# AVAYA

# Using the Avaya IP Office Contact Center Web Interface

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# Contents

Contents

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# Chapter 1: Introduction

## Purpose

This document provides contextual information and procedures for using Agent and Supervisor functionality in the IP Office Contact Center Web User Interface.

Administration functionality is not available on this interface. You can perform administration tasks using the IP Office Contact Center User Interface for Windows or the IP Office Contact Center web administration portal.

## Change history

| Issue | Date | Summary of changes |
|-------|------|--------------------|
| Release 10.1, Issue 1 | May 2017 | • Listed Windows 10 as a supported operating system.<br>• Rephrased a few notes and descriptions in the "Navigation" chapter.<br>• Added a note about the Emergency and Silent Monitoring options in Monitoring an agent call silently on page 57.<br>• Added a note about file name restrictions in Creating, replying to, and forwarding emails on page 45.<br>• Added information about chat transfer and consultation.<br>• Added information about the Previous Report View option. |

*Table continues…*

| Issue | Date | Summary of changes |
|---|---|---|
| Release 10.1.1, Issue 2 | October 2017 | • Changed the title of this document.<br><br>• Removed IP Office Contact Center User Interface for Chrome Devices references. Other names for this interface include "Chrome App" and "Chrome UI". All of these references have been removed.<br><br>• Removed the section about managing calls with a Plantronics headset because this section does not apply to the IP Office Contact Center Web User Interface.<br><br>• Updated IP Office Contact Center Web User Interface requirements on page 12 with information about Chromebook support.<br><br>• Updated the browser certificate configuration procedures under Web browser certificate configuration on page 13.<br><br>• Added Changing your password on page 20.<br><br>• Added Updating notification settings on page 21.<br><br>• Updated "Before you begin" in Requesting supervisor support during a call on page 41 to indicate that the call should not be on hold when an agent requests emergency assistance.<br><br>• Added Setting the appropriate language for spell checks on page 51.<br><br>• Updated "About this task" in Ending a chat on page 51.<br><br>• Split up the supervisor information about monitoring calls silently and joining calls when an agent requests emergency assistance. For more information, see Monitoring an agent call silently on page 57 and Joining a call when an agent requests emergency assistance on page 57.<br><br>• Added more detail to the steps in Joining a call when an agent requests emergency assistance on page 57.<br><br>• Reorganized reporting information and added Managing and exporting reports on page 61.<br><br>• Added a new chapter: Agent status and contact detail reports on page 63. |

*Table continues…*

| Issue | Date | Summary of changes |
|-------|------|--------------------|
| Release 10.1.2, Issue 3 | April 2018 | • Updated the descriptions in Home screen statistics for agents and supervisors on page 23.<br><br>• Updated the descriptions in Telephony screen functionality on page 25.<br><br>• Updated the descriptions in Email and chat functionality on page 27.<br><br>• Updated the information about tabs in the Realtime Information module in Supervisor Realtime Information and Reporting functionality on page 28.<br><br>• Updated Break policies and restrictions on page 34 to indicate that an administrator can choose to allow breaks during sign off prevention.<br><br>• Updated Working with customer details on page 35 to indicate that configured call tags are displayed.<br><br>• Updated Making a call on page 39.<br><br>• Updated the procedure in Viewing agent and group information in real time on page 54.<br><br>• Added Viewing variables on page 58.<br><br>• Updated the sections under Agent status and contact detail reports on page 63.<br><br>• Updated Documentation on page 69. |
| Release 10.1.2, Issue 4 | March 2019 | Corrected the table in IP Office Contact Center Web User Interface requirements on page 12. |

# Chapter 2: Getting started

With the IP Office Contact Center Web User Interface, you can access and use IP Office Contact Center Agent and Supervisor functionality. You can define users and change user privileges with IP Office Contact Center User Interface for Windows.

The following table summarizes Agent and Supervisor functionality. Depending on your privileges, some functionality might be unavailable.

| Agent functionality | Supervisor functionality |
|---|---|
| • Access a Home screen to view statistics and sign in to your agent groups. As an agent, you cannot send messages from the Home screen.<br><br>Telephony statistics include the service factor, the number of abandoned calls, and the number of calls in the queue.<br><br>• View supervisor messages and other agent statistics. Agent statistics display the number of logged in agents and the work state of each agent. You can also view the number of logged in supervisors.<br><br>• From the Telephony screen, make, receive, and manage calls. You can make an outbound call while you are not on a call or in the After Call Work (ACW) state.<br><br>  ✱ **Note:**<br><br>    Video calls are not currently supported.<br><br>• During a call, you can write notes, view customer history, and access configured websites. You can also request supervisor assistance.<br><br>• Use email and chat functionality if configured by your system administrator. If email and chat functionality are not configured, the Email and Chat tabs are not available in the UI.<br><br>• Start and end breaks. | • Access a Home screen that provides similar functionality as the Home screen for agents. As a supervisor, you can also send messages to agents from the Home screen.<br><br>• Access a Realtime Information screen to monitor groups, agents, and queues. You can expand these items to view details. For example, if you expand an agent group, you can see the current customer service statistics and the status of all agents in the group. You can also change the value of different variables.<br><br>• View and generate historical reports from the Reporting screen. An administrator must configure the types of reports that you can generate from the UI. You can change report parameters, such as date ranges, before generating a new report.<br><br>• Act as an agent to perform customer service tasks, such as answering an incoming call.<br><br>• Monitor an active call silently or join the call. To join a call, you must accept the emergency assistance request from the agent. If the agent did not make an emergency assistance request, you can only monitor the call silently.<br><br>• Force an agent to:<br><br>  - Sign in to or out of specific groups.<br><br>  - Take a break. |

# IP Office Contact Center Web User Interface requirements

The IP Office Contact Center Web User Interface has the following minimum requirements:

- Screen resolution: 1280 x 850 pixels on most devices, except for Chromebooks, which require 1366 x 768 pixels or higher.
- Memory: 4 GB.

The IP Office Contact Center Web User Interface does not support adaptive sizing. The layout depends on the size of your browser window.

The IP Office Contact Center Web User Interface is supported on various web browsers. Each browser supports different phones and operating systems. The following table lists supported browsers and shows what the IP Office Contact Center Web User Interface supports with each browser. For more information about interoperability, see https://secureservices.avaya.com/compatibility-matrix/menus/product.xhtml?name=IP+Office+Contact+Center.

> ❗ **Important:**
>
> Avaya recommends using the latest browser versions. Make sure your browser is updated to the latest available patch.

| Web browser | Supported operating systems | WebRTC support | Desk phone support | Avaya Communicator for Windows soft phone support |
|---|---|---|---|---|
| Internet Explorer (IE) [1] | • Windows 7<br>• Windows 8.1<br>• Windows 10 | No | Yes | Yes |
| Google Chrome | • Windows 7<br>• Windows 8.1<br>• Windows 10<br>• Mac OS X 10.10<br>• Chromebooks with Chrome OS version 37 or later | Yes | Yes | Yes |
| Mozilla Firefox | • Windows 7<br>• Windows 8.1<br>• Windows 10<br>• Mac OS X 10.10 | No | Yes | Yes |
| Safari | • Mac OS X 10.10 | No | Yes | No |

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[1] If you are using IE 11 through an intranet connection, ensure the **Display intranet sites in Compatibility View** check box in the Compatibility View Settings dialog box is *not* selected.

# Web browser certificate configuration

The following procedures describe how to enable your browser to accept IP Office Contact Center certificates. The instructions for Google Chrome vary for the Chrome Device, Windows, and macOS. The instructions for Internet Explorer and Firefox are the same for Windows and macOS.

**❗ Important:**

- You do not need to perform this task if your administrator has installed a genuine certificate from a trusted certificate authority (CA).

- All users on the same computer must configure their browser to accept IP Office Contact Center certificates.

## Configuring Google Chrome to accept certificates on a Chrome device

### About this task

Use this procedure if you are using a Chromebook. Before you install the required certificate, your browser displays the warning `Your connection is not private`.

### Procedure

1. In Google Chrome, enter `https://xxx.xxx.xxx:28443/WebUI`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. At the top of the browser window, click ⋮ > **More tools** > **Developer tools**.

3. On the Security tab, in the Security Overview area, click **View certificate**.

4. In the Certificate Viewer dialog box, click **Details**.

5. Click the certificate name, `ipoffice-Root`, and then click **Export**.

6. In the Save file as window, do the following:

   a. Choose a location to save the certificate.

   b. Type a name for the certificate.

   c. Select **Bas64-encoded ASCII, single certificate** from the drop-down list.

   d. Click **Save**.

7. In the Chrome browser, click **Tools** > **Settings**.

8. Scroll down to the Advanced area and click **Manage certificates**.

9. Click the **Authorities** tab.

10. Click **Import** and select **All Files**.

11. Select the certificate exported earlier and then click **Open**.

12. Select **Trust this certificate for identifying websites** and click **OK**.

    The device displays the Avaya certificate.

13. Click **Done** and then close all open windows and browser sessions.

# Configuring Google Chrome to accept certificates on Windows

**Procedure**

1. In Google Chrome, enter `https://xxx.xxx.xxx:28443/WebUI`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. Do the following to view certificates:

   a. At the top of the browser window, click ⋮.

   b. Click **More Tools** > **Developer Tools** > **Security**.

   c. On the Security Overview page, click **View certificate**.

3. In the Certificate dialog box:

   a. Click the **Certification Path** tab.

   b. Click the first node in the tree.

   c. Click **View Certificate**.

4. In the next Certificate dialog box:

   a. Click the **Details** tab.

   b. Click **Copy to file**.

5. In the Wizard that displays:

   a. Click **Next** twice.

   b. To choose a folder, click **Browse** and enter a file name.

   c. Save your changes.

   d. Click **Next** > **Finish**.

6. When prompted to close all dialog boxes, click **OK** and exit the browser.

7. In Windows Explorer, locate the file that you saved, and then do the following:

   a. Right-click the file and click **Install certificate**.

   b. Click **Next**.

   c. Click **Place all certificates in the following store**.

   d. Click **Browse** > **Trusted Root Certification Authorities**.

   e. Click **OK** > **Next** > **Finish**.

   f. In the Warning dialog box, click **Yes** > **OK**.

8. **(Optional)** Delete the file that you created.

### Result

You can now browse the application website without certificate warnings using the host name.

If you use the IP address, the system displays a certificate error next to the address bar and might produce an error at login.

## Configuring Google Chrome to accept certificates on macOS

### Procedure

1. In Google Chrome, enter `https://xxx.xxx.xxx:28443/WebUI`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. At the top of the browser window, click ⋮ > **Settings**.

3. Scroll down to the Advanced area and click **Manage Certificates**.

4. In the left navigation pane, do the following:

   a. In the Keychains area, click **Login**.

   b. In the Category area, click **Certificates**.

5. From the **File** menu, click **Import Items**.

6. In the displayed dialog box, navigate to the location of your saved file and click **Open**.

7. If prompted, enter the key pair password and click **OK**.

## Configuring Internet Explorer to accept certificates on Windows

### Procedure

1. In Internet Explorer, enter `https://xxx.xxx.xxx:28443/WebUI`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. Do the following to view certificates:

   a. In the browser window, click **Continue to this website**.

   b. Next to the address bar, click **Certificate error**.

   c. Click **View certificates**.

3. In the Certificate dialog box:

   a. Click the **Certification Path** tab.

   b. Click the first node in the tree.

   c. Click **View Certificate**.

4. In the next Certificate dialog box:

   a. Click the **Details** tab.

   b. Click **Copy to file**.

5. In the Wizard that displays:

   a. Click **Next** twice.

   b. To choose a folder, click **Browse** and enter a file name.

   c. Save your changes.

   d. Click **Next** > **Finish**.

6. When prompted to close all dialog boxes, click **OK** and exit the browser.

7. In Windows Explorer, locate the file that you saved, and then do the following:

   a. Right-click the file and click **Install certificate**.

   b. Click **Next**.

   c. Click **Place all certificates in the following store**.

   d. Click **Browse** > **Trusted Root Certification Authorities**.

   e. Click **OK** > **Next** > **Finish**.

   f. In the Warning dialog box, click **Yes** > **OK**.

8. **(Optional)** Delete the file that you created.

### Result

You can now browse the application website without certificate warnings using the host name.

If you use the IP address, the system displays a certificate error next to the address bar and might produce an error at login.

## Configuring Firefox to accept certificates on Windows and macOS
### Procedure

1. In Firefox, enter `https://xxx.xxx.xxx:28443/WebUI`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. On the Insecure Connection page that is displayed, click **Advanced** > **Add Exception**.

3. In the dialog box, click **View**.

4. In the next dialog box:

   a. Click the **Details** tab.

   b. To highlight the top row, in the Certificate Hierarchy area, click the top root node.

   c. Click **Export**.

   d. Select a folder and ensure that the file has a `.crt` extension.

   e. Click **Save** > **Close**.

   f. Click **Confirm Security Exception**.

5. Select **Options** from the **Tools** menu or next to the toolbar.

6. In the left navigation pane, click **Advanced**.

7. Click **Certificates** > **View Certificates**.

8. From the Authorities tab, do the following:

   a. Click **Import**.

   b. Select the file that you created and then click **Open**.

9. In the dialog box, do the following:

   a. Select **Trust this CA to identify web sites**.

   b. Click **OK**, close the dialog boxes, and then exit the browser.

10. **(Optional)** Delete the file that you created.

**Result**

You can now browse the application website without certificate warnings using the host name.

If you use the IP address, the system displays a certificate error next to the address bar and might produce an error at login.

# Configuring Safari to accept certificates on macOS

**Procedure**

1. In Safari, enter `https://xxx.xxx.xxx:28443/WebUI`.

   Replace `xxx.xxx.xxx` with the host name or the IP address of the IP Office Contact Center server.

2. Click **Show Certificate** in the Warning window.

3. Select the **Always trust** check box.

4. Click **Continue**.

5. Enter your operating system password to confirm the Certificate Trust Settings change.

6.  Click **Update Settings**.

**Result**

In the future, the browser will trust the certificate from the IP Office Contact Center server.

# Adding a certificate to Keychain Access on macOS

**About this task**

Use this procedure if you already have the certificate `.cer` file. This procedure describes how to install your certificate in Keychain Access.

**Procedure**

1.  Open Keychain Access from your Mac computer.

2.  At the bottom of the screen, click ⊞.

3.  Navigate to the location of the saved certificate.

4.  Select the certificate `.cer` file.

**Result**

The certificate is added to Keychain Access.

# Logging in to the user interface

**About this task**

Use this procedure to log in to the UI.

⚠️ **Warning:**

If the UI or browser crash or are closed before you log out, an improper session logout can occur and the logout process will not be properly completed on the server. When this situation occurs, wait for approximately three minutes before you log in to the UI again to avoid an unexpected logout. The following additional scenarios can cause this situation to occur:

- You perform a forced refresh using the `F5` key.
- You try to open a new URL in the same browser window or tab where the UI is running.
- You use the browser option to go back or forward one page.

**Before you begin**

- Obtain the IP Office server address from your system administrator.
- If you plan to use WebRTC, your administrator must enable the Sync Service. Otherwise, the UI will not be able to retrieve your WebRTC settings.

- After an upgrade, clear your browser cache. With most browsers, except Safari, you can use the `Ctrl` + `Shift` + `Delete` keyboard shortcut and then select the appropriate check box for your browser. With Safari, this keyboard shortcut is not available, so you must clear the cache from the browser settings.

**Procedure**

1. Navigate to `https://<Server address>:28443/WebUI` in your browser:

   If you are upgrading from a release prior to Release 10.0, you can choose to use the non-secure `http://<Server address>:28080/WebUI` URL. Otherwise, only the secure HTTPS URL will work. The non-secure HTTP connection is also blocked by the Cloud firewall and it cannot be used if you are using WebRTC.

   🛈 **Important:**

   For the HTTPS URL to work in Safari browsers, you must install the required IP Office Contact Center certificate in your Trusted store.

2. To change the application settings, do the following on the Login screen:

   a. Click **Settings** ( ⚙ ).

   b. Enter the IP address of the IP Office Contact Center server.

   c. Enter the IP Office Contact Center server port number.

   d. To use WebRTC, change the slider to green, and enter the IP address and port number of the WebRTC gateway.

   e. **(Optional)** Change the logging level.

      **Warning** is selected by default.

   f. Click **Save**.

3. On the Login screen, enter the following information:

   a. Your agent or supervisor user name.

   b. Your agent or supervisor password.

   c. Your telephone extension number.

   If you are using the WebRTC Gateway, the **Extension** field is replaced by the following:

   - **Phone Extension**: The integrated phone extension.

   - **Phone Password**: The integrated phone password.

   ✱ **Note:**

   After three failed login attempts, you are locked out for a predefined time. You can ask your administrator to reset your password to unlock your user ID. By default, the lockout time is set to 60 seconds and you can attempt to log in 3 times before you are locked out. The lockout time can be changed by an administrator in the IP Office Contact Center User Interface for Windows Configuration module.

If you are using WebRTC, the number of invalid login attempts also follows the IP Office configuration. If that number is exceeded, the error message `SIP server is not responding` will be displayed.

4. Click **Login** or press `Enter` on your keyboard.

**Next steps**

Sign in to your agent groups.

**Related links**

[Signing in and out of agent groups](#) on page 31

# Logging out of the interface

## About this task

Use this procedure to log out of the UI when your work shift ends. After you log out, you cannot receive calls until you sign in to your agent groups again.

You cannot log out while you are on an active call. The system automatically signs you out of all agent groups if you do not answer an incoming call in the required time.

## Procedure

1. In the left navigation pane, click .

2. Click **Log out**.

3. Click **Close** () to exit the UI.

# Changing your password

## About this task

Your password must consist of at least 8 characters from two or more of the following groups:

- Lower case letters
- Capital letters
- Numbers
- Special characters (`!, @, #, $, %, ^, &, *`)

## Before you begin

Ensure that you have the required privilege to change passwords.

**Procedure**

1. In the left navigation pane, click 🔘.

2. Click **Change Password**.

3. In the Change Password window, do the following:

   a. Enter your old password.

   b. Enter your new password and confirm it.

4. Click **OK**.

# Updating notification settings

**About this task**

Use this procedure to update the notification settings that are displayed when the UI is minimized or hidden. The notification options that you can set depend on what your administrator has configured in the Configuration module.

⊛ **Note:**

- Notifications are not supported in Internet Explorer (IE). If you are using IE, you can install an add-in from http://ie-web-notifications.github.io, or if you cannot install add-ins, you can set up pinned web sites using the instructions at https://msdn.microsoft.com/en-us/library/gg618532(v=vs.85).aspx. By pinning web sites, an image can be overlaid on the task bar for any task notification and the notification also flashes. You cannot use both the add-in and pinned web site options together.

- If the setting to show or block notifications keeps appearing in your browser, a Google Chrome administrative policy might be in force on the system. Contact your site administrator if you experience this problem.

**Before you begin**

You must have the "Change audio/visual notification" privilege.

**Procedure**

1. In the left navigation pane, click 🔘.

2. Use the **Visual notifications** and **Audio notifications** switches to enable or disable one or both notification options.

   ❗ **Important:**

   You can only set the options that your administrator has configured in the Configuration module. For example, if your administrator has only configured visual notifications, then you cannot enable audio notifications in the UI.

# Chapter 3: Navigation

## General interface options

The following tables display key buttons and options in the UI. You might need to click **More** (⬤) to access some options.

### General options

| Button | Name | Description |
|--------|------|-------------|
| ⚙ | **Settings** | Enables you to configure the server settings when you log in to the UI. If you are using WebRTC, you must also include the WebRTC settings information. |
| ⓘ | **Information** | Displays release information, including the version installed. |

### Agent and supervisor menus

| Button | Name |
|--------|------|
| 🏠 | **Home** |
| 📞 | **Telephony** |
| ✉ | **Email** |
| 💬 | **Chat** |
| 📊 | Includes a menu for **Realtime information**, **Reporting**, **Agent Status Reports**, and **Contact Detail Reports**. |

## Functionality and statistics

### Agent and supervisor Home screen functionality

The following table describes the general options you can access on the Home screen:

| Option | Description |
|---|---|
| Group sign in area | You can sign in to all your agent groups or select specific groups. |
| Messages | Agents can view messages from the supervisor.<br><br>Supervisors can send messages to agents. |
| Statistics | You can view general statistics, such as overall service levels and the average wait time for calls. You can also view the number of logged-in agents and supervisors. |

## Home screen statistics for agents and supervisors

The statistics on the Home screen are the same for agents and supervisors. All values displayed on this screen are for the overall contact center and are calculated by taking the average for all topics in the contact center.

> ✳ **Note:**
>
> Some statistics might not match what is displayed in the IP Office Contact Center User Interface for Windows. For example, the average wait time does not coincide with the value in the IP Office Contact Center User Interface for Windows. The IP Office Contact Center Web User Interface shows the average wait time for all topics in which telephony, email, or chat are enabled. The IP Office Contact Center User Interface for Windows shows the average time for individual topics.

The following tables describe the key telephony, email, and chat statistics on the Home screen.

### Telephony statistics on the Home screen

| Statistic | Description |
|---|---|
| Abandoned call monitor | The percentage of calls that were abandoned out of the total calls for each shift. |
| Service factor | The task service factor. This value is displayed as a percentage and indicates the overall quality of service. |
| Longest wait time | The longest wait time for a call in the queue. This value is calculated based on all topics in the contact center. |
| Average wait time | The average wait time for calls in the queue.<br><br>The formula used to calculate this value is the sum of the average wait time of topics for which Telephony is enabled divided by the number of such topics. Topics with an average wait time of 0 are not considered. |
| Current active calls | The number of active conversations through call distribution.<br><br>✳ **Note:**<br><br>For this statistic to work, an administrator must configure a virtual agent group with the name `ChromeAppAG`. Virtual agent groups can be configured in the IP Office Contact Center User Interface for Windows. |

*Table continues…*

| Statistic | Description |
|---|---|
| Average active calls | The average number of active conversations through call distribution. This average is calculated based on the time range configured in the IP Office Contact Center User Interface for Windows Administration tab under **Configuration** > **System** > **Real time information default values** > **Calculating time period**. <br><br> ✱ **Note:** <br><br> For this statistic to work, an administrator must configure a virtual agent group with the name `ChromeAppAG`. Virtual agent groups can be configured in the IP Office Contact Center User Interface for Windows. |
| Answered calls | The number of conversations per shift. |
| Abandoned calls | The number of abandoned calls per shift. |
| Logged in agents or supervisors | The number of logged-in agents or supervisors for telephony. |

## Chat statistics on the Home screen

| Statistic | Description |
|---|---|
| Service factor | The task service factor. This value is displayed as a percentage and indicates the overall quality of service. |
| Longest wait time | The longest wait time for an IM conversation in the queue. This value is calculated based on all topics in the contact center. |
| Average wait time | The average wait time for an IM conversation in the queue. <br><br> The formula used to calculate this value is the sum of the average wait time of topics for which Chat is enabled divided by the number of such topics. Topics with an average wait time of 0 are not considered. |
| Chats waiting | The number of waiting or pending IM conversations. |
| Logged in agents or supervisors | The number of logged-in agents or supervisors for chat. |

## Email statistics on the Home screen

| Statistic | Description |
|---|---|
| Service factor | The task service factor. This value is displayed as a percentage and indicates the overall quality of service. |
| Longest wait time | The longest wait time for emails in the queue. This value is calculated based on all topics in the contact center. |
| Average wait time | The average wait time for emails in the queue. <br><br> The formula used to calculate this value is the sum of the average wait time of topics for which Email is enabled divided by the number of such topics. Topics with an average wait time of 0 are not considered. |

*Table continues…*

| Statistic | Description |
|---|---|
| Emails waiting | The number of waiting or pending emails. |
| Logged in agents or supervisors | The number of logged-in agents or supervisors for email. |

## Telephony screen functionality

The following table describes the general options you can access in the Telephony screen.

| Option | Description |
|---|---|
| Call area | Displays the following:<br><br>• Active calls.<br><br>• Actions available for all calls.<br><br>★ **Note:**<br><br>After a customer leaves a conference call, the customer name is still displayed. If customer information is unavailable, nothing displays on the UI. The area where the customer name is usually displayed remains blank. |
| Content area | Displays the following:<br><br>• Customer Details: Customer history, notes about customer issues, and an option to search for information on the internet.<br><br>• Groups tab: Agent group statistics displaying the number of agents signed in to each channel. You can also sign in to or sign out of agent groups.<br><br>• Topics tab: Telephony topic statistics. For each topic, you can see Customers Waiting and Abandoned Calls. The Abandoned Calls tab shows calls dropped by the customer under Abandoned Calls, and calls dropped by IP Office Contact Center based on the task flow configuration under Call Dropped. By default, the task flow is configured to drop calls if the queue is full.<br><br>★ **Note:**<br><br>You can only reserve a call when the call is in the queue. You can pick up a queued call from the Customers Waiting area in the Topics tab.<br><br>• Users tab: A list of agents, their statuses, and the actions available for each agent. You can also view a complete list of names and contact numbers for the entire contact center. |

*Table continues…*

| Option | Description |
|---|---|
| Tertiary information | Displays telephony statistics, including: <br><br> • Answered calls. <br><br> • Outbound dialer calls. <br><br> • Average talk time. <br><br> • Incoming calls per hour, which are calculated and extrapolated. <br><br> ✱ **Note:** <br><br> The placed or outbound calls counter is increased for Direct Dialer, Campaign Dialer, and Agent Dialer calls, but not for Mechanic Dialer calls. |

## Telephony users

In the **Telephony** > **Users** tab, you can view the following:

- **Agents**
- **Contacts**

### Agents tab options

| Name | Description |
|---|---|
| Agent names and extensions | You can view a list of agent names and extension numbers. You can also search for agents by name. |
| Agent status information | Agents work states include the following: <br><br> • Signed off <br><br> • Available <br><br> • Do not disturb (DND) <br><br> • Busy |

### Contacts tab options

| Name | Description |
|---|---|
| **Search Contacts** field | Enables you to search for IP Office users by contact number. |
| User names and phone numbers | The UI displays a list of user names and phone number. You can also use the **Phone** button (📞) to call a user. |

## Telephony screen statistics for agents

The statistics on the Telephony screen are customized for the agent. Each statistic is based on the agent's performance during a shift. General statistics for the whole contact center are available on the Home screen.

| Statistic | Description |
|---|---|
| Answered calls | The number of conversations that the agent addressed during the shift. |
| Outbound dialer calls | The number of outgoing calls per shift. |
| Average talk time | The average conversation length per shift. |
| Incoming calls per hour | The average number of Automatic Call Distribution (ACD) calls per hour. This value is related to the time when the agent is signed in during the shift. |

# Email and chat functionality

### Email screen

| Option | Description |
|---|---|
| Search and folder views | On the left side of the Email screen, you can search for a specific email message or switch the folder view. |
| Email list | The left side of the Email screen displays the email issues that are assigned to you. |
| Reading pane and email actions | When you select an email, the email message displays on the right side of the screen.<br><br>After activating the email, you can access actions such as **Reply**, **Forward**, **Add attachment**, and **Send**. You might need to click **More** (⋯) to view some options. |
| Customer details | At the bottom of an email message, you can view customer details. |

### Chat screen

| Option | Description |
|---|---|
| Assigned chats tab | On the left side of the screen, you can see all of the open chat or IM conversations assigned to you. When you select a chat, the content displays on the right side of the screen. You can type messages, perform consultations or transfers, and end the chat session. You can choose to print the chat conversation before ending it. |
| Customer details | At the bottom of a chat conversation assigned to you, you can view customer details. |
| Archived chats tab | After you end an IM conversation, the conversation is stored in the Archived chats tab. You can use this tab to search for archived conversations on your server. You can also view other agents' conversations. |

# Supervisor Realtime Information and Reporting functionality

Supervisors can access agent functionality and the following additional functionality:

- Realtime Information
- Reporting

### Realtime Information screen

| Name | Description |
| --- | --- |
| Realtime statistics | The following tabs are available in the Realtime Information module:<br><br>• Agents<br><br>• Groups<br><br>• Topics<br><br>• Queue<br><br>• Other<br><br>When you click on each category, the system displays a high-level list of items. You can click each item to view details, such as the current status of agents or agent groups, details of current calls, and current service statistics. You can sort and filter the organization of real time information.<br><br>✱ **Note:**<br><br>As a supervisor, you can have a maximum total of 25 agents in the combined groups for which you are authorized. |

### Reporting screen

| Button | Description |
| --- | --- |
| **Choose Report** | You can select a report type from the available options, which are configured by your administrator. |
| **View Report** | You can view the last generated report after you select a report type. The options are:<br><br>• Display the report in full screen mode.<br><br>• Download the report.<br><br>• Print the report. |
| **Run Report** | You can generate a new report after you specify the start and end dates for the reporting period.<br><br>You can see the status of the report being generated. You can continue browsing through reports while the system generates a new report. |

# Realtime Information screen statistics for supervisors

The statistics on the Realtime Information screen enable supervisors to monitor real time activities in the contact center. The statistics on this screen show information at the individual topic or group level.

The following tables describe the key telephony, email, and chat statistics on the Realtime Information screen.

**Telephony statistics on the Realtime Information screen**

| Statistic | Description |
| --- | --- |
| Abandoned call monitor | The percentage of calls that were abandoned out of the total calls for each shift. |
| Service factor | The task service factor. This value is displayed as a percentage and indicates the overall quality of service. |
| Longest wait time | The longest wait time for a call in the queue. |
| Average wait time | The average wait time for calls in the queue. |
| Agents available | The number of available agents. |
| Total calls | The total number of answered and abandoned calls for each shift. |

**Chat statistics on the Realtime Information screen**

| Statistic | Description |
| --- | --- |
| Longest wait time | The longest wait time for an IM conversation in the queue. |
| Average wait time | The average wait time for an IM conversation in the queue. |
| Chats waiting | The number of waiting or pending IM conversations. |
| Agents available | The number of available agents. |

**Email statistics on the Realtime Information screen**

| Statistic | Description |
| --- | --- |
| Longest wait time | The longest wait time for emails in the queue. |
| Average wait time | The average wait time for emails in the queue. |
| Emails waiting | The number of waiting or pending emails. |
| Agents available | The number of available agents. |
| Total activated emails | The number of emails that were activated during the shift. |

# Part 1: Agent operations

# Chapter 4: General agent operations

This chapter describes general agent tasks that are available for all agents regardless of which channels they are signed in to. These tasks are not unique to the telephony, email, or chat channels. General agent tasks include the following:

- Signing in and out of agent groups.
- Taking breaks: This feature is available to all agents regardless of which channels they are signed in to.
- Working with customer details: You can access customer details and take notes about customer interactions related to telephony, email, or chat. Some minor differences in functionality exist depending on whether you are using telephony, email, or chat.

Information that is unique to the telephony, email, and chat channels are not described in this chapter. You can find this information in the subsequent chapters.

## Signing in and out of agent groups

**About this task**

Use this procedure to manually sign in to and sign out of agent groups. This procedure is not applicable if your administrator has configured automatic sign in with the IP Office Contact Center User Interface for Windows.

You can receive calls and, if applicable, emails and IMs from the groups that you are signed in to. The UI also displays your availability for the telephony, email, and chat channels, and indicates which channels you are signed in to.

**Before you begin**

Ensure your administrator has configured the required agent groups and virtual agent groups.

**Procedure**

1. On the Home screen:

   - To join all authorized agent groups, click **Join All Groups** (  ).
   - To select specific groups, click **Select Groups** (  ).

2. For each agent group, select whether you want to sign in to telephony, email, or chat.

   You can sign in to one or more of these channels. You can change the channels selected for each agent group at any time.

> **★ Note:**
>
> If your administrator has not configured the email and chat functionality, then these options are not available.

3. To sign out of all selected groups, in the Select groups dialog box, click **Clear All**.

   You can also choose to sign out of a specific agent group.

# Viewing agent work states and other agent group details

### About this task

The **Groups** tab displays the number of other agents available to answer calls. You can view information, such as the number of agents logged in and average wait time for calls. With this information, you can decide when to take a break, sign out, or switch agent groups. You can also expand individual groups to view detailed information about the group.

### Procedure

1. In the left navigation pane, click **Telephony** (🖥).

2. In the content area, click **Groups**.

   The system displays the number of agents signed in to the selected groups.

3. **(Optional)** To view individual groups, in the agent group, click **Expand** ( ↗ ).

   The system displays detailed statistics, including waiting callers.

   You can also:

   • Reserve a call from the queue.

   • Pick up a call.

   • Return a call from the list of abandoned calls.

# Agent work states

You can filter agents by status. For example, you can choose to only view agents that are set to "Available".

> **★ Note:**
>
> • Logged out agents are not displayed in the UI. If an agent is logged in to the interface, but not signed in to an agent group, the agent status displays as "Signed off". The agent status changes to "Available" when the agent signs in to the group. When the agent logs out of the interface, the agent is no longer listed in the UI.

- The "Available" state only appears if an agent is not on break or on a call. "Available" is overridden by other work states, such as "On Break" and "Busy".

**Channel availability**

The UI also uses colors to indicate whether you are signed in to all groups for a channel. In the following image example, the agent is:

- Signed in to all telephony groups. The agent is fully available on the Telephony channel.

- Signed in to at least one email group. The agent is partially available on the Email channel.

- Not signed in to any groups for chat. The agent is not available on the Chat channel.



# Starting and ending a break

**About this task**

When you request a break, you might be prompted to select a code describing the type and duration of the break.

**Procedure**

1. To view your Worked, On Break, and Last Break status, click ⏱ in the left navigation pane.

   You can see the status information for the telephony, email, and chat channels.

2. To start or end a break, click the button below ⏱.

**Result**

Your request to take a break might not be granted right away. The grey ☕ indicator appears next to the appropriate channel when your break request is pending.

When your break is granted, the red ☕ indicator displays next to the channels you are signed in to. While you are on break:

- You cannot receive contact center calls, emails, or IM chats. You start receiving new calls, emails, and chats again after you return from break.

- You cannot activate contact center emails. The **Activate** button becomes available again when you return from break.

# Agent break and work statistics

You can view the following work and break time information for an agent:

| UI statistic | Description |
|---|---|
| **On Break** | The time spent on break during the current shift. |
| **Last Break** | The time since the agent returned from their last break and resumed work. |
| **Worked** | The time spent working during the current shift. |

**Example scenario**

An agent works for 40 minutes and then goes on break for 5 minutes. When the agent resumes work, the **Last Break** timer resets to `0`. If the 5 minute break is the agent's first break for the shift, **On Break** displays `00:05`.

After 10 minutes of working:

- **Worked** displays `00:50`. This includes the 40 minutes spent working at the beginning of the shift plus the 10 minutes spent working since the agent returned from their last break.

- **Last Break** displays `00:10` because the agent has been working for 10 minutes since the last break.

- **On Break** continues to display `00:05` because, so far, the agent only spent 5 minutes on break during the current shift.

# Break policies and restrictions

Your administrator can configure a sign off prevention quota in the IP Office Contact Center User Interface for Windows or the IP Office Contact Center web administration portal. This quota defines the minimum number of agents that must remain signed in to agent groups. The administrator can also specify whether agents can take a break during sign off prevention. Unless break time is allowed by your administrator, you will not be able to take a break during sign off prevention.

The following are examples of circumstances that might prevent you from taking a break:

- Call volume is high.

- Multiple agents are already on break. A certain number of agents must always be available.

- Another break was taken recently.

The grey ☕ indicator appears next to the appropriate channel when your break request is pending. If you request a break while you are on a call, your break request is granted after the call is completed. When your break is granted, the red ☕ indicator displays next to the channels you are signed in to.

# Working with customer details

**About this task**

You can view customer details at the bottom of an email or IM conversation, while you are on an active call, or during wrap-up time for a call.

You can also:

- Take notes and view notes from other agents.
- View information resources from configured websites.

**Before you begin**

To perform research on the internet, your administrator must configure the websites you can access.

**Procedure**

1. If you are on a call, click **Call Details** in the content area.

   Customer details automatically appear at the bottom of emails and IM conversations.

2. To view general information, click **Customer Details** (👤).

   The following type of information appears if available:

   - Name
   - Phone number
   - Account number
   - Priority of the customer

   The customer details for a call also display the call tags that your administrator configured in the IP Office Contact Center User Interface for Windows.

3. To enter notes, click **Notes** (✏️) and describe the customer issues in the text area.

4. To view a history of notes entered by other agents, click **History** (📅).

   Notes are also displayed in the **Search** tab.

   Long notes are partially visible. You might need to expand an entry to read the full note.

> ❗ **Important:**
>
> The History tab is not available for chat. You can use this feature with telephony and email.

5. To search for additional customer records, such as email exchanges, click **Search** (🔍).

   You can search by:

   - Telephone number
   - Email ID
   - Jabber ID

6. To perform research on the internet, click on an available website.

   Depending on your system configuration, a browser window or tab might automatically open in the UI.

# Chapter 5: Telephony

This chapter describes how to perform telephony tasks. For information about general agent operations, such as working with breaks and customer details, see the "General agent operations" chapter.

To use telephony functionality, you must enable telephony when you sign in to your agent groups. From the Telephony screen, you can handle incoming and outgoing calls, and view telephony statistics for the shift. You can also view customer details while you are on an active call or during wrap-up time for a call. The customer details for a call also display the call tags that your administrator configured in the IP Office Contact Center User Interface for Windows. You can only view call tags in the IP Office Contact Center Web User Interface, but you cannot edit them from this UI.

> ✱ **Note:**
>
> If you lose connection to the server while on a call, the Telephony screen becomes unresponsive and you might not see the complete call details. After the connection to the server is restored, you might need to log out and log back in to the UI. If you are using a desk phone, your call remains connected when you log out of the UI. Call details will appear properly starting with the next call, but you might not see the correct call details for the current call.

**Call duration**

While on an active call, you can see the call duration timer. The talk time displayed on the timer is calculated for the current call. The talk time does not include the time taken for internal transfers and putting calls in the queue.

# Outbound dialer calls

IP Office Contact Center uses the outbound dialer functionality to automatically assign outgoing calls to agents. An outbound caller ID is generated for each call. Outbound dialer calls can be set up in the following ways:

- IP Office Contact Center makes the outgoing call automatically. After the connection with the called party is established, IP Office Contact Center immediately distributes the call to an agent to handle.

- IP Office Contact Center distributes details about the call to an agent in Preview mode. The agent can choose to start the call immediately or wait for the pre-announcement to expire.

- IP Office Contact Center makes the outgoing call

For more information about outbound dialer, see:

- *Avaya IP Office Contact Center Feature Description*
- *Administering Avaya IP Office Contact Center Dialer*

# Call response and qualification types

When you are on an outbound dialer call, the call area can display one of the following responses. You must select the appropriate response code at the end of the call.

**Outbound dialer call responses**

| Type of response | Description |
|---|---|
| Call answered by intended recipient | The recipient answers the call, and you confirm that the person at the other end is the intended party. |
| Call answered, but intended recipient unavailable | The recipient answers the call, and you confirm that the person at the other end is not the intended party. You can leave a message asking the intended party to call back and then disconnect the call. |
| Call answered by voice mail | The call is connected and reaches the voice mail box or answering machine. You can leave a message asking the intended party to call back and then disconnect the call. |
| Called number is busy | The call is unanswered, and you hear a busy tone. The system tries to make the call again. |
| Called number not in service | The call is unanswered, and you hear a fast busy tone or an automatic announcement that the number is not in use. |
| Call answered by fax machine | The call is connected and reaches a fax machine or modem. |
| No Answer | The call is connected, and you hear a call back tone. If the maximum wait time for an answer is exceeded, the call disconnects automatically. The system tries to make the call again later. |
| Wrong Number | The recipient answers the call, and you identify that the number is no longer used by the intended party. |

**Closure options**

You can select closure options defining the outcome of the call. Example of closure options are described in the following table.

| Option | Description |
|---|---|
| **Closure** (⊠) | Specifies that the call was unsuccessful and provides an explanation, such as:<br><br>• Follow up<br><br>• Answering machine<br><br>• Wrong number<br><br>• New number |
| **Closure RPC** (⊙) | Confirms that the job was completed. |
| **Closure as Fax Abandoned Call** (⊲) | Specifies that a fax machine answered the call. |

# Managing calls in the user interface

## Answering calls

### About this task

After you sign in to your agent groups, the **Telephony** (📞) button on the left flashes if you have an active call.

### Procedure

In the call area, click **Answer** (📞).

## Making a call

### About this task

Use this procedure to make calls. If you are using a Chrome OS device, you can choose to manually dial numbers using the Chrome numeric keyboard.

### Procedure

1. In the call area, click **Dial** (⊞).

2. To make a call by dialing a number manually, do the following:

   a. In the pop-up menu, click **Manual**.

   b. In the **Enter Number** field, enter the number or extension.

   c. If you want to make an outgoing topic call, select **Outgoing ACD call**.

    d. Select **Internal** for a subscriber within the PBX or **External** for a subscriber outside the PBX.

    e. Select a topic.

> ⊛ **Note:**
>
> For outgoing ACD calls, you cannot dial a topic number.

    f. To start the call, click **Phone** (🔵).

3. To make an internal call to a phone number in your contact list, do the following:

    a. In the pop-up menu, click **Internal**.

    b. From the contact list, select the number to dial and then click **Phone** (🔵).

# Making conference calls

**Before you begin**

An active call must be in progress.

**Procedure**

1. In the call area, click **Consultation** (🔵).

2. In the pop-up menu, do one of the following:

   - In the **Internal** tab, select the appropriate user and then click **Phone** (🔵).

   - In the **Manual** tab, type a destination number in the **Enter Number** field and click **Phone** (🔵).

   The system establishes a two-party call with the user you called.

3. To establish a three-way conference call, click **Conference** (🔵).

4. **(Optional)** If there is no response from the third party, click **Hang up** (🔴) to end the call.

# Putting calls on hold

**Before you begin**

An active call must be in progress.

**Procedure**

1. In the call area, click **Hold** (🔵).

2. To resume the call, click **Hold** (🔵) again.

# Entering digits during a call

### About this task

You might need to enter dual-tone multi-frequency (DTMF) digits during certain calls. For example, in your voice mailbox, you use DTMF digits to enter your login password and select options.

### Procedure

1. In the call area, click **More** (⬤).

2. Click **DTMF** (⬤).

3. Select the required digits.

4. Click **Close** (✖) to close the window.

# Transferring calls

### About this task

You can perform unsupervised and assisted call transfers. With unsupervised or blind transfers, you perform the transfer without consulting the party that the call will be transferred to. The call can be transferred to any topic or agent group. With assisted transfers, you consult the party before completing the transfer.

### Before you begin

An active call must be in progress.

### Procedure

1. In the call area, click **Consultation** (⬤).

2. In the pop-up menu, do one of the following:

   - In the **Internal** tab, click **Phone** (⬤).
   - In the **Manual** tab, type a destination number in the **Enter Number** field and click **Phone** (⬤).

3. Click **Transfer** (⬤).

4. If the extension is busy, click **Hang up** (⬤) next to the call that you want to drop.

# Requesting supervisor support during a call

### About this task

During a call with a customer, you can request emergency assistance from a supervisor. The supervisor joins the call to provide assistance.

**Before you begin**

An active call must be in progress and the call cannot be on hold. If the call is on hold, the supervisor will not be able to join.

**Procedure**

In the call area, click **Emergency** (⊕).

The **Notification** (🔔) icon turns red and a signal is activated on the supervisor's interface.

**Result**

The supervisor can join the call at any time. If the supervisor hangs up, you and the customer remain connected on the call.

# Ending calls

**About this task**

During wrap-up time, you can select job codes that define the outcome or result of the call. You cannot receive a new call until you finish selecting job codes.

★ **Note:**

During wrap-up time, the **Dial** button is available only if you have the Extend Wrap-Up privilege.

**Procedure**

1. In the call area, click **Hang up** (📞) to end your call.

   Your administrator can configure the system to automatically enter wrap-up time at the end of a call. A timer shows the amount of time you have by default.

   If a job code is mandatory for the call, the **Job Codes** button flashes until you select a job code.

2. If your administrator has configured mandatory job codes, select the appropriate job codes and enter any other required notes for the call.

   You can enter a key word in the **Search** field to find a job code.

3. **(Optional)** To extend your wrap-up time, click **Extend ACW** (◎).

4. When you have finished selecting job codes and entering notes for the call, click **Finish**.

   Wrap-up time ends. You can receive new calls.

# Chapter 6: Email and chat

## Email operations

You can perform the following tasks from the Email screen if you enable email when you sign in to your agent groups:

- View unread emails. When you receive a new email, a visual notification displays in the UI.
- Create and send emails.
- Reply to the sender of an email or to all users on the email distribution list.
- Forward an email to one or more people.
- Delete emails. You can only delete topic emails if your administrator has given you the appropriate privilege.
- Save email drafts. For example, if you start typing an email but cannot finish right away, then you can save the draft and finish typing the email later.
- Add attachments, such as files and images, to an email before sending it.
- View customer details at the bottom of a customer email.
- Reassign or delegate customer emails to another agent or supervisor.
- Update the status of emails. After you finish addressing a customer action, you can set the email status to **Complete**. If you cannot address a customer issue right away, you can set the email status to **Defer** and then follow up on the email later.
- Select job codes that define the outcome of the email exchange.
- Print emails.
- View archived emails if your administrator has given you the appropriate privilege.
- Use spell check.
- Use address books.
- Access customer history.

# Searching for emails

### About this task

You can search for emails in any folder and sort emails by criteria. The left side of the Email screen lists the emails that are assigned to you.

😊 **Note:**

You can only search for keywords in the email subject and not in the email body.

### Procedure

1. From the drop-down menu, select the folder that you want to search.

2. In the **Search** field, type the appropriate keywords.

   For example, you can type part of the subject.

   ➕ **Tip:**

   You might need to click **More** for the UI to display the latest search results.

3. **(Optional)** Sort emails based on the available criteria.

   You can sort emails by the:

   • Date received

   • Name of the sender in alphabetical order

   • Topic to which the email is allocated in alphabetical order

# Activating or picking up an email

### About this task

Before you can reply to an inactive email, you must activate it. You can also pick up emails that you want to address from the Overview folder.

### Procedure

• To activate an inactive email, click **Activate**.

• To pick up an email, from the Overview folder, click **Pick** (🖱).

  😊 **Note:**

  In the IP Office Contact Center Web User Interface, the **Pick** (🖱) button is only available for emails in the queue.

# Creating, replying to, and forwarding emails

### About this task

You can create new emails, reply to emails assigned to you, and forward emails. New, unread emails have a blue indicator, and these emails are considered inactive.

When working with customer emails, you can access available customer details and take notes about your current interaction. For more information about customer details, see Working with customer details on page 35.

### Before you begin

Before replying to an inactive email, click the **Activate** button. **Reply** replaces the **Activate** button.

### Procedure

1. Do one of the following:

   * To create a new email, click **Compose** (⊘).
   * To reply to the sender of an email, click **Reply**.
   * To reply to everyone on the email distribution list, click **More** (⊙) and then select **Reply all** (◁).
   * To forward an email to someone, click **Forward** (➡).

2. If you are creating a new email, enter a subject.

3. Type a message.

4. **(Optional)** Do one of the following to add an attachment:

   * Click **Add attachment** (📎) and then select the file that you want to attach.
   * Drag and drop the file that you want to attach onto the email.

   > ✱ **Note:**
   >
   > If you attach a file with & in the file name, the email recipient will not receive the attachment.

5. When you are ready to send the email, click **Send**.

# Saving an email draft

### About this task

If you cannot finish an email right away, you can save a draft and then finish the email later. You can access saved emails from the Drafts folder.

**Procedure**

1. Start typing an email.

2. To save a draft of the email, click **Save** (🖫).

# Selecting a job code

## About this task

Use this procedure to select a job code. If you already selected a job code, you can also update your selection. Only one job code can be associated with an email topic.

## Before you begin

Your administrator must configure job codes in the IP Office Contact Center User Interface for Windows. When configuring job codes in the IP Office Contact Center User Interface for Windows, your administrator can choose whether to make job code selection mandatory or optional.

## Procedure

1. Select the appropriate email.

2. Click **More** (⬤).

3. Click **Job Codes** (#).

4. Select a job code from the list.

   If the topic is configured to use job codes, you can search for a specific job code using the **Search** field.

5. Click ⏎ to submit your selection.

## Result

The job code selected for an email displays in the email header.

# Changing the status of an email

## Setting an email to Complete

### About this task

When configuring job codes in the IP Office Contact Center User Interface for Windows, your administrator can choose whether to make job code selection mandatory or optional. If job code selection is mandatory, you must select a job code before you can set an email to **Complete**. If job code selection is optional, you can set an email to **Complete** right away without selecting a job code.

### Procedure

1. Select the appropriate email.

2. **(Optional)** If job code selection is mandatory, select a job code.

3. Click **Complete** ( ).

**Result**

Completed emails are stored in the Completed folder. These emails do not appear in your Inbox.

## Deferring an email

### About this task

If you cannot immediately address a customer email, you can put the email item on hold and then address it later. When you defer an email, you can set a follow-up date and add notes for yourself.

### Procedure

1. Select the appropriate email.

2. Click **More** ( ).

3. Click **Defer** ( ).

4. In the pop-up window:

    a. Click   and select a follow-up date.

    b. Use the arrows to select a follow-up time.

       For example, you can set the follow-up time to `12:28 PM`.

    c. **(Optional)** Enter a note for yourself.

    d. Click **OK**.

### Result

The deferred email is stored in the Delayed folder until the follow-up date. At the specified time, the email reappears in your Inbox.

## Reassigning an email

### About this task

You can reassign or delegate an email to another agent or supervisor. You can also delegate an email to a specific topic.

### Procedure

1. Select the appropriate email.

2. Click **More** ( ).

3. Click **Delegate** ( ) to reassign the email.

4. In the pop-up window, do the following:

    a. Select the appropriate agent, supervisor, or topic from the list.

You can use the **Search** field to help you find a specific name.

b. **(Optional)** Enter a note or instructions.

c. Click [↵].

**Result**

Reassigned emails no longer appear in your Inbox.

# Chat operations

You can perform the following tasks from the Chat screen if you enable chat when you sign in to your agent groups:

- View unread instant messaging (IM) notifications. When you receive a new IM, you can see a visual notification in the UI.
- Respond to an IM from a customer. Agents cannot start a new IM conversation.
- Work with multiple IM conversations at a time. The default is three.
- Use spell check.
- Add emoticons or smiley faces in an IM conversation.
- Print an IM conversation.
- View customer details during an IM conversation.
- View completed or archived conversations.
- Perform a chat consult.
- Transfer a chat conversation.
- Access customer history.

## Replying to a chat conversation

### About this task

Use this procedure to reply to an IM from a customer. New, unread customer conversations have a blue indicator. You can work with multiple conversations at a time.

During an IM conversation with a customer, you can access available customer details and take notes about your current interaction. For more information about customer details, see Working with customer details on page 35.

### Procedure

1. On the left side of the Chat screen, click the **Assigned chats** tab.

2. Select the appropriate IM conversation.

New, unread conversations are automatically activated when you select them.

3. Type a message.

> ➕ **Tip:**
>
> When you copy text from documents, such as Microsoft Word or PDF documents, some characters, such as single or double quotes, might not appear properly. If you copy text, retype these characters manually before sending your IM.

4. To send your IM, do one of the following:

- Click ⬆ .

- Press Enter on your keyboard.

**Related links**

Enabling and disabling spell checks for chat on page 50

# Starting a chat consultation

### About this task

You can perform a consultation during a chat conversation to obtain the information you need to address a customer issue.

### Procedure

1. During an active chat conversation, click ⊕.

2. In the dialog box that is displayed, do one of the following to start a consultation:

   - From the Internal tab, select an agent.

   - From the System tab, select a topic.

   - From the Manual tab, in **Enter Jabber ID**, type the chat ID of an external user and click 💬.

   The consultation session is added to the original chat conversation.

3. **(Optional)** Click the appropriate option to toggle between the original chat conversation and the consultation session.

# Chat transfers

You can transfer the chat to:

- The same user with whom you have a chat consultation.

- Another agent, topic, or external user if you are not on a chat consultation.

## Transferring a chat conversation to the user with whom you have a consultation

### Procedure

1. Start a chat consultation as described in <u>Starting a chat consultation</u> on page 49.

2. If your administrator has configured mandatory or forced job codes, click ⊕ to select a job code.

3. To complete the transfer, click ⇄.

### Result

The chat is transferred along with its history, for reference.

## Transferring a chat conversation to any agent, topic, or external user

### About this task

This procedure describes how to perform a blind or unsupervised transfer. In this case, a consultation is not established beforehand.

### Procedure

1. During a chat conversation, click ⇄.

2. In the dialog box that is displayed, do one of the following:

   • From the Internal tab, select an agent.

   • From the System tab, select a topic.

   • From the Manual tab, in **Enter Jabber ID**, type the chat ID of an external user and click
     💬.

### Result

The chat is transferred along with its history, for reference.

# Enabling and disabling spell checks for chat

### About this task

You can enable and disable the spell check functionality during an IM conversation.

### Before you begin

Ensure that you have internet access.

### Procedure

1. On the left side of the Chat screen, click the **Assigned chats** tab.

2. In the IM conversation, use the ᵃᵇᶜ and ᵥabc buttons to enable or disable the spell check functionality.

**Related links**

## Setting the appropriate language for spell checks

### Before you begin

Ensure that spell check is enabled for chat.

### Procedure

1. In your browser, do the following:

   a. Set the appropriate language.

   b. Select the **Use this language for spell checking** check box.

2. In the IP Office Contact Center Web User Interface, to ensure that the appropriate language is set, do the following:

   a. Right-click an empty area to view detected spelling errors.

   b. From **Spellcheck**, ensure that the correct language is selected.

# Ending a chat

### About this task

After an issue is resolved, use this procedure to complete or end the chat conversation. After you end a conversation, you cannot reopen it.

> ✳ **Note:**
>
> After the customer or consulting agent leaves the chat conversation, you must end it in order to become available for other chat tasks.

### Procedure

1. On the left side of the Chat screen, click the **Assigned chats** tab.

2. Select the appropriate IM conversation.

3. At the top right of the IM conversation, click **End chat**.

4. In the pop-up window do the following:

   a. Select one of the available job codes.

      If the topic is configured to use job codes, you can search for a specific job code using the **Search** field.

   b. Click ↵ to submit your selection.

### Result

Completed conversations are stored in Archived chats. These conversations are removed from Assigned chats.

# Searching for archived conversations

## About this task

After you end an IM conversation, the conversation is stored in the Archived chats tab. You can search for any archived IM conversation on your server.

✱ **Note:**

If you do not replace copied characters, such as single and double quotes, then the conversation that contains these characters might not appear in the Archived chats tab.

## Before you begin

You must have the "Advanced archive view" privilege.

## Procedure

1. In the Chat screen, click the **Archived chats** tab.

2. Use the first drop-down menu to filter conversations by date.

   You can view conversations from:

   • Today. This option is set by default.

   • The last 7 days.

   • The last 15 days.

   • The last 30 days.

3. **(Optional)** In the **Search** field, type the appropriate keywords.

   For example, you can enter a topic name to find IM conversations related to that topic.

4. **(Optional)** To search for a specific agent's conversations, select the agent from the drop-down menu below the **Search** field.

5. Select the conversation you want to view.

   The conversation appears on the right side of the screen.

## Related links

[Replying to a chat conversation](#) on page 48

# Part 2: Supervisor operations

# Chapter 7: Real time information

This chapter describes what supervisors can do using the Realtime Information module.

The Realtime Information screen contains the following tabs:

- Agents
- Groups
- Topics
- Queue
- Other

You can click on an item in the tabs to expand it. Some of the agent and group information provided is also available to agents. For a detailed description of agent statistics, including break and work time statistics, see the "Agent operations" part in this document.

You can access additional configuration options for the Realtime Information module from the IP Office Contact Center User Interface for Windows.

## Viewing agent and group information in real time

### About this task

Real time monitoring enables you to manage agent actions and perform customer service tasks when needed.

> ✱ **Note:**
>
> As a supervisor, you can have a maximum total of 25 agents in the combined groups for which you are authorized.

### Procedure

- **(Optional)** On the Home screen, send a message to agents if required.

  You can also sign in to agent groups to pick up calls from the queue or to perform other agent tasks.

- Click 🔳 and select **Realtime information**.

- To view and update information for a specific agent, click the **Agents** tab.

You can:

- Search for an agent or work state.

- View agent work states and break information. You can also force an agent to take a break or sign out.

- View the agent groups that the agent is signed in to.

- View the channels that the agent is signed in to. The available channels are telephony, email, and chat.

The following is an example of the type of information that is displayed in the Agents tab:
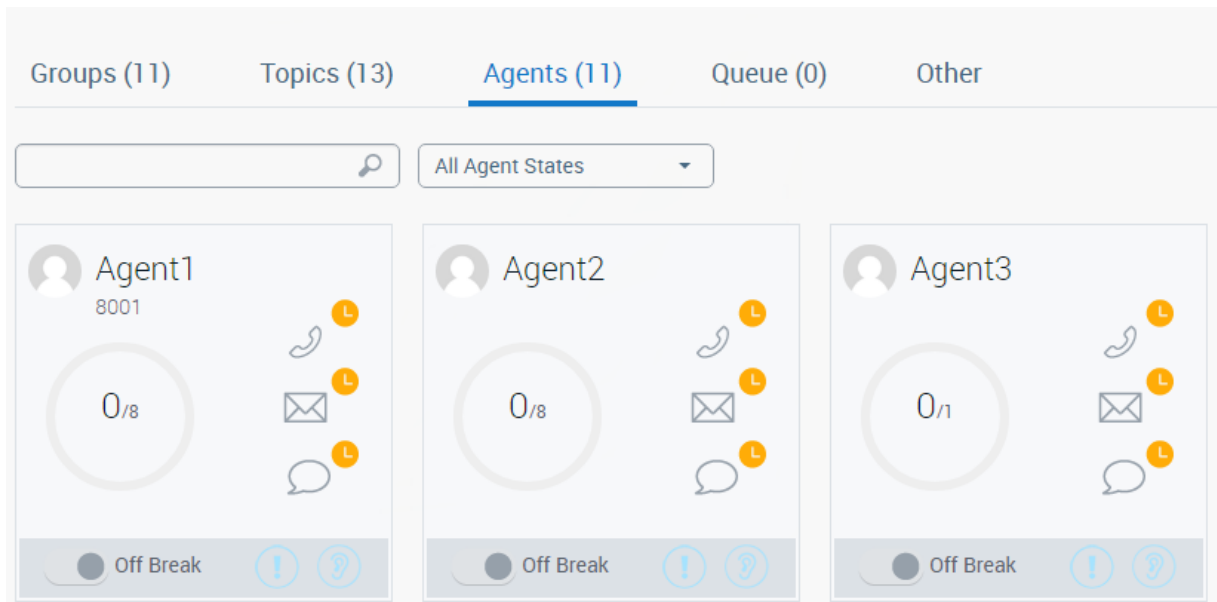


- To monitor an agent group:

  1. Click the **Groups** tab.

  2. Expand the group that you want to view in detail.

     For each group, you can see the agents that are signed in to each channel. You can view additional information, including the status of each agent, when you expand a group.

- To view information about topics, including waiting calls in the queue and abandoned calls, click the **Topics** tab.

For each topic, you can see the longest and average wait times, an abandoned call monitor for telephony, a service factor indictor, and the total number of tasks (calls, emails, or chat conversations). Queue and Abandoned Calls tabs are also displayed. The Abandoned Calls tab shows calls dropped by the customer under Abandoned Calls, and calls dropped by IP Office Contact Center based on the task flow configuration under Call Dropped. By default, the task flow is configured to drop calls if the queue is full.

The following example shows the telephony information available for a topic:
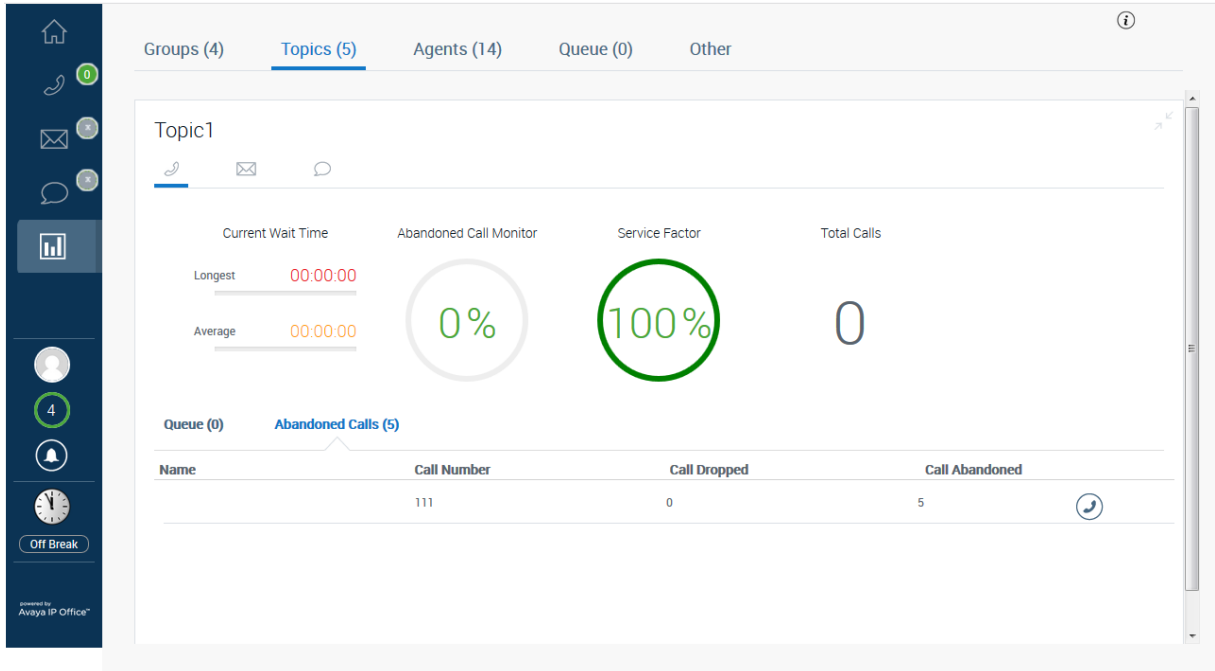
**Related links**

# Assigning calls from the queue

**About this task**

As a supervisor, you can assign a waiting call to yourself or to another agent. To answer calls yourself, you must be signed in to an agent group and your status must be "Available". Otherwise, the **Pick** button will be disabled. When a call is directed to a specific group, the call will automatically be assigned to an available user in that group.

Use this procedure to assign a call from the queue to an available user in another group.

**Procedure**

1. Click 📊 and select **Realtime information**.

2. Click the **Topics** or **Queue** tab.

   The Topics tab enables you to see the waiting calls for a specific topic. The Queue tab shows all waiting calls.

3. To assign the call to another user, select the appropriate user from the **Assign to** drop-down menu.

You can only assign a call to an available user. If no users are available, the drop-down menu will be empty.

**Related links**

[Answering calls](#) on page 39

# Monitoring an agent call silently

### About this task

As a supervisor, you can silently monitor calls anytime. You do not need the "Silent Monitoring" privilege to perform this task in the IP Office Contact Center Web User Interface.

> ✳ **Note:**
>
> The Silent Monitoring option only becomes available after the agent's first call.

### Procedure

1. Click 📊 and select **Realtime information**.

2. To monitor agent calls silently, click ⓘ from the Agents, Groups, or Queue tab.

### Result

The agent and customer cannot hear you when you silently monitor the call. However, depending on the IP Office configuration, they might hear a beep when the call is being monitored.

# Joining a call when an agent requests emergency assistance

### About this task

As a supervisor, you can join a call when an agent requests emergency assistance. You do not need the "Supervisor Emergency" privilege to perform this task in the IP Office Contact Center Web User Interface.

> ✳ **Note:**
>
> The Emergency option only becomes available after the agent's first call.

### Procedure

After an agent requests emergency assistance:

1. Click the 🔔 indicator on the left side of your screen and use the menu that is displayed beside the indicator to select the notification.

   You are directed to the Realtime Information screen.

Using the Avaya IP Office Contact Center Web Interface

2. Click the glowing  indicator to join the call.

> ❗ **Important:**
>
> You cannot join the call if it is on hold. Agents should not put the call on hold when they request emergency assistance.

**Result**

When you join the call, it becomes a three-way conference between you, the agent, and the customer. If you drop from the call, the agent and customer still remain connected.

# Viewing variables

**About this task**

Administrators can configure variables in the Web UI tab of the IP Office Contact Center User Interface for Windows UI Configuration module. Use this procedure to view these variables in the IP Office Contact Center Web User Interface. You cannot edit variables in the IP Office Contact Center Web User Interface.

**Procedure**

1. Click  and select **Realtime information**.

2. Click the **Other** tab.

   The UI displays a list of variables.

# Chapter 8: Reports

You can view and generate manual historical reports from the Reporting tab. The reports record, examine, assess, and present all important IP Office Contact Center system data.

**Advantages of reporting**

You can use Reporting to:

- Ensure continuous quality of service.
- Identify peak times that can be counteracted by proper coordination among contact center personnel.
- Evaluate performance and calculate expenses for the time needed to process a call or email.
- Use the information from reporting evaluations as a basis to assess and respond to seasonal events or increase in customer requests.
- Record feedback about promotions and marketing measures.

# Report types

You can activate reports for two different user groups:

- Private: You can enable private reporting for the user who defined the report.
- Public: You can enable reporting as public, so that all users with privileges can view the configured report type.

You must define a time frame for the report survey. The options are months, weeks, days, total period, and a user-defined time in hours and minutes.

The report is displayed in the following formats:

- Tabular format: The report displays as a table. The order of events is organized based on custom groupings.
- Graphical display: The report displays as a line graph, bar chart, or pie chart. This display is not available for all agent groups and topic counters.

In the report view, you can use the toolbar to directly export, print, and send reports through emails.

# Viewing existing reports

### About this task

Use this procedure to view reports that you generated in the past.

> ✱ **Note:**
>
> If the administrator updates a report, then the previous version of the report is overwritten. The new version of the report is displayed. The old version is no longer displayed.

### Before you begin

Ensure your administrator configures the setting **Use basic data period/output only** in the IP Office Contact Center User Interface for Windows for each report. Otherwise, the reports will not be displayed in the user interface.

### Procedure

1. Click 🔳 and select **Reporting**.

2. Select **View Report**.

3. To find the appropriate report, in the Choose a Report screen, do one of the following:

   • Enter a key word in the **Search** field.

   • Scroll down through the list of all reports.

   The system displays the selected report on the right side of the screen.

4. To change the report view, click **Previous Report Viewer**.

5. To view the report in full screen mode, click **Expand** (⊘).

   > ➕ **Tip:**
   >
   > If you click **Previous Report Viewer** and then expand the report, the previous report view is lost. You must click **Previous Report Viewer** again.


# Generating a report

### About this task

You can generate a report using one of the available report types.

### Procedure

1. Click 🔳 and select **Reporting**.

2. Select **Run Report**.

3. To find the report, in the Choose a Report screen, do one of the following:

   • Enter a key word in the **Search** field.

- Scroll down through the list of all reports.

4. To set the specifications for your report, do the following:

   a. Select a start and an end date, and a time.

   b. If you want to limit the days and times for which reports are generated, select the appropriate options in **Only Report**.

5. To create a new report, click **Generate Report**.

   The system displays a status bar in the **View Report** field indicating the progress of the report.

# Managing and exporting reports

**About this task**

This procedure describes how to:

- Download a report
- Print a report
- Change the font settings of a report
- Export a report
- Email a report

You can access these options from the View Report tab. Some of these options are only visible after the report preview loads.

**Procedure**

1. Select a report from the left pane.

2. To download the report, click **Download** (⊕).

3. To print the report, click **Print** (⊕).

4. To change the font size for the report, select an option from the **Font** drop-down menu in the report preview pane.

5. Select one of the following options from the report preview pane to export a report:

   - ▣ : To export the report in PDF format.

     You can use the drop-down menu to specify the PDF orientation or you can select **Auto**.

   - ▣ : To export the report as an image in PNG format.

   - ▣ : To export the report as an Excel spreadsheet.

   - ▣ : To export the report in CSV format.

6. To send the report in an email, do the following:

   a. Click ✉ .

      Use the following steps to complete the information in the E-mail dialog box.

   b. Specify the format for the report.

      If you selected PDF, you can select a size. If you select A3 or A4 from the **Size** drop-down menu, you can also choose to select the Landscape check box.

   c. Enter a recipient email address and then click **Add**.

      You can add multiple recipients.

   d. Click **OK** when you are ready to send the email.

# Chapter 9: Agent status and contact detail reports

In addition to the standard Reporting module, supervisors can also access the Agent Status Reports and Contact Detail Reports modules. For more information, see *Avaya IP Office Contact Center Reporting Task Based Guide*.

You can create or export reports in the following formats:

- PDF
- CSV
- Excel

You can view Agent Status Reports and Contact Detail Reports in all browsers.

**Agent Status Reports module:**

Agent Status Reports provide a statistical evaluation of agent activities. You can use this module to track when and how often agents sign in, sign out, and take breaks. You can also view presence information and break times for one or more agents. In counter-based reports, you can only evaluate presence and break times.

**Contact Detail Reports module:**

Contact Detail Reports provide a statistical evaluation about all task types, which include Telephony, Email, and Chat. This module provides information about callers, dialed topics, conversation lengths, and agents involved with each task type. Counter-based reports provide only summary values, such as the number of calls, number of conversations, total conversation times, and average conversation times.

The following table summarizes the areas of application available with the Contact Detail Reports module:

| Option | Description |
|---|---|
| Invoicing for customers (inbound) | Invoicing is based on services rendered. |

*Table continues…*

| Option | Description |
|---|---|
| Reporting user processes | This option provides information about:<br><br>• How customers communicate with the IP Office Contact Center system.<br><br>• The topics and agents that are involved.<br><br>• How long customers communicate and with whom. |
| Detailed task type processes | Processes are broken down by task type for each IP Office Contact Center agent. |

# Agent status report data

The following table describes all possible agent status report data. The UI does not display all of this data by default. To modify the data that is displayed, you can click on the column header, and then from **Columns**, select the data that you want to see.

| Column name | Description |
|---|---|
| **Agent name** | Displays the name of the agent associated with the agent activity. |
| **Start time stamp** | Displays the date and time. The system records all agent activity with a time stamp. |
| **Login/logout** | Specifies whether the agent is logged in or out of the system regardless of the task type. |
| **Sign on/sign off** | Specifies whether an agent is signed in or out of an agent group.<br><br> ✱ **Note:**<br><br>Agents are also signed out if they do not answer a call, email, or IM within the configured timeout period. In this case, **Sign on/sign off** displays **Sign Off (RONA)** for the agent. |
| **Break Time** | Specifies whether an agent is on a break.<br><br>If the agent takes a break and signs out of an agent group, **Break Time on** is displayed. If the agent signs in after the break, **Break Time off** is displayed. |
| **Wrap Up without call** | Specifies the status of manual wrap-up time, which is started by the agent manually and is independent of a call. |
| **Additional info** | Displays additional information when an activity starts. |
| **Task type** | Displays the task type. |

# Contact detail report data

The following table describes all possible contact detail report data. The UI does not display all of this data by default. To modify the data that is displayed, you can click on the column header, and then from **Columns**, select the data that you want to see.

| Column name | Description |
|---|---|
| **Voicemail is recorded** | Specifies whether the contact started with a voice mail message being recorded.<br><br>The report can display the following options:<br><br>• **Yes**: Contact begins with recording a voice mail message.<br><br>• **No**: Other. |
| **Contact type** | Displays how the contact was established with the customer. The options are: Dialer, ACD, or Other. |
| **Start time stamp** | Displays the contact start time stamp. |
| **Total duration (s)** | Displays the duration of the call in seconds. This excludes the wrap up time. |
| **Total duration with ACW (s)** | Displays the duration of the call in seconds, including the wrap up time. |
| **End time stamp** | Displays the date and time when the contact was recorded as complete. This excludes the wrap up time. |
| **End time stamp with ACW** | Displays the date and time when the contact was recorded as complete. This includes the wrap up time. |
| **Task type** | Displays the task type. |
| **Caller/Sender** | Displays the caller number, email address, or chat ID. |
| **Selected address** | Displays the telephone number, email address, or chat ID that is selected by the caller. |
| **Original topic** | Displays the name of the topic that first handled the caller. |
| **Initial Interaction** | Displays the initial contact connection status with the following details:<br><br>• **ConnectedDirect**: Connected without a queue.<br><br>• **ConnectedQueued**: Connected with a queue without an announcement.<br><br>• **ConnectedQueuedAnnounce**: Connected with a queue and an announcement.<br><br>• **DroppedOverload**: Disconnected by the system due to overload.<br><br>• **DroppedBusy**: Disconnected by the system because the system is busy.<br><br>• **DroppedCanceled**: Disconnected by the system by a call flow.<br><br>• **AbandonedAlerting**: Disconnected by the caller during a call.<br><br>• **AbandonedQueued**: Disconnected by a caller in the queue without an announcement.<br><br>• **AbandonedQueuedAnnouncement**: Disconnected by a caller in the queue with an announcement.<br><br>• **Callback**: Call back according to the queue position.<br><br>• **Rejected**: Wrong number dialed by an agent for an outgoing topic call. |
| **Number of customer records** | Displays the number of customer records that were matched with the caller using the customer configuration. |

*Table continues…*

| Column name | Description |
|---|---|
| Interaction time (s) | Displays duration of the call, email or chat conversations in seconds. This excludes the time when the call was on hold. |
| Hold time (s) | Displays the total hold time in seconds. |
| Wait time (s) | Displays the total waiting time in seconds. This includes the time spent on IVR, ringing, and queue. |
| Alerting time (s) | Displays the total time in seconds spent on call ringing, chat, and email alerts at the destination. |
| Queue time (s) | Displays the total time in seconds spent on IVRs and announcements. |
| Number of customer records | Displays the number of connecting legs that define the contact. |
| Number of customer connections | Displays the number of connecting legs, which have an established connection with the customer. |
| Chargeable time (s) | Displays the total time in seconds spent to complete a call on a chargeable number. |
| Number of consultations | Displays the number of consultations or transfers that define the contact. |
| Number of consultation calls | Displays the number of consultation calls or supervised transfers that define the contact. |
| Consultation speech time | Displays the total time spent on consultation calls. This excludes the hold time. |
| Wrap up time (s) | Displays the time in seconds spent on completing the post call work. |
| Direct topic dial in contact | Specifies whether the subscriber selected the topic. Also, indicates whether the contact was inbound or outbound. |
| External contact | Specifies whether the contact is external or internal. |
| Inbound contact | Specifies whether the contact is inbound or outbound. |
| OutCC contact | Specifies whether the contact is an outgoing call center call. <br><br> The report can display the following options: <br><br> • **Yes**: Contact was an outgoing call center call. <br><br> • **No**: Other. |
| Dialer contact | Specifies whether the contact is established using the Dialer functionality. <br><br> The report can display the following options: <br><br> • **Yes**: Contact established using dialer. <br><br> • **No**: Other. |

# Additional details

You can click ⌄ in the new viewer or 🔍 in the old viewer to view additional details.

The following additional details are provided:

| Type of information | Details displayed |
|---|---|
| Connections information | • **Details**<br><br>• **Start time stamp**<br><br>• **Caller/Sender**<br><br>• **Caller/Sender Name**<br><br>• **Customer number**<br><br>• **Customer priority**<br><br>• **Selected address**<br><br>• **First topic**<br><br>• **Last topic**<br><br>• **Task type**<br><br>• **Initial Interaction** (connection status)<br><br>For more information about initial interaction connection status details, see <u>Initial Interaction</u> on page 65.<br><br>• **Call time**<br><br>• **Speech or active time**<br><br>• **Wait time**<br><br>• **Time on hold**<br><br>• **Chargeable time of connection**<br><br>• **Wrap up**<br><br>• **Consultation**<br><br>• **Routed**<br><br>• **Voicemail is recorded**<br><br>• **Dialer contact**<br><br>• **Network overflow** |
| Topic Information | • **Start time stamp**<br><br>• **Topics**<br><br>• **Destination name**<br><br>• **Wait time**<br><br>• **Announcement**<br><br>• **Announcement script**<br><br>• **IVR script**<br><br>• **Welcome announcement** |

*Table continues…*

| Type of information | Details displayed |
|---|---|
| Destination Information | • **Start time stamp** <br><br> • **Destination name** <br><br> • **Destination** <br><br> • **Destination type** <br><br> • **Agent group** <br><br> • **Topics** <br><br> • **Wait time** <br><br> • **Ring time** <br><br> • **Speech-/active time** <br><br> • **Time on hold** <br><br> • **Wrap up** <br><br> • **Job Codes** |

# Appendix A: Resources

## Documentation

| Document title | Use this document to | Audience |
|---|---|---|
| Overview | | |
| *Avaya IP Office Contact Center Feature Description* | Understand IP Office Contact Center features and capabilities. | All users |
| Planning | | |
| *Avaya IP Office Contact Center Reference Configuration* | Understand IP Office Contact Center deployment topologies, network architecture, system capacities, product interoperability, and functional limitations of specific configurations. | • Sales and support personnel<br>• Architects<br>• Implementation engineers |
| Administering | | |
| *Using the Avaya IP Office Contact Center Configuration and User Interface Configuration Modules* | Perform administration tasks with the Configuration and UI Configuration modules.<br><br>✱ **Note:**<br><br>This document is also available as a help system through the product interface. | Administrators |
| *Administering Avaya IP Office Contact Center Dialer* | Work with the Dialer module in the IP Office Contact Center interface. | Administrators |
| Using | | |
| *Using Avaya IP Office Contact Center for Windows* | Use the IP Office Contact Center User Interface for Windows. | All interface users, including agents, supervisors, and administrators. |

## Finding documents on the Avaya Support website

**Procedure**

1. Navigate to http://support.avaya.com/.

2. At the top of the screen, type your username and password and click **Login**.

3. Click **Support by Product** > **Documents**.

4. In **Enter your Product Here**, type the product name and then select the product from the list.

5. In **Choose Release**, select an appropriate release number.

6. In the **Content Type** filter, click a document type, or click **Select All** to see a list of all available documents.

   For example, for user guides, click **User Guides** in the **Content Type** filter. The list displays the documents only from the selected category.

7. Click **Enter**.

# 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.

## Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips
- Information about service packs
- Access to customer and technical documentation
- Information about training and certification programs
- Links to other pertinent information

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to http://www.avaya.com/support.
2. Log on to the Avaya website with a valid Avaya user ID and password.

   The system displays the Avaya Support page.
3. Click **Support by Product** > **Product Specific Support**.
4. In **Enter Product Name**, enter the product, and press `Enter`.
5. Select the product from the list, and select a release.
6. Click the **Technical Solutions** tab to see articles.
7. Select relevant articles.

# Glossary

| | |
|---|---|
| **After Call Work mode** | A mode in which agents are unavailable to receive calls. Agents enter the After Call Work (ACW) mode to complete forms, select job codes, or perform other activities that are related to a previous call. |
| **agent** | An agent who typically handles customer service tasks. A user can be associated to an agent. Only agents can receive tasks from call center routing. An agent can log in to one or more specific media types. The agent media states are independent of each other. For example, an agent can be signed on for email and signed out for voice. Agents can belong to one or more agent groups. |
| **agent group** | A tool for categorizing and organizing agents. Agent groups are used as routing targets for customer calls and emails. The UI tracks customer service statistics for agent groups. Skills are allocated to agents in agent groups, and calls can be routed to agents based on their skills. An agent can be part of multiple agent groups. Agents must sign on to an agent group to receive calls that are routed to that group. |
| **Automatic Call Distribution** | A programmable feature at the contact center. Automatic Call Distribution (ACD) handles and routes voice communications to queues and available agents. ACD also provides management information that can be used to determine the operational efficiency of the contact center. |
| **module** | An IP Office Contact Center component or application. The components for the Agent, Supervision, and Administration tabs in the IP Office Contact Centerinterface are examples of modules. The Wallboard application is also referred to as a module. |
| **Task flow** | A process that explains how each telephony, voice, email, or chat task type is processed within IP Office Contact Center. For every task type, a task flow set can be defined. |
| **user** | Agents, supervisors, or administrators that can log in to the IP Office Contact Center UI to use or administer parts of the system. Unique privileges can be assigned to each user. |
| **Wrap-up time** | The time that a call center agent spends completing a transaction after the call is disconnected. Wrap-up time starts automatically and includes work directly associated with the call, such as taking notes or selecting |

job codes. The time does not include time spent in meetings, breaks, or correspondence.

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