default, the Greetings field displays the Hello, GA message.
Show TTY window on every voice call	Use this option for the system to display the TTY window on every incoming voice call.
Show TTY window when a call comes from	Use this option for the system to display the TTY window for calls in the field. The system displays the TTY window only for calls in the list panel. Use the add (+) button to add the deskphone numbers.
Always show TTY button in Voice interaction	Use this option to view the TTY button in the voice interaction window.

Abbreviations tab field descriptions

The TTY Abbreviations tab provides an option to define the TTY greetings. You can also configure the settings of the TTY window for voice calls.

Name	Description
Meaning	This field displays a short explanation of the corresponding TTY abbreviation.
Literal Meaning	This field displays the expansion of the corresponding TTY abbreviation selected from the list.
Description	This field displays the description or information on the corresponding TTY abbreviation selected from the list.

Button	Description
+	Click the add (+) button to add a new abbreviation to the TTY abbreviation list.
-	Click the remove (-) button to remove the abbreviation from the TTY abbreviation list.

Call Handling panel field descriptions

With the Call Handling panel, you can activate or deactivate call settings. The Call Handling panel provides the following controls:

Name	Description
Consultative Transfer	To consult the caller before transferring the call. * Note: You cannot transfer a call when you start this option.
Consultative Conference	To consult with the second caller before you add the first caller to the conference. Otherwise, the system prompts you to put the call on hold before transferring or adding the call to a conference call. * Note: You cannot add a call to a conference when you activate this option.
Auto Hold	To put a live call on hold automatically before transferring or conferencing calls. Otherwise, you must manually put the call on hold before transferring or conferencing calls.
Incoming Calls	To use one or all the following options to set the incoming call notifications. <ul style="list-style-type: none"> • Bring main window to front: Enable Bring main window to front to bring the window to the foreground and activate the window for a ringing call. • Flash icon: Enable Flash icon to view the icon flashing in the task bar when the system identifies an alerting call.

Related links

- [Putting a call on hold automatically](#) on page 72
- [Putting a call on hold manually](#) on page 72
- [Making a consultative conference call](#) on page 75
- [Making a direct conference call](#) on page 74
- [Making a consultative transfer](#) on page 78
- [Making a direct transfer](#) on page 77
- [Configuring the incoming call appearance](#) on page 45

Record Greetings panel field descriptions

With the **Record Greetings** panel, you can record agent greetings. By default, the first greeting in the list is the default agent greeting. Using the **Record Greetings** panel, you can create agent greetings and save the greetings in the manual playback menu.

The **Record Greetings** panel provides the following controls:

Button	Description
Record	Click Record to record the greetings.
Play	Click Play to play the greetings playback for the Agent Greetings in the list.
Stop	Click Stop to stop the greetings playback for the Agent Greetings in the list.
+	Click the plus button (+) to create a new agent greeting in the Agent Greetings list.
-	Click the minus button (-) to remove the selected agent greeting from the Agent Greetings list.
Up	Click Up to move up the selected agent greeting in the Agent Greetings list.
Down	Click Down to move down the selected agent greeting in the Agent Greetings list.
Description	Describe the greeting type.

Related links

[Setting Greeting Triggers activation criteria](#) on page 131

[Activating a recorded greeting](#) on page 52

[Recording an agent greeting](#) on page 129

[Deleting a greeting](#) on page 132

[Changing a greeting](#) on page 132

User Interface panel field descriptions

The User Interface panel contains the following controls to manage the Avaya one-X® Agent GUI:

Name	Description
Always display the main window on top	Use this option to view the application in the foreground of desktop window in front of all other windows applications.
Display tooltips	Use this option to view tooltips when you point the mouse on the user interface objects.
Display letters on Dialpad	Use this option to view letters on the dial pad that correspond to the numbers on the number pad of a deskphone.
Display the shortcut icon in the notification area	Use this option to view the Avaya one-X® Agent icon in the notification area of the windows taskbar.
Save window positions	Use this option to save the previous position of the main and the secondary windows on the computer.

Table continues...

Name	Description
	<p> Note:</p> <p>When you start this option, the system does not save the positions of configuration dialog boxes, other errors, warnings, or status dialog box messages.</p>
Show Phone Display	Use this option to view the call related and non call related information at the bottom of the Work List window. The deskphone display panel shows information from sources, namely, VuStats, and call-prompting digits.
Show Buttons Toolbar	Use this option to view the favorite buttons at the top of the Work List window.
Start Minimized	Use this option to view the Avaya one-X® Agent user interface in the minimized mode.
Skip Welcome Screen	Use this option to skip the Welcome window during the login and go to the station login.
Select Favorite Buttons	Use this button with the Show Button toolbar. With the Select Favorite Buttons option, you select buttons that you use in the Show Button toolbar and the dialpad window.

Related links

[Enabling the deskphone display on the main window](#) on page 58

[Configuring the toolbar buttons on the main window](#) on page 58

Chapter 21: System administration and controls

The System Settings window provides an extensive and robust set of tools to administer the Avaya one-X® Agent application. These settings affect how the application works. When you open the System Settings dialog box, the system displays the Login panel with other panels.

! Important:

You will not have permission to change, add, delete, or configure some features as the administrators might have restricted these features.

Login panel overview

The Login panel consists of Telephony, Agent, and IM tabs.

With the Telephony tab, you can configure the deskphone settings with Avaya Aura® Communication Manager. With the Agent tab, you can configure the agent settings with the ACD server. With the IM tab, you can configure the login settings for Presence Services.

Telephony Login panel field descriptions

The Telephony Login panel provides the following controls:

Name	Description
Enable automatic connection to Communication Manager	Use this field to register the telephone extension using the previous successful registration with Communication Manager. If you do not select this option, the system prompts you to provide settings at each login.
Extension	Use this field to register the extension number with Avaya one-X® Agent.
Password	Use this field to register the numeric password with the specified extension number.

Table continues...

Name	Description
Save password during sign in	Use this option to save the password when you sign in with the extension number for subsequent log-ins.
CM Auto Answer Support Required	Use this option to provide the auto-answer support if your administrator has administered the agent extension on Communication Manager.
Warn for Another User Logged in at Extension	Use this option to view a warning message if a user has logged in with the same extension from another location.
Server Address	<p>Use this field to enter the IP address of the primary registration server.</p> <p>You must set up the connection for the system to register. for more information about Server Address, see Alternate Server List administration for backup registration addresses.</p> <p>A user can also specify a Fully Qualified Domain Name (FQDN) of Communication Manager in the Server Address field. Avaya one-X[®] Agent attempts to resolve the IP address of FQDN from the configured Domain Name System (DNS) during the log in.</p>
User Type	<p>Use this drop-down list to set one of the following user types:</p> <ul style="list-style-type: none"> • Agent: To log in as an agent. • Non-Agent: To log in as an extension. • Supervisor: To log in as a supervisor. <p> Important:</p> <p>The system removes the Basic user type (license) and renames the License field to agent as User Type in the Avaya one-X[®] Agent release.</p>
Place and receive calls using	<p>Use this option to set the deskphone line to register the telephone settings with Communication Manager. Depending on the location, telephone set, and access network, select one of the following settings:</p> <ul style="list-style-type: none"> • My Computer: To register agent computer as a deskphone with Communication Manager. • Desk Phone: The office deskphone to register with Communication Manager. • Other Phone: To register the user-defined telephone settings with Communication Manager. • My Computer: To register agent the computer as a deskphone with Communication Manager. • Desk Phone: To register the office deskphone with Communication Manager.

Table continues...

Name	Description
Telephone at	<p>This option appears only if you select Other Phone from Place and receive call using list. The phone can be an analog telephone, a mobile, an extension, or a remote switch.</p> <p> Note:</p> <p>The system displays the Telephone at field during a log in sequence. The system uses the number as a temporary sign in and does not store the phone number in the Phone Numbers panel in the System Settings.</p>

Related links

[Setting up the Other Phone configuration](#) on page 36

[Setting up the Desk Phone configuration](#) on page 37

[Setting up the My Computer configuration](#) on page 35

Agent Login panel field descriptions

The Agent Login panel contains the following controls:

Name	Description
Enable ACD Login	<p>Use this option to enable the ACD feature. When you enable this option, you must provide the user credentials to log in to the ACD services.</p> <p> Note:</p> <p>The system does not display the ACD tab if you log in as a non-agent or if your administrator has not configured the buttons for this extension.</p>
Automatically sign into the ACD server	Use this option for the system to log the user in to ACD after the user registers the extension with Communication Manager.
Agent	Use this field to enter the agent login ID
Password	Use this field to enter the agent login password.
Save agent password during sign in	Use this option to save the password with the agent extension number. When you use this option, you need not type the password at the next sign in.
Default Agent State on ACD connection	<p>Use this option to set the default agent state after the successful connection with the ACD service. You can set the default agent state to:</p> <ul style="list-style-type: none"> • Ready: Select this option for the immediate availability of agent after establishing the ACD connection. • Auxiliary: Select this option to set up the work space and adjust the program preferences after establishing the ACD connection.

Related links

[Configuring the agent settings](#) on page 38

IM login field descriptions

The IM panel contains the following settings:

Name	Description
Enable IM Login	Select this option to activate the Instant Messaging login features at the user desktop. Else, the user cannot log in to Presence Services.
Enable automatic connection to IM server	Select this option to connect to Presence Services every time you sign in after the registration of the user telephony extension.
User Name	Type the user name registered on the IM server.
Password	Type the IM password.
Domain	Type the domain name of the IM server.
Save password during sign in	Select this option to save the password for the subsequent login.
Server Address	Type the IP address of the IM server.

Alternate Server List panel field descriptions

The Alternate Server List panel contains the following controls:

Name	Description
Alternate Servers	<p>Use the Alternate Servers field to view the IP proxy address of the secondary server.</p> <p> Note:</p> <p>Do not enter the IP address of the primary server in this list.</p>
Button	Description
Add	Click Add to create an item in the Alternate Servers list.
Delete	Click Remove to delete the selected item from the Alternate Servers list.

The Phone Numbers panel field descriptions

You can set the deskphone numbers only in User Profile. To prevent other agents from adding deskphone numbers in the client application, you must select the read-only option. You can add deskphone numbers by editing the user profile on the Manage Users screen.

The Phone Number panel contains the following controls:

Name	Description
Phone Numbers	This field displays the deskphone configuration with the deskphone numbers.  Note: You can rename the deskphone number by clicking the corresponding items.
Phone Number	Use this field to specify the deskphone number for the corresponding deskphone configuration.

Button	Description
Add	Click Add to create a new item in the Phone Number list.
Remove	Click Remove to delete the item from the Phone Number list.

Related links

[Adding a new telephone number](#) on page 142

[Modifying the name and phone number](#) on page 143

[Deleting a deskphone number](#) on page 143

Work Handling panel field descriptions

The Work Handling panel contains the following controls:

Name	Description
BASIC CONTROLS	
Work Completion for ACD calls	Use the following options to configure the Work Completion settings for ACD calls: <ul style="list-style-type: none"> • Auto-Complete: Select this option to change the work states to Ready immediately after you complete the ACD call. You can override this option if the set the Auto-complete option on a call by call basis and perform Follow Up Work. The system restores the Auto Complete option for the subsequent calls. • Allow Follow-Up: Select this option to perform Follow Up Work on ACD calls. You can override this option to have the

Table continues...

Name	Description
	<p>work completed automatically when the ACD call ends. On the next and subsequent calls, the system applies the Follow Up option.</p> <ul style="list-style-type: none"> - Timed Follow-Up: The system presents this option if you set the Allow Follow-Up option to work completion for ACD calls. You can specify the time in seconds to follow-up tasks in the Time Period field. - Allow extending Follow-Up: Use this option to extend the timed follow-up period if you defined the option above.
Transitions to Ready State	<p>Use the following options to configure the transition state:</p> <ul style="list-style-type: none"> • Auto-Ready: Select this option to change the agent status to Ready after completing the work item. • Manual-Ready: Select this option to change the agent state to the AUX status after completing the work item. - With Aux Code: The AUX state works with AUX code. If you or your system administrator has defined a reason code for AUX, the system displays this option in the drop-down list.
ADVANCED CONTROLS	
Work items	<p>Use the following options to configure the Work Item settings:</p> <ul style="list-style-type: none"> • Auto-Accept: Use this option for the system to answer the call automatically. <p>This feature does not relate to CM Auto Answer Support Required on the Login window. However, either use the Communication Manager Auto Answer feature with Avaya one-X[®] Agent support, or this Auto Accept feature. You must not use the features together.</p> <ul style="list-style-type: none"> • Manual-Accept: Use this option to answer each call manually, or if you have administered Auto Answer in Communication Manager.
Communication Manager Ready Mode	<p>Use the following options to configure the Communication Manager Ready Mode settings:</p> <ul style="list-style-type: none"> • Auto In: Use this option only to override the Avaya one-X[®] Agent program handling. Use this option to use the Communication Manager timed after the call work feature and other Communication Manager Auto-in features is incompatible with Avaya one-X Agent behavior. <p>This feature does not relate to CM Auto Answer Support Required that appear on the Login window. However, the functionality is the same.</p>

Table continues...

Name	Description
	<ul style="list-style-type: none"> • Manual In: The Manual In option is available as default. You must ensure that the Manual In option is in the assigned state for the Avaya one-X® Agent program to perform the work. <p>Do not confuse with Communication Manager use of the same names. The Auto Ready and Manual Ready on the front tab controls the CM In behaviors in Avaya one-X® Agent.</p>

Related links

[Answering a call automatically](#) on page 62

[Answering a call manually](#) on page 61

Answering a call manually is similar to lifting the deskphone receiver when the telephone rings. In Avaya one-X® Agent, you must press the answer button on the program or physically go-off hook, depending on your deskphone settings, when the system receives an incoming call.

[Changing the agent work status](#) on page 95

[Viewing the Work Item details](#) on page 97

[Completing the follow-up work](#) on page 98

[Configuring the Work Handling options](#) on page 44

Greetings Triggers panel field descriptions

The Greetings Triggers panel contains the following controls:

Name	Description
Greetings Triggers	<p>Use the Greetings Triggers list to select the appropriate greetings playback.</p> <p> Note:</p> <p>Before assigning the greeting, ensure that there is at least one greeting in the Greeting Triggers list. For more information about recording greeting, see Recording an agent greeting on page 129.</p>
Auto Play	<p>Use the Auto Play drop-down list to choose an appropriate greeting trigger for an incoming call. You can set the system to trigger the greetings automatically in any of the following scenarios:</p> <ul style="list-style-type: none"> • Select the Do not autoplay option to disable the greeting option automatically. You must manually play the greeting from the greetings menu on the main window.

Table continues...

Name	Description
	<ul style="list-style-type: none"> Select the When agent is in ready mode option to play the greeting for incoming calls when you set the agent status to Ready. Select the When agent is logged in option to play the greeting for incoming calls when you log in as an agent. Select the For all incoming call option for the system to play the greeting for all incoming calls including direct calls.
Match ANI Digits	<p>Select the Match ANI Digits option to play the agent greeting if the ANI digit specified in the field to the right of this option matches the deskphone number of an incoming call.</p> <p>Use the Match Criteria field with the Match ANI Digits option to specify the location in the ANI digits from where you can find the digits.</p> <p>For example, if you set the Match Criteria field to the From Right option, the digits specified in the Match ANI Digits field must match the last digits in the ANI number to play an agent greeting.</p>
Match VDN Digits	<p>Select the Match VDN Digits option to play the agent greeting if the VDN digit specified in the field to the right of this option matches the deskphone number of an incoming call.</p> <p>Use the Match Criteria field with Match VDN Digits option to specify the location in the VDN digits from where you find the digits.</p> <p>For example, if you select the set the Match Criteria field to the From Left option, the digits specified in the Match VDN Digits field must match the first digits in the VDN number to play an agent greeting.</p>
Match Prompted Digits	<p>Select the Match Prompted Digits option for the system to play the agent greeting if the prompted digit specified in the field to the right of this option during vector processing match digits in the field.</p> <p>Use the Match Criteria field with Match Prompted Digits option to specify the location in the Prompted Digits from where you find the digits.</p> <p>For example, if you select the set the Match Criteria field to Anywhere option, the digits specified in the Match Prompted Digits field must match anywhere in the prompted digits to play an agent greeting.</p>

Related links

[Activating a recorded greeting](#) on page 52

VuStats panel field descriptions

The VuStats panel provides the following controls:

Name	Description
VuStats	Use the VuStats list field to view the VuStats information on the VuStats Monitor window.
Refresh Rate	Use the Refresh Rate field to define the refresh interval for the system to display the VuStats information. When you set the refresh interval, the system changes the focus from the last line of display in the list to the first line.
Display interval	Use the Display Interval field to define the interval to display each VuStats. When you set the refresh interval, the VuStats Monitor changes the focus from one VuStats line of display to the next one in the list.

Screen Pop panel field descriptions

The Screen Pop panel contains the following controls:

Name	Description
Screen Pop	The Screen Pop list displays a list of Screen Pops that you can use to open a program or a Web service.
Address or URL of program	<p>Use this field to enter the URL of the Web program containing reference to a Web program and the call-related data in a Web program format.</p> <p>For example, to view the customer database program, in the Address or URL of Programs field, type <code>http://internal.widgets.com/db/customers.exe</code>.</p> <p> Note:</p> <p>You can also specify the parameters from the Parameter column within the string.</p>
Command Line Parameters	<p>Use the following field to get information from a caller:</p> <ul style="list-style-type: none"> Type <code>%n</code> to pass the name of the other party on the call, if available. Type <code>%m</code> to pass the phone number of the other party on the call, if available. Type <code>%p</code> to pass the digits (prompted digits) the caller selected while processing through a vector, if available. Type <code>%v</code> to pass the VDN name through which the call connects.

Table continues...

Name	Description
	<ul style="list-style-type: none"> • Type %w to pass the VDN number of SIP through which the call connects. • Type %u to pass User-to-User-Information that Communication Manager collected from a centralized application. Avaya one-X® Agent supports a maximum 32 bytes of UUI information because CM can only send maximum 32 bytes for UUI information. • Type %s to pass the time when Avaya one-X® Agent accepts the call. • Type %e to pass the time when Avaya one-X® Agent ends the call. • Type %d to passes the current date when Avaya one-X® Agent receives the call. <p>You can test the settings by clicking the Test button.</p>
Trigger when an inbound call is	<p>Use this option to indicate when the program must trigger the Screen Pop:</p> <ul style="list-style-type: none"> • Ringing: Select this option to open Screen Pop when the phone rings. • Missed: Select this option to open Screen Pop when the call appearance from an incoming call disappears after no response when the caller hangs up. • Answered: Select this option: <ul style="list-style-type: none"> - To open the Screen Pop when an agent answers the phone using the Avaya one-X® Agent GUI. - By picking up the phone handset. • Released: Select this option: <ul style="list-style-type: none"> - To open the Screen Pop when you click the release button on the Avaya one-X® Agent GUI. - Hang up the phone.
Trigger when an outbound call is	<p>Use this option to indicate when the program must trigger Screen Pop:</p> <ul style="list-style-type: none"> • Connected: Select this option to open Screen Pop when the called-party answers the phone. • Released: Select this option: <ul style="list-style-type: none"> - To open the screen pop when you click the release button on the Avaya one-X® Agent GUI. - Hang up the phone.

Table continues...

Name	Description
Trigger only when the VDN is	<p>Select this option to open Screen Pop when an incoming call displays on a specific VDN.</p> <p> Note:</p> <p>For Screen Pop to run, you must enter the VDN name (up to 15 characters) in the field.</p>

Button	Description
Add	Click this button to create an untitled Screen Pop item in the Screen Pop list.
Remove	Click this button to delete the selected Screen Pop in the Screen Pop list.
Test	Click this button to verify the corresponding Screen Pop configuration.

Related links

[Creating a screen pop](#) on page 134
[Starting a screen pop](#) on page 136
[Changing a screen pop](#) on page 136
[Deleting a screen pop](#) on page 136

Launch Applications panel field descriptions

With the Launch Applications panel, you can administer the properties of a launch item. The Launch Application panel contains the following controls:

Name	Description
Launch Applications	<p>Use the Launch Applications list to view all the launch items.</p> <p> Note:</p> <p>You can rename the launch item by clicking the corresponding launch items.</p>
File, Folder or URL to launch	<p>Use the File, Folder or URL to launch field to type a file name or a folder name. Also, you can use Browse to navigate to either a filename or a folder.</p> <p>If you select or enter a folder name instead of a file name, the remaining fields on the Application Launch menu remains inactive, as you cannot apply these properties to browse to the folder launch items.</p>

Table continues...

Name	Description
	<p> Note:</p> <p>File, Folder, or URL to Launch, Parameters to Pass, and Default Directory to support the use of environment variables.</p>
Description	Use the Description field to provide a short description of the launch application. The description text provides the user with a hint about the purpose of the launch item button.
Parameters to pass	Use the Parameters to Pass field to specify more values at the command prompt to a particular third-party application.
Default Directory	<p>Use the Default Directory field to assign a default directory when implementing a launch item or select the directory.</p> <p> Note:</p> <p>This launch item property is important for any third-party application that internally requires relative paths to the own execution location to reference the dependent components.</p>

Button	Description
Add	Click this button to create a new item in the Launch Applications list and in the Launch Application menu.
Remove	Click this button to delete the launch item from the Launch Application list and from the Launch Application menu.
Up	Click this button to move the selected launch item its current position in the Launch Application field and the Launch Application menu.
Down	Click this button to move the selected launch item the current position in the Launch Application field and the Launch Application menu.
Test	Click this button to verify the launch item. The system forwards information such as the file name or the browse folder, parameters, and default file name to ShellExecute Windows API for the application to start correctly.

Related links

[Removing a launch item](#) on page 121

[Rearranging launch items](#) on page 121

[Adding a launch item](#) on page 120

Directory panel field descriptions

With the Directory panel, you can define and configure an LDAP directory search. If you are unsure of the settings for the public directory server, contact your system administrator. You can configure

the public directory server to communicate with public directory users using Avaya one-X® Agent. You can add public directory records that you retrieved from a search to the contact list.

The Directory panel contains the following controls:

Name	Description
Directory	Use the Directory list box to view the list of folder names that are available for configuration. You can rename the directory name to identify the public directory server.
Server Address	Use the Server Address field to enter the network domain or the IP address of the public directory server.
User Name	Use the User Name field if the public directory server requires authorization. The use of this field is optional.
Password	Use the Password field to enter the password for the user name specified in the User Name field.
Search Root	Use the Search Root field to enter an LDAP format string representing an information type. For example, ou=people, o=mycompany.com specifies the information under the organization unit of “people” within the organization of “mycompany.com”. For more information about Base DN or Search Root strings, see the documentation of the LDAP system and company database configuration.
Port	Use the Port field to enter the port number of the server.
Timeout	Use the Timeout field to specify the time out interval in seconds for the search to expire. For example, type 200.
Max Entries	Use the Max Entries field to enter the maximum number of attempts before the system returns the search to return. For example, type 200.
Bind Option	Use the Bind Options drop-down field to choose the LDAP service type. You can choose any one of the following options: <ul style="list-style-type: none"> • Simple Bind: Use the Simple Bind option to bind an LDAPv2 server to the directory service. • Active Directory GSS Bind: Use the Active Directory GSS Bind option to interface the directory service with an LDAPv3 server.

Button	Description
Add	Click this button to create an untitled directory in the Directory Name list.
Remove	Click this button to delete the selected directory from the Directory Name list.

Related links

[Deleting a Public Directory service](#) on page 140

[Defining a Public Directory service](#) on page 138

Work Log panel field descriptions

The Work Log panel contains the following controls:

Name	Description
Log Incoming Calls	Select this option to record all incoming calls in the Work Log window.
Log Outgoing Calls	Select this option to record all outgoing calls in the Work Log window.
Log Incoming IMs	Select this option to record all incoming IM interactions in the Work Log window. To save transcripts of incoming IM interactions, click Save Transcripts .
Log Outgoing IMs	Select this option to record all outgoing IM interactions in the Work Log window. To save transcripts of outgoing IM interactions, click Save Transcripts .
Log Incoming TTYs	Select this option to record all incoming TTY interactions in the Work Log window. To save transcripts of incoming TTY interactions, click Save Transcripts .
Log outgoing TTYs	Select this option to record all outgoing TTY interactions in the Work Log window. To save transcripts of outgoing TTY interactions, click Save Transcripts .
Log State Change	<p>Select this option to record the change in the agent state in the Work Log window. You can view the following State Change:</p> <ul style="list-style-type: none"> • Auxiliary (Aux states) • After Call Work • Ready • Agent Login • Agent Logout <p>The Work Log window logs the labels of the state. For example, if you define Reason Code 9 for Lunch, the system records Aux with RC9 as Auxiliary Lunch.</p> <p> Note:</p> <p>You can only view the agent state logged within Avaya one-X[®] Agent. Avaya one-X[®] Agent does not support Agent State on Communication Manager.</p>

Table continues...

Name	Description
Days to keep contact records in history	Specify the number of days that the system must keep the records in the Work Log window. To clear history at the end of session, type 0.
Number of contacts per screen	Specify the number of logs that the system must display in the Work Log window at a time.
Clear History	Click this button to clear all records from the Work Log window.

Related links

[Adding a contact from the Work Log window](#) on page 109

[Removing the work log records](#) on page 117

[Viewing log details](#) on page 116

[Viewing the Work Log window](#) on page 115

[Searching a work log using the Advanced Search window](#) on page 118

[Finding a work log record](#) on page 118

Desktop Integration panel field descriptions

You can integrate desktop plug-ins in the Avaya one-X® Agent application. The Desktop Integration panel provides the following controls:

 Note:

The system provides the option to install the Click-to-Dial program at the time of installation. You must restart the web application to start the Desktop Integration feature.

Name	Description
Enable dialing numbers from Internet Explorer	Select this option to dial a deskphone number that the system displays on the Microsoft Internet Explorer page.
Enable dialing numbers from Mozilla Firefox	Select this option to dial a deskphone number that the system displays on the Mozilla Firefox page.
Enabling dialing numbers from Google Chrome	Select this option to dial a deskphone number that the system displays on the Google Chrome page.

Related links

[Using the Click-to-Dial feature](#) on page 101

Voice Mail Integration panel field descriptions

You can integrate the voice message system with a deskphone, an application, or a web browser. You can start the Message Waiting indicator on the registered extension and can receive the voice message from the voice mail system.

! Important:

You can integrate any voice mail service applications at any specified time.

* Note:

Before you integrate the voice mail service for your extension, check if your system administrator registered your extension with the voice mail system.

The Voice Mail Integration panel contains the following controls:

Name	Description
Enable Message Access	Use Enable Message Access to start one of the options in When Voice Message Indicator is clicked when you click Voice Mail on the main window.
When Voice Message Indicator is clicked	<p>The When Voice Message Indicator is clicked option determines the action the system must perform when you click the Voice Message icon on the top bar of Avaya one-X[®] Agent.</p> <ul style="list-style-type: none"> • Dial this number: Use this option to dial a deskphone number or an extension in the field. You must provide a deskphone number or an extension in the field. • Start this application: Use this option to run a program specified in the field when you click the Voice Mail icon. You must provide the path and the file name of an executable program in the field. • Open web page: Use this option to open a Uniform Resource Locator (URL) address when you click the Voice Mail icon. You must provide a valid URL in the field.

Related links

[Accessing your voice mails](#) on page 99

[Integrating the voice mail system](#) on page 51

[Integrating the voice mail system](#) on page 51

Reason Codes panel field descriptions

The Reason Codes panel contains the following controls:

Name	Description
AUX Reason Codes	Use this list box to define auxiliary reason codes locally in the file name. You can also associate AUX reason codes with numeric reason codes in Communication Manager. The auxiliary reason codes specify the reason for changing the state to the AUX mode.
Log Out Reason Codes	Use this list box to create logout reason codes and to associate logout reason codes with numeric reason codes that Communication Manager supports. The Logout reason codes describe the reason for logging out from the ACD service.
Work Reason Codes	Use this list box to define work codes locally in the file name. You can create work codes and assign the work code at the time of completing the work item.

Related links

[Assigning a work code](#) on page 97

[Defining reason codes for auxiliary](#) on page 56

[Defining log out reason codes](#) on page 54

[Defining reason codes for a work item](#) on page 53

Event Logging panel field descriptions

The Event Logging panel contains the following controls:

Name	Description
Logging level	<p>Avaya one-X[®] Agent provides the following four levels of logging support:</p> <ul style="list-style-type: none"> • DEBUG: The DEBUG level logging records informational messages, error messages, warning messages, and debug messages. <p> Note:</p> <p>Do not choose the DEBUG level for everyday production systems. The volume of file traffic the system generates and interactions that such file open and close and write activity might have on any Anti Virus software to check each file access to these logs.</p> <p>To trouble shoot specific problems, you can set DEBUG on a particular computer.</p> <ul style="list-style-type: none"> • INFO: The INFO level logging records informational messages, error messages, and warning messages. • WARNING: The WARNING level logging includes errors and warnings.

Table continues...

Name	Description
	<ul style="list-style-type: none"> • ERROR: The ERROR level records only errors.
Appender	<ul style="list-style-type: none"> • LocalLogging_AvayaFormat: This format complies with the Avaya logging specifications. This format is logging parser friendly, but less user friendly. This format also forwards logs to the local log files directory. • LocalLogging_GeneralFormat: This format produces easy-to-read logs that are more user friendly. In this format, logs are forwarded to the local Log Files directory. • CentralLogging: This format forwards logs to the central server. The administrator must provide the central logging server name or IP Address. This format is parser friendly.
Remote Host for Central Logging	You must specify the remote host IP address for central logging.

Button	Description
View Log	Click this button to view the log files for the corresponding log.

Outlook Contacts panel field descriptions

The Outlook Contacts panel contains the following controls:

Name	Description
Exchange Server Address	To type the exchange server address.
User Name	To type the login name to gain access to the exchange server address if the exchange server requires authorization.
Password	Use this field to type the password.
Domain	Use this field to type the domain name of Exchange Server.
Timeout	Use this field to specify the time out interval in seconds for the search to expire. For example, type 200.

Related links

[Importing contacts from Microsoft Outlook](#) on page 111

[Importing Outlook Contacts](#) on page 139

Dialing Rules field descriptions

The Dialing Rules panel contains the following controls:

Name	Description
DIALING RULES	
Number to dial to access an outside line	Use this field to specify the number to dial an outside line. For example, if you are in North America, you must type as 9 to dial an outside line.
Your country code	Use this field to specify the country code of your Communication Manager. For example, type 1 for North America, 44 for Great Britain, and 61 for Australia.
Local calling area codes	Use this field to specify the area codes in the local calling area of the location of Communication Manager. If you have more than one area code, type the area codes and use commas without spaces to separate the codes. For example, type 720, 721.
Number to dial for long distance calls	Use this field to specify the access code that the system requires for making long distance calls. For example, for North America, type 1.
Number to dial for international calls	Use this field to specify the code that the public switched network requires where Communication Manager dials an international call. For example, in North America, type 011.
Extension length for internal extension calls	<p>Use this field to specify the length of the number for internal extension calls. For example, if an internal extension consists of five digits, type 5.</p> <p>When you assign the length of the internal extension number, Avaya one-X[®] Agent treats the dialed number consisting of the specified number of digits as an internal extension.</p> <p> Note:</p> <p>Communication Manager might can have multiple length extension numbers. For example, if your company supports three-digit, five-digit, and seven-digit internal extensions, type 3, 5, 7. You must use a comma to separate the values.</p>
Length of national phone numbers (including area/city code)	<p>Use this field to specify the length of a national long distance telephone number for the location of Communication Manager. This field includes any area code and city code. For example, type 10 for North America.</p> <p> Note:</p> <p>Some countries support variable national phone numbers. You can type a valid deskphone number and use a comma to separate the numbers. For example, type 10, 11, 12 as variable national phone numbers for countries that support codes with multiple lengths.</p>
Include area/city code when making a local call	Select this option to include the area code in local calls. You can select this option only when you have a single area code in the Local Calling Area field.

Table continues...

Name	Description
Add long distance prefix on local calls	<p>Select this option to add the code as defined in the Number to dial for long distance calls field before adding the local calling area.</p> <p> Note:</p> <p>You can select this option when you have a single local area calling code. When you select the option to include the local area calling code or when you have multiple area codes in the Local Calling Area field. Do not select the option to include local area code because the code is available in the Dial string.</p>
Display confirmation window before dialing a number	This field specifies whether the system must show a confirmation window with the number to send to Communication Manager before the system tries to make a call.
Time period of Pause (Comma) in dialing (in seconds)	<p>Use this option to specify the period for each comma character in the dialing field before dialing the next digit. The default value for this field is 2 seconds.</p> <p> Note:</p> <p>When you dial a call, the system disables the call controls of Avaya one-X[®] Agent until the agent dials the number completely, including any pause or authorization code.</p>
AUTHORIZATION CODE	
Enable Authorization code	Use this option to start automatic dialing of authorization codes.
Authorization Code	Use this field to specify an authorization code number.
Send authorization code	<p>Use this option to define the call types that the program must add to make external calls.</p> <ul style="list-style-type: none"> • Select On local calls to make local calls using the authorization code. • Select On national long distance calls to make national long distance calls using authorization code. • Select On international long distance calls to make international calls using authorization code.

Related links

[Setting up the dialing rules](#) on page 41

Touch Tone Shortcuts panel field descriptions

The Touch Tone Shortcuts panel contains the following controls:

Name	Description
Touch Tone Shortcuts	This field displays all deskphone numbers mapped to the Touch Tone Shortcuts option in the dial pad window. To rename the deskphone names, click the corresponding names.
Phone Number	Use this field to specify the deskphone number to be mapped to the touchtone shortcuts panel. The numbers for a Touch Tone shortcut can be of any length and can include * and #. The numbers do not have to conform to any format.

Button	Description
Add	Click this button to create an Untitled shortcut in the Touch Tone Shortcuts panel.
Remove	Click this button to delete the selected item from the Touch Tone Shortcuts panel.

Related links

[Creating the touchtone shortcuts](#) on page 126

Profiles panel field descriptions

The Profiles panel provides the following controls:

Name	Description
Profiles	The profiles list displays the user-defined profiles with the default profile.  Note: You cannot rename the profile. You must first copy the profile to the name and then delete the copy you do not require.
Automatically execute all logins for the selected profile	Select this option to run all login sequences for the selected or current profile without presenting a profile selection dialog box. The sequence depends on how you have set the login option for other parameters in the login panel. If you do not select this option and have multiple profiles, the application provides you with options to select the profile from the list. You must select the appropriate profile when you start Avaya one-X [®] Agent on the computer.

Button	Description
+	Click this button to add an untitled profile in the Profile list.

Table continues...

Button	Description
	 Note: The new profile is based on the existing profile that is highlighted in the Profiles list.
-	Click this button to remove the selected profile from the Profiles list.

Related links

[Defining an agent profile](#) on page 50

Audio Monitor dialog box field descriptions

With the Audio Monitor dialog box you can verify the statistics of microphone, speaker, and VoIP traffic information. Also, you can reduce the noise level when you are not speaking during an active call.

Note:

The VoIP statistics are available only during an active call.

The Audio Monitor dialog box contains the following controls:

Name	Description
Microphone	The green sound progress bar determines the audio quality of the computer.
Speaker	The green sound progress bar determines the speaker quality connected to the computer.
Codec	This field displays a device that converts binary signals transmitted on digital networks to analog signals converted on the analog networks.
Destination	The progress bar displays the destination of the call. In this release, the destination is always set as <i>Not Available</i> .
Traffic	This field shows the network congestion in the network. In this release, this is always set as <i>Not Available</i> .
Discarded	This field shows the packets that the system receives, but discards. In this release, the field always displays 0.
Dropped	This field shows packets that the system does not receive. In this release, this field always displays 0.
Jitter Buffer	<p>The green status bar displays in milliseconds (ms) the delay in packets reaching the destination.</p> <p>The jitter buffer temporarily stores the incoming data packets to minimize delay variations and sends the voice packets to the</p>

Table continues...

Name	Description
	voice processor in evenly spaced intervals. Variations in packet arrival time could be due to the congestion in network, change in timing, or change in routing.
Ping delay	The green status bar displays the delay between two pings before giving a time-out to a batch file.
Perceived delay	This field shows the network delay in receiving packets in milliseconds.
Quality	This field shows the percentage of packet loss.
Silence Suppression Enabled	<p>This option enables the system to transmit audio when you are not speaking. The system reduces the total number of packets sent through the VoIP connection.</p> <p> Note:</p> <p>You cannot enable this option when you register Avaya one-X Agent in the My Computer mode.</p>

Related links

[Monitoring the audio quality and VoIP traffic](#) on page 99

Call Confirmation dialog box field descriptions

The system displays the call confirmation window if you activate the **Enable the Display confirmation window before dialing a number** option in the Dialing Rules panel.

The Call Confirmation dialog box provides the following controls:

Name	Description
Phone Number	The Phone Number field displays the number that you dialed from the Text Input field.
Will be dialed as	The Will be dialed as field displays the exact numbers including the dialing rules, if defined, before sending a call to the dialed number. You can change the number before sending a call.
Do not show this message again	Enable the Do not show this message again option if you do not want to view the message again when you dial a number in the next time. You can enable this option in the Dialing Rule panel.

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