



Using Avaya Workspaces for Avaya Oceana[®]

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Chapter 1: Introduction

Purpose

This document describes how to use the features of Avaya Workspaces for Avaya Oceana[®]. The intended audience is contact center agents and supervisors.

Change history

Issue	Date	Summary of changes
2	Nov 2021	Minor updates.
1	Apr 2021	Initial issue for Avaya Oceana [®] Release 3.8.1.

Changes in this release

Avaya Workspaces Release 3.8.1 includes the following changes:

Support for approval of outbound emails

Avaya Oceana[®] introduces support for approval of outbound agent email replies. For customer satisfaction and to avoid escalations, an agent's email responses can now be routed through an approval process.

Avaya Analytics[™] supports the ability to generate custom reports on the approval or rejection of the outbound emails for both real-time and historical operations.

Support for integration of Avaya Workspaces for Avaya Oceana[®] and Avaya Workplace Client

As a SIP-based Avaya Aura Unified Communications endpoint, you can deploy Avaya Workplace Client for all Avaya Oceana[®] and Avaya Analytics[™] registered users. Avaya Oceana[®] users can

use Avaya Workplace Client as a softphone with Avaya Workspaces for handling Oceana® routed and non-Oceana® routed voice contacts. Additionally, customers can now deploy remote Avaya Oceana® users (Supervisors and agents) on the Internet using Avaya Workplace Client as the Avaya Aura Unified Communications endpoint for Oceana® routed voice contacts and direct non-Oceana® routed voice contacts.

Avaya Analytics™ generates reports on Avaya Oceana® with the Avaya Workplace Client in the same manner as non-Avaya Workplace Client users.

Support for integrating social messaging platforms with Avaya Oceana®

You can integrate social messaging platforms with Avaya Oceana® through the Avaya Digital Connection. The Avaya Digital Connection is a software platform that enables businesses to communicate with their customers across several popular messaging apps.

Avaya Oceana® supports messaging with the following social platforms:

- WhatsApp
- Facebook Messenger
- Twitter Direct Message

Chapter 2: Overview

Avaya Workspaces overview

Avaya Workspaces is a browser-based application with which Contact Center agents can handle outbound and inbound customer interactions. Interactions can be through channels such as Voice, Email, SMS, Chat, Social Media, and Messaging. Agents can also make outbound voice calls and send outgoing emails. The intuitive user interface provides features for toggling between multiple, simultaneous interactions through different channels.

The application enables seamless collaboration with customers, partners, and other users within and outside the organization. It also provides relevant information to agents securely and reliably.

Every interaction is displayed as an interaction card. Using interaction cards, agents can:

- Receive the interaction: Accept interactions with a single click.
- Hold or resume the voice interaction: Put an active voice interaction on hold when another interaction with a higher priority must be attended to.
- Consult another agent: Seek advice about an interaction.
- Transfer the interaction to another agent: Send the interaction to another agent interaction area.
- Add another agent to the interaction: Create a conference with another agent when the other agent can contribute to resolving the customer interaction.
- Record work codes reporting to record work codes: Select from the configured work codes to report the type of work done during the interaction.
- Record disposition codes reporting to record disposition codes: Select from the configured disposition codes to add disposition to the interaction.
- Defer email interaction using interaction cards.
- Approval of outbound agent email replies - Agent email responses can be routed through an approval process.

For accessibility purposes, Avaya Workspaces is optimized to conform with both Section 508 and WCAG 2.0 AA standards. Avaya Workspaces provides:

- Access to most content and controls by using the keyboard or mouse.
- Alternative text and labels to assist users with screen-readers.
- A color palette that meets requirements for users with visual impairments.
- Screen magnifier tool, such as Magnifier, to zoom in and out of Avaya Workspaces screens.

Do not use built-in controls of the browser.

Checklist for setting up Avaya Workspaces

No.	Task	Reference	✓
1	Ensure that Avaya Workspaces is deployed and configured.	See <i>Deploying Avaya Oceana</i> [®] .	
2	Ensure soft phones and deskphones are registered.	This step is not mandatory for agents who have only SMS, web chat, video, email, and messaging contact types.	
3	Get your user name and password from your supervisor.	Use the instructions and login credentials sent to you by email when your user profile is set up in Avaya Workspaces.	

Supported browser versions

For information about the supported browsers for Avaya Workspaces, see *Avaya Oceana*[®] *Solution Description*.

Chapter 3: Navigation

Agent Workspace page

The Agent Workspace page has an intuitive layout that provides simultaneous contact channels such as Voice, Chat, Social, SMS, Email, and Messaging.

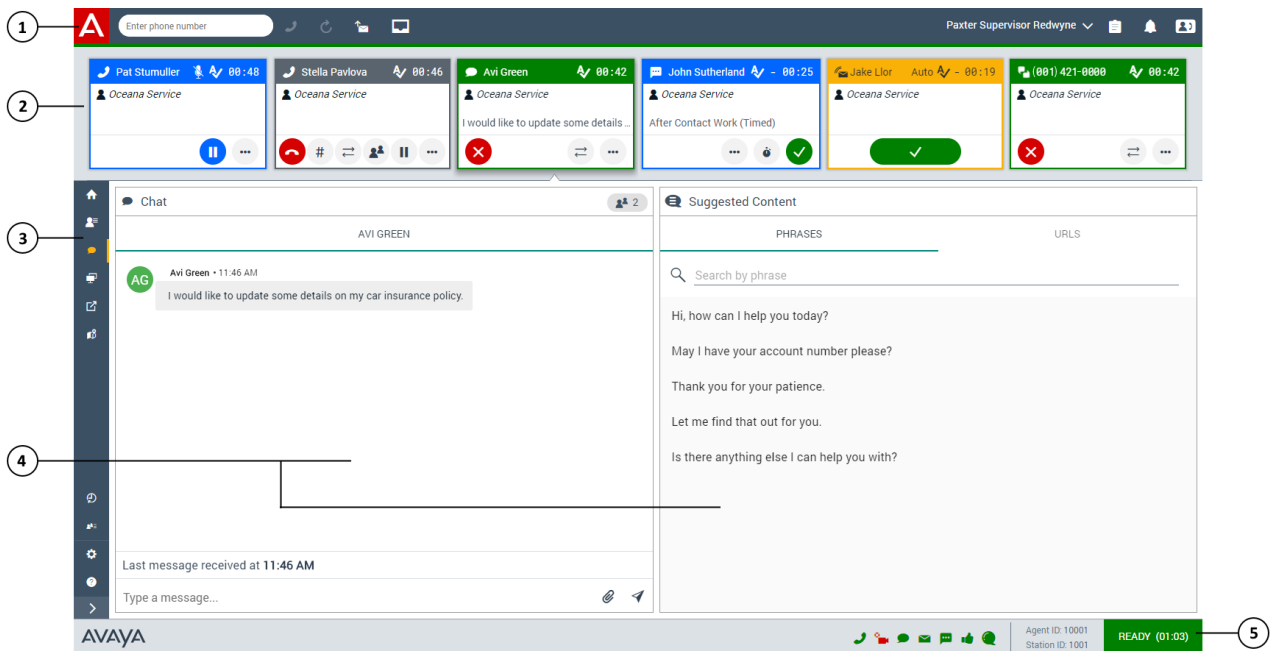


Figure 1: Agent Workspace page

The page has the following areas:

Number	Name	Description
1	Agent toolbar	Provides options for quickly making voice calls, creating required emails, viewing interaction logs, viewing notifications, viewing deferred interactions list, changing agent states, accessing team view, and accessing the Address Book.

Table continues...

Number	Name	Description
2	Interaction area	Displays all incoming interactions for the agent on any channel, as a Work Card. The interaction cards are queued for the agent at any time.
3	Navigation menu	Provides options according to the type of interaction.
4	Interaction widgets	Displays information related to the interaction.
5	Agent state summary	Displays the agent ID, Station ID, the current state of the agent, and the channels available for interactions. Agent state summary also includes Time in State Timer when enabled.

Avaya Workspaces does not dynamically update the drop-downs within the work card for Services, Work Code, and Disposition Code. Avaya Workspaces populates the list for the agent when the agent accepts an interaction and selects the drop-down. Avaya Workspaces caches this list and updates it if the agent refreshes the browser.

Compressed layout

An administrator can enable compressed layout for all agents through the Administrator Settings in Avaya Workspaces. The compressed view maximizes the on-screen area in Avaya Workspaces for widgets by minimizing the Agent toolbar, the footer and the work cards.

However, with compressed view:

- You must hover over the card button area to make the button visible. For example, a chat agent with multiplicity cannot view the text of recent messages on out of focus work cards. To view the text of the incoming chat, the chat agent must bring the chat interaction card into focus.
- The size of the work card is reduced.

The administrator determines whether to enable or disable the compressed view.

Administrator mode

When a user logs into Avaya Workspaces as an administrator, Avaya Workspaces displays the Widget Framework home page. Administrators can access tools and documentation using which they can modify and create layouts and widgets for agent and/or supervisors in Avaya Workspaces. The following is a brief overview of these tools, comprehensive documentation is presented when the administrator logs into Avaya Workspaces.

The Layout Manager allows the administrator to change the layout of the widgets within Avaya Workspaces. These layouts can be configured based on interaction type.

The Widget Manager gives the administrator the ability to add or remove widgets from Avaya Workspaces. This includes custom widgets.

The Layout Migrator assists the user in migrating layouts and widgets from older versions of Avaya Workspaces. The Layout Migrator checks that layouts and widgets are compatible with the latest version of Avaya Workspaces. If not, it assists the administrator in merging custom layouts

and widgets into the new release. The Layout Migrator also removes any core widgets that are no longer compatible with Avaya Workspaces.

The Widget Framework API enables third-party developers to write custom widgets and deploy them in Avaya Workspaces. To write a custom widget, you need access to the Widget API Developer Documentation and code examples. The Widget API is designed to make it easier for anyone with a basic understanding of HTML, CSS and JavaScript to write a custom widget and deploy it in Avaya Workspaces.

Neo Framework is a CSS framework that can be used in the creation of custom widgets for Avaya Workspaces. It contains a color palette and a number of core components that assist the development and rapid prototyping of custom widgets. Widgets developed using the Neo CSS framework have a consistent look and feel to core Avaya Workspaces widgets.









Agent Workspace field descriptions

Agent toolbar

Name	Description
Enter phone number	Used to enter a phone number to make a voice call. To dial the last dialed number, click the ↶ icon. If you type digits in the phone number field, click the 📞 icon to dial the number.

Table continues...

Name	Description
Agent name drop-down	<p>Used to access the following options:</p> <ul style="list-style-type: none"> • Start work: To begin work for the day. After clicking start work, the visual cue below the toolbar changes to green. You can then begin working on interactions. • Exit: To log out and exit Avaya Workspaces. The exit screen appears. If single sign-on (SSO) is enabled and you want to immediately log on to Avaya Workspaces again, click Click here if you wish to return to return to the Activate Agent screen. <p>The Exit option is available only after you click Finish Work.</p> <p>The following options are available from the drop-down arrow next to the agent name after clicking Start work:</p> <ul style="list-style-type: none"> • Additional Work: To transition to a Not Ready state for handling tasks related to a customer interaction that must be completed outside the Avaya Workspaces. <p>When an agent changes the state to Additional Work, the visual cue below the toolbar changes to blue.</p> <ul style="list-style-type: none"> • Go Not Ready: To indicate that the agent is not ready to take a call. The options for the not ready state depend on the reason codes configured through Avaya Control Manager. The system displays only those user codes contained in the data groups that are assigned to the agent in Avaya Control Manager. <p>The agent cannot choose specific interaction types on which to go not ready. No interactions are routed to the agent in the not ready state.</p> <p>When an agent changes the state to Not Ready, the visual cue below the toolbar changes to yellow.</p> <p>When an agent changes the state to Not Ready or Additional Work while there are active interactions, the status changes to Not Ready Pending.</p> <ul style="list-style-type: none"> • Go Ready: To indicate that the agent is available to receive interactions. <p>The Go Ready option is available only after an agent clicks Not Ready or Additional Work. Go Ready is not available on the first login.</p> <p>When an agent changes the state from Not Ready to Ready, the yellow line below the toolbar changes to green.</p> <p>Go Ready state is not available when the agent selects Additional Work when there are active interactions.</p> <ul style="list-style-type: none"> • Finish Work: To indicate that the agent has completed work for the day. <p>When an agent clicks Finish Work, the visual cue below the toolbar changes to grey.</p>

Icon	Name	Description
	Call	Call the number you provide.
	Call mailbox	Call the mailbox. This icon is visible only when a mailbox is available.
	Call supervisor	Call the supervisor.
	Create email	Create an email.
	Interaction logs	View Interaction logs. Interaction logs display the last 15 interactions, which includes incoming, outgoing, and missed interactions. The system provides options for call back and clears these logs when the Agent logs out. The interaction log also displays the forwarded email list with the forward email icon.
	Notification logs	View Notification logs. Notification logs display the last 15 notifications. The system clears these notifications after 24 hours.
	Address book	View the address book.
	Deferred interactions	View deferred emails.

Interaction area











Icon	Name	Description
	Inbound voice interaction	Indicates an inbound voice interaction.
	Inbound video interaction	Indicates an inbound video interaction.
	Inbound generic channel interaction	Indicates an inbound generic channel interaction.
	Outbound voice interaction	Indicates an outbound voice interaction.
	Outbound video interaction	Indicates an outbound video interaction.
	Outbound generic channel interaction	Indicates an outbound generic channel interaction.
	Outbound email interaction	Indicates an outbound email interaction.
	Alerting chat interaction	Indicates an alerting chat interaction.
	Alerting voice interaction	Indicates an alerting voice interaction.
	Alerting video interaction	Indicates an alerting video interaction.

Table continues...























Icon	Name	Description
	Alerting SMS interaction	Indicates an alerting SMS interaction.
	Alerting social interaction	Indicates an alerting social interaction.
	Alerting email interaction	Indicates an alerting email interaction.
	Alerting generic interaction	Indicates an alerting generic interaction.
	Alerting messaging interaction	Indicates an alerting messaging interaction.
	Alerting outbound interaction	Indicates an alerting outbound interaction.
	Chat interaction	Indicates a chat interaction.
	Email interaction	Indicates an email interaction.
	SMS interaction	Indicates an SMS interaction.
	Social interaction	Indicates a social interaction.
	Video interaction	Indicates a video interaction.
	Generic Channel interaction	Indicates a generic channel interaction.
	Messaging interaction	Indicates a messaging interaction.
	Accept call	Accepts an inbound voice call.
	Callback	Indicates a callback call.
	Accept video call	Accepts an inbound video call.
	Accept interactions	Accepts a chat, email, SMS, social, or messaging interaction.
	Hold/Resume interaction	Pauses or resumes the current interaction. When an active interaction goes on hold, the color of the interaction card changes to blue. When an interaction on hold becomes active, the color of the interaction card changes to green.
	End	Ends the current interaction.
	Force End	Terminates the stuck interaction.
	DTMF dial	Provides DTMF key inputs for IVR or voicemail. Customer side WebRTC clients support DTMF tones on a WebRTC voice call.
	More	Provides more options for the interaction. For example, to view more information about the interaction or set a work code. Work codes indicate the kind of work accomplished with the interaction.

Table continues...




























Icon	Name	Description
	Send message	Sends message in a chat, SMS, email, social, or messaging interaction.
	Watson	Signifies the chatbot leg of the conversation on the Chat transcript.
	Work code	Displays the work code set for the interaction.
	Disposition code	Displays the disposition code for the interaction.
	Extend timed After Call Work (ACW)	<p>Extends the after work call time.</p> <p>An agent can use Agent Desktop to enter an After Call Work (ACW) mode either while working on a contact or immediately after releasing the contact.</p> <p>Agents must enter the appropriate call disposition codes to perform post-call processing work, such as adding contact information to a Customer Relationship Management (CRM) system. Agents can enter the disposition codes only for post-call processing work related to the contact they just released.</p> <p>Agents can enter the disposition codes:</p> <ul style="list-style-type: none"> • while working on a contact, which prevents Agent Desktop from presenting new contacts to the agent. • after releasing the contact, and before Agent Desktop presents a new contact to the agent or the agent goes into the Not Ready or Additional Work state.
	Close timed after call work	Closes the timed after call work card.
	Auto answer	Displayed on work card when an interaction is or has been auto-answered.
	Transfer	<p>Transfers an active interaction to another agent, address book, or service.</p> <p>When you click the  icon, the system displays a drop-down list which enables you to transfer the contact to a member of your Team, Address Book, Service, depending on configuration, or you can manually enter a number.</p>
	Defer email	<p>Defers an email.</p> <p>When you click the  icon, you can enter the defer reason and the deferred date and time.</p>

Table continues...

Icon	Name	Description
	Retrieve deferred email	Retrieves a deferred interaction from the deferred interaction list. This icon does not appear in the interaction area but in the deferred interaction list drop-down in the agent toolbar.
	Toggle video overlay	Toggles video overlay of the agent.
	Hide video	Hides the agent video.
	Consult	Adds another agent to the interaction. When you click the  icon, the system displays a field to type the extension of the agent whom you want to add to the interaction.
	Conference	Adds the consulted agent to the interaction and begins a conference between the agent working on the interaction card, the consulted agent, and the customer.
	Mute/Unmute interaction	Mutes or unmutes the current interaction. This icon is only available on voice interactions in an active state for WebRTC agents.
	Service Observe	Permits the supervisor to observe an agent's interaction with the customer. This icon is available only for Supervisors.
	Stop Observe	Permits the supervisor to stop observing an agent's interaction with the customer. This icon is available only for Supervisors.
	Coach	Permits the supervisor to coach an agent. To coach, the supervisor must first observe the interaction. This icon is available only for Supervisors.
	Barge in	Permits the supervisor to barge in to an interaction to help close a sale or interact with the customer. To barge in, the supervisor must first be coaching the agent in the interaction. This icon is available only for Supervisors.
	Broadcast message	Permits the supervisor to broadcast a message to agents. This message is displayed as a toast notification. This icon is available only for Supervisors.
	Close	Closes the interaction.

Co-Browse icons

Icon	Name	Description
	Request cobrowse	Requests control for the Co-Browse session.
	Release control	Release control of the Co-Browse session.
	Refresh	Refresh the Co-Browse session.

Navigation menu

You can expand the navigation menu to see the description of the icons when required.



Icon	Name	Description
	Welcome Page	<p>Displays the Team and Welcome widgets.</p> <p>The Team widget provides the list of team members and the Search field.</p> <p>The Welcome widget displays the web page that the administrator selects in Avaya Control Manager.</p> <p>The Welcome page does not support the <code>x-Frame-Options: deny</code> HTML tag.</p>
	Customer information	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • Customer Details: Displays the basic customer contact details such as Account, CRMID, Email, Phone, and Social Handle for non-CRM integrations. <p>For CRM integrations, the widget displays Customer Name, Address, ZIP code, and one Custom Field in addition to the basic customer details.</p> <ul style="list-style-type: none"> • Interaction Details: Displays the customer interaction channel, participants, customer interaction, and direction. • Customer History: Displays previous interactions with the customer with the date and time, status, priority, and channel of the customer request and provides access to customer history search. <p>The Destination Address field in the Interaction Details widget displays the route point name.</p> <p>Agents can view the customer information widgets for all Avaya Oceana® interactions. With the exception of voice history, all other interaction history details of the customer are displayed in this widget.</p>

Table continues...




Icon	Name	Description
	View chat widgets	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • Chat: Displays messages in the chat interaction. • Suggested Content: Displays frequently used phrases and URLs with information that you can use to process the customer's request through the chat interaction. <p>You can click the phrases and URLs to add them to the chat. You can click the pencil icon to edit phrases before adding them to the chat interaction.</p> <p>This navigation icon is available only when a chat interaction card is in focus.</p>
	Email	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • Email: Displays the customer email. • Email template: Displays the email templates. • Suggested Responses: Displays frequently-used phrases that you can use to process the customer's request quickly through the Email interaction. <p>The customer information is available for any interaction type.</p>
	SMS	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • SMS: Displays messages in the SMS interaction. • Suggested Content: Displays frequently used phrases and URLs with information that you can use to process the customer's request quickly through the SMS interaction. <p>You can click the pencil icon to edit phrases before adding them to the SMS interaction.</p> <p>You can click phrases and URLs to add them to the chat.</p> <p>This navigation icon is available only when an SMS interaction card is in focus.</p>

Table continues...


Icon	Name	Description
	<p>Messaging</p>	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • Messaging: Displays messages in the messaging interaction. • Sample Library: Displays frequently used phrases and rich interactive messages that you can use to continue the engagement with the customer in the messaging interaction. <p>Agents can send text messages and images with Reply, Postback, and Link buttons.</p> <p>During an active messaging interaction, agents can share and view the following types of rich interactive messages:</p> <ul style="list-style-type: none"> • Text • Text with emojis • Images, GIFs, stickers • Audio and video clips • Location • Carousel • Location request <p>During an active messaging interaction, agents can receive the following types of rich interactive messages from end users:</p> <ul style="list-style-type: none"> • Text • Text with emojis • Images, GIFs, stickers • Audio and video clips • Location • Postback message • Carousel • Location request <p>End users can also view these rich interactive messages.</p> <p>Reply responses do not have a separate message type. Agents receive them as usual text messages.</p> <p>This navigation icon is available only when a messaging interaction card is in focus.</p>

Table continues...








Icon	Name	Description
	Generic Channel	Displays the Generic Channel widget.
	Co-Browse	<p>Displays the Co-Browse widget with which you can access, browse, and edit the form that the customer is accessing, provided the customer has enabled Co-Browse on the web page.</p> <p>The Co-Browse navigation icon is available only when a chat interaction card is in focus.</p>
	Customer journey	<p>Provides a graphical representation of the end-to-end journey of the customer in the following views:</p> <ul style="list-style-type: none"> • Default view: Displays one interaction per work request. Each journeyElement displayed in this view represents an individual interaction with the customer. Click on any icon to view the drill-down view of an interaction. <p>Drill-down view: Displays detailed information, including all status changes, for the selected journeyElement. All relevant data and links are presented in this view. The most recent information is displayed at the top of the vertical timeline.</p> <ul style="list-style-type: none"> • Topic view: Displays a filtered view of all journeyElements associated with the selected topic. • Account View: Displays a filtered view of all JourneyElements associated with the selected account.
	Video	Displays the video widget.







Table continues...

Icon	Name	Description
	Screenpop	<p>Displays the Screenpop widget.</p> <p>The Screenpop widget displays external web content that can help an agent to complete the customer interaction.</p> <p>If the external web content is sourced from non-secure sources, the content can be blocked from being displayed in Avaya Workspaces.</p> <p>! Important:</p> <p>To view content that is sourced from HTTP sources when accessing the client over HTTPS, you must configure your browser to accept non-secure content.</p> <p>To accept non-secure content in Chrome, click the icon to the right of the address bar.</p> <p>You can configure Screenpop for any interaction type.</p>
	Customer Search	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • Customer Search: Provides an option to search for customer details by surname, name, email, phone number, and social handle. • Customer History Search: Displays previous interactions with the customer with the date and time, status, priority, and channel of the customer request. You can search multiple parameters simultaneously. <p>* Note:</p> <p>The search parameters are connected by AND. Therefore, different combinations of same parameters display the same result. For example, the results for To Address and Date are the same as Date and To Address.</p>
	Dashboard & Reports	<p>Displays the Dashboards & Reports widget.</p> <p>This button is available only for supervisors.</p>
	My Agents	<p>Displays a list of agents in the supervisor's team and information about the agents' state and interactions.</p> <p>This button is available only for supervisors.</p>
	Observe	<p>Displays the interaction that you are observing.</p>
	End interaction	<p>Terminates agent's stuck interaction.</p>

Table continues...

Icon	Name	Description
	Avaya Workforce Engagement Select	Displays the Avaya Workforce Engagement Select widget with controls for recording, pausing, resuming, and playing back a call.
	Settings	Displays the Settings widget.
	Help	Provides help content about the Avaya Workspaces application.

Supervisor reporting dashboard icons





Icon	Name	Description
	Reporting Dashboard Viewer	Displays the Reporting Dashboard Viewer widget. Supervisor reporting dashboard users use this widget to view their reporting dashboards.
	Reporting View Manager	Displays the Reporting View Manager widget. Supervisor reporting dashboard users use this widget to manage their reporting views.
	Reporting Dashboard Manager	Displays the Reporting Dashboard Manager widget. Supervisor reporting dashboard users use this widget to manage their reporting dashboards.
	Reporting Calculated Measures	Displays the Calculated Measures widget. Supervisor reporting dashboard users use this widget to manage their calculated measures.
	Reporting Threshold Classes	Displays the Threshold Classes widget. Supervisor reporting dashboard users use this widget to manage their threshold classes.
	Open Reporting in new window	Opens a real-time reporting dashboard in a new browser window.

Text avatars

Avaya Workspaces displays text avatars next to the agent names. The avatar displays the first letter of the agent's first name and last name.

Avaya Workspaces text avatars support Latin characters only.

The following table lists some examples:

Agent's name	Text displayed in text avatar
Rose Bolton	 <p>The system displays the first letter of the agent's:</p> <ul style="list-style-type: none"> • first name • last name
1234	 <p>The system displays the default avatar.</p>
1Yury1	 <p>The system displays the first alphabetic character in the name.</p>
1Joe1 2Smith2	 <p>The system displays the first alphabetic character from the agent's:</p> <ul style="list-style-type: none"> • first name • last name

Widgets displayed for different interaction types

Avaya Workspaces displays different interaction widgets depending on the navigation menu item that you click. When you log in, the system displays the Team and Welcome widgets. The following table lists the default widgets displayed for each type of interaction:

Interaction type	Widgets displayed when you accept the interaction
Voice interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Co-Browse • Interaction Details • Screenpop • Customer History Search • Customer Search • Avaya Workforce Engagement Select recording

Table continues...

Interaction type	Widgets displayed when you accept the interaction
Video interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Interaction Details • Screenpop • Customer History Search • Customer Search • Avaya Workforce Engagement Select recording
Chat interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Co-Browse • Interaction Details • Customer History Search • Customer Search • Chat • Screenpop • Suggested Content
SMS interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Interaction Details • Customer History Search • Customer Search • SMS • Screenpop • Suggested Content

Table continues...

Interaction type	Widgets displayed when you accept the interaction
Email interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Interaction Details • Customer History Search • Customer Search • Email • Screenpop • Email template
Social interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Interaction Details • Customer History Search • Customer Search • Suggested content • Screenpop • Social
Generic Channel interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Interaction Details • Screenpop • Customer History Search • Customer Search

Table continues...

Interaction type	Widgets displayed when you accept the interaction
Messaging interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Customer Journey • Interaction Details • Customer History Search • Customer Search • Messaging • Screenpop <p>In addition to these widgets, a messaging interaction includes the Sample Library widget, which is not part of the standard layout and is shipped only as a sample widget. The Sample Library widget is only an example. Customers must create their own rich media content widget and host it as a third-party custom widget.</p>
Outbound interaction	<ul style="list-style-type: none"> • Customer details • Interaction details • Outbound scripts <p>In addition to these widgets, to view the outbound customer journey, the administrator must add customer journey widget.</p>

Exclusivity and interruptibility rules

When the administrator configures you for Exclusivity or Interruptibility, Avaya Workspaces sets restrictions on which channels you can work simultaneously. You can switch between channels depending on the configuration.

Exclusivity

When the administrator configures you for Exclusivity, you can only work on one channel at a time. In this mode, you can only switch channels in the following scenarios:

- When you finish your work and are idle across all channels. For example, if you have voice and chat channels and are currently working on a voice call, you can switch to chat when you end the voice call.
- When a service that you are eligible for on a different channel becomes overloaded. In this case, Avaya Workspaces makes you unavailable on the current active channel and switches to the overloaded channel when the current active channel becomes idle. For example, if you have voice and chat channels and are currently working on a voice call and chat becomes overloaded, Avaya Workspaces makes you unavailable on voice and you can start handling chats when you end the voice call.

Interruptibility

When the administrator configures you for Interruptibility, you can work on multiple channels at the same time according to the configured rules. In this mode, you can switch channels in the following scenarios:

- Depending on the configured rules. For example, you have two channels, voice and chat. Voice can interrupt chat but chat cannot interrupt voice. If you are currently active on chat, you can also accept voice calls. However, once you accept a voice call, you cannot accept chat.
- When a service that you are eligible for on a different channel becomes overloaded. For example, you have two channels, voice and chat. Voice can interrupt chat but chat cannot interrupt voice. If you are currently active on voice, you cannot accept chat. But, if chat gets overloaded, Avaya Workspaces makes you unavailable on voice and available on Chat when you end the voice call. To avoid you from switching back to voice again, Avaya Workspaces makes the voice channel unavailable while chat is overloaded, ensuring that you are on the overloaded channel.

Agent desktop notifications

Avaya Workspaces provides agent desktop notifications. When the administrator configures agent desktop notifications, Avaya Workspaces agent settings utilize the notification system of the browser to send notifications. Avaya Workspaces sends agent desktop notifications even when you are on a different tab or in a different application.

In addition to agent desktop notifications, Avaya Workspaces supports reserve channel notifications. When an administrator configures you with a reserve channel, Avaya Workspaces displays a toast message on the Agent desktop to notify that you are activated on a reserve channel due to service overload. Similarly, Avaya Workspaces displays a toast message on the Agent desktop to notify that you are no longer activated on a reserve channel.

Avaya Workspaces does not display which channels are reserved and which reserve channel is activated or deactivated.

Chapter 4: Operations

Logging in to Avaya Workspaces

About this task

Use this procedure to log in to Avaya Workspaces to handle customer interactions.

* Note:

If single sign-on (SSO) is enabled, the Activate Agent screen appears immediately when you access Avaya Workspaces.

Before you begin

1. Get the Avaya Workspaces URL from your supervisor.
2. Ensure that the administrator selects the **Prompt agent for extension number at login** check box in Avaya Control Manager while creating the user.

This step is not required for non-voice agents.

Procedure

1. Access Avaya Workspaces by using the URL that you received from your supervisor.

The URL is in the format: `https://CLUSTER-FQDN/services/UnifiedAgentController/workspaces/#/login`.

2. In the **Username** field, type your user name.
3. In the **Password** field, type your password.
4. Click **Sign in**.

Avaya Workspaces displays the Activate Agent screen.

5. In the **Profile** field, select the profile.
6. In the **Station ID** field, type the extension.

The **Station ID** field is enabled only if hotdesking is turned on. If hotdesking is not enabled for a user, then the user can see the station configured for voice, but the field is disabled. However, if the user has digital and outbound channels, **Station ID** is disabled. For an outbound agent, station login is mandatory.

7. Click **Activate**.

Avaya Workspaces displays a blank interaction area with a **Start Work** button, and the Team and Welcome widgets.

8. Click **Start Work**.

 **Note:**

If enabled by your administrator, on the interaction area you can click **Go Ready** to start work in the Ready state, or click **Go Not Ready** to start work in the Not Ready state.

This puts you in the Ready or Not Ready state for customer interactions. Avaya Workspaces queues interactions in the **Interaction** area.

Logging out of Avaya Workspaces

About this task

When you finish work, use the following procedure to log off from Avaya Workspaces.

Procedure

1. In the Agent toolbar, click your name.
2. From the drop-down list, click **Finish Work**.
3. In the Agent toolbar, click your name.
4. From the drop-down list, click **Exit**.

You are logged out from Avaya Workspaces, and the exit screen appears. If single sign-on (SSO) is enabled and you want to immediately log on to Avaya Workspaces again, click **Click here if you wish to return** to return to the Activate Agent screen.

Changing states

About this task

Avaya Workspaces displays the current agent states based on the availability of agents.

The options are dynamic and the availability of a set of options depends on your current agent state. For example, if you fail to answer an alerting interaction, Avaya Workspaces sends the interaction back to the queue for another agent to work on. The application also generates a toast notification to alert the agent who missed an alerting interaction. The application then changes the status to Not Ready. To return to the Ready state, you must select **Go Ready** from the Agent toolbar.

Procedure

1. In the Agent toolbar, click your name.

2. Click one of the following:

- **Start Work**
- **Additional Work**
- **Go Ready**
- **Go Not Ready**
- **Finish Work**

Changing the agent state after RONA

About this task

In Avaya Oceana[®], you can configure an agent to handle multiple interactions at the same time. When an agent working on an active interaction does not answer another incoming interaction for a specified time, the incoming interaction goes to Redirect On No Answer (RONA). The RONA controller makes the agent unavailable to receive further interactions. To start receiving interactions, the agent must manually change the state to Ready.

Procedure

1. In the Agent toolbar, click your name.
2. Click **Go Ready** to change the state to Ready.

Effect of different agent states on the Avaya Workspaces UI

Agent state selected	Changed visual cue	Agent status in Status bar
Start Work	Green	Ready
Additional Work	Blue	Additional Work Not Ready
Go Not Ready	Yellow	Reason Code Not Ready Pending Not Ready
Go Ready	Green	Ready Pending Ready
Finish Work	Grey	Logged Out
Not Ready Pending	Yellow	Not Ready Pending

Switching from one interaction card to another

About this task

When you receive multiple interactions simultaneously, you have to switch between interaction cards to communicate with different customers. Use the following procedure to switch from one interaction card to another.

Procedure

1. Click the header of the interaction card to which you need to switch.

Avaya Workspaces brings that interaction card into focus.

2. **(Optional)** When you have multiple interaction cards and the screen width does not allow you to view all cards simultaneously, from the carousel control available on the either side of the interaction card area, select the non-active interaction card to bring the interaction card into focus.

Making a call

Procedure

Do one of the following to make a call:

- In the **Enter phone number** field, type a phone number or contact name, and then click the Dial icon (📞).
- Click the Redial icon (↻) to dial the last dialed number.
- If you are active on an interaction click the **Customer Details** widget, click the customer phone number, and then click the Dial icon (📞).
- Click the Address Book icon (📖) and click the Dial icon (📞).

Accepting an inbound interaction



About this task

After you log in and start work, all incoming interactions are displayed as interaction cards in the interaction area.

Procedure

Depending on the type of inbound interaction, click one of the following icons:

- 📞: For an inbound voice call.
- ✓: For an inbound chat, email, SMS, or messaging interaction.

- : For a social interaction.
- : For a video interaction.

 **Important:**








You must have a connected microphone and camera to accept a video interaction. Otherwise, Avaya Workspaces displays an error.

Result

Depending on the type of interaction, the system displays different widgets to display the relevant information to complete the interaction.




Using a voice interaction card

Procedure

1. When a voice interaction is alerting, click the  icon to accept the interaction.
The system displays the Customer Details, Customer History Search, and Interaction Details widgets.
2. **(Optional)** To complete the customer interaction, you can use any of the following options from the navigation pane:
 - : To view information about the customer.
 - : To view the customer journey.
 - : To access an external website configured for a Screenpop.
The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:
 - opens a new browser window with the configured external website
 - brings the screenpop widget in focus
 - displays the screenpop widget and then opens any external screenpops that are configured
 - : To view previous interactions with the customer.
 - : To start a Co-Browse session. To initiate a Co-Browse session when on a voice call, click **Generate Co-Browse Key**. Agents then provide this key to their customers to start a Co-Browse session. When on a chat, they can click a Co-Browse URL.
 - : To view the Avaya Workforce Engagement Select widget for recording.

The Avaya Workforce Engagement Select button is available in the navigation pane for:

- all supervisors in any state
- for all agents but only in a Not Ready state with a reason code AWFOS

3. **(Optional)** To enter DTMF key inputs for IVR or voicemail, click the  icon.
4. **(Optional)** To put the interaction on hold, click the  icon. To unhold the interaction, click the icon again.
5. Click the  icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

6. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.



7. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

You can set disposition codes during the conference leg of the interaction, but cannot set them during the consult leg.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

8. **(Optional)** To view information about the interaction, click the  icon, and then **Interaction Details** menu.
9. Click the  icon to close the call.


Using Avaya Workforce Engagement Select

Before you begin

To use the controls on the Avaya Workforce Engagement Select widget, you must have the following options set in Avaya Control Manager:

- Enabled the AWFOS installed flag in Avaya Oceana®.
- Enabled the third-party widget flag.
- Entered the URL where the third party library is located.

Procedure

1. In the navigation pane, click the  icon.


The Avaya Workforce Engagement Select icon is available for supervisors in any state. For agents, the Avaya Workforce Engagement Select icon is available only in Not Ready state with a reason code AWFOS.

The system displays the AWFOS widget.

2. Use the buttons in the AWFOS widget to play, pause, cancel, or resume the recording.




Using a video interaction card

Procedure



1. When you get a video interaction card, click the  icon to accept the interaction.

The system displays the Video, Customer Details, Customer History Search, and Interaction Details widgets.

2. **(Optional)** To complete the customer interaction, you can use any of the following options from the navigation pane:

- : To view information about the customer.
- : To view the customer journey.
- : To access an external website configured for a Screenpop.

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:

- opens a new browser window with the configured external website
- brings the screenpop widget in focus
- displays the screenpop widget and then opens any external screenpops that are configured
- : To view previous interactions with the customer.
- : To view the Avaya Workforce Engagement Select widget for recording.

The Avaya Workforce Engagement Select button is available in the navigation pane for:

- all supervisors in any state
- for all agents but only in a Not Ready state with a reason code AWFOS

3. Click the  icon.

The system displays the Work Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction.

4. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

5. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition codes for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

You can set disposition codes during the conference leg of the interaction, but cannot set them during the consult leg.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

6. **(Optional)** To view information about the interaction, click the ... icon, and then **Interaction Details** menu.
7. Click the ✕ icon to close the interaction.

Using a chat interaction card

Procedure

1. When you get a chat interaction card, click the ✓ icon to accept the chat.

The system displays the Chat, Suggested Content, and Customer History Search widgets. The Chat widget displays the chat conversation with the customer.

Chat and Customer History Search widgets highlight customer, Chatbot, and agent messages in different colors, so that agents can easily differentiate between the messages. The widgets also display customer messages as left-aligned whereas Chatbot and agent messages as right-aligned.

2. In the **Type a message** field, type your chat message and click the ↵ icon or press the `Enter` key.

The Chat widget displays the message that you sent.

 **Note:**

If the customer sends a message and you do not respond within a configured time, Avaya Workspaces automatically sends a comfort message to the customer. The comfort message indicates that you are working on the customer's request.


If you manually scroll up in the chat interaction, and a new message arrives, the window does not automatically scroll to the bottom. Instead, the interaction shows a New Message indicator. You can then click the New Message indicator or use the scroll bar to move to the latest message received.

3. **(Optional)** To use a phrase from the Suggested Content widget in the chat, click the phrase.


The system sends the suggested phrase to the customer.

4. **(Optional)** To use a URL from the Suggested Content widget in the chat, click the URLs tab, and click the URL to add to the chat.






5. **(Optional)** To modify a suggested phrase, do the following:

- a. Click the  icon next to a suggested phrase.


The system displays the phrase in the **Type a message** field.


- b. Edit the phrase and click the  icon.

6. **(Optional)** To work with the customer interaction, you can click any of the following from the navigation pane:

- : To view information about the customer.
- : To view the customer journey.
- : To start a Co-Browse session. Click the icon and then, from the Co-Browse widget, click a Co-Browse URL.
- : To view previous interactions with the customer.
- : To access an external website configured for a Screenpop.

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:

- opens a new browser window with the configured external website
 - brings the screenpop widget in focus
 - displays the screenpop widget and then opens any external screenpops that are configured
- : To transfer interaction to an agent or service.

The file transfer button () is located on the input bar. You can transfer a single file at a time. The maximum size of files to be transferred must be below 2MB.

 **Note:**

The file-type limitations are configurable through Omnichannel Provider tool launched from Avaya Control Manager. A parameter is configured with a list of forbidden extensions. You can only add the file types that are not in the list.

Customers can download the attached files from the chat interaction only if the chat interaction is in progress and the file is linked to the customer's chat.

When the chat transcript is sent as an email to the customer, the files that the agent sent as attachments during the chat interaction are attached to the chat transcript email. Therefore, the total file size sent for one chat interaction must not exceed the email attachment size.

7. Click the ... icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

8. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

9. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

10. **(Optional)** To view information about the interaction, click the ... icon, and then **Interaction Details** menu.
11. Click the ✕ icon to close the digital contact.

Using the Co-Browse feature

About this task

With the Co-Browsing feature, the agent and customer can browse the same webpage simultaneously. This feature is available for chat and voice interactions, provided the customer has enabled Co-Browse on the web page and had obtained the session key.

Procedure

1. When you have an active chat interaction, in the navigation pane, click the  icon.

The system displays the Co-Browse widget.


2. Click one of the following to start a Co-Browse session with the customer:

- Co-Browse URL: Navigates to the URL.
- **generate co-browse key**: Activates the Co-Browse session on the existing web page.

Voice channel displays only the **generate co-browse key** option.



The customer gets a message indicating that a Co-Browse session is in progress with options to **Pause** or **Stop** the session.

You can now see the customer's screen and assist with the customer's query.

3. To request control of the Co-Browse session, click the  icon.

The customer gets a message to indicate that you requested control of the customer's web page. The customer gets options to **Grant** or **Deny** permission to access the customer's web page.

If the customer grants control, you can enter data in the customer's web page. During this time, customer gets an option to **Revoke** permissions if required. If the customer denies or revokes permissions for controlling the web page, you cannot control the customer's web page.

4. To release control of the Co-Browse session, click the  icon.
5. To end the Co-Browse session, click the  icon.


The customer gets a message indicating that the agent closed the Co-Browse session.

Using an SMS interaction card

Procedure

1. When you get an SMS interaction card, click the  icon to accept the SMS.

The system displays the SMS, Suggested Content, and Customer History Search widgets. The SMS widget has the conversation with the customer.

2. In the **Type a message** field, type your message and click the  icon or press the `Enter` key.


The message you sent is displayed in the SMS widget.

3. **(Optional)** To use a phrase from the Suggested Content widget, click the phrase.


The system sends the suggested phrase to the customer.

4. **(Optional)** To use a URL from the Suggested Content widget, click the URLs tab, and click the URL to send in the message.




5. **(Optional)** To modify a suggested phrase, do the following:

- a. Click the  icon next to a suggested phrase.

The system displays the phrase in the **Type a message** field.

- b. Edit the phrase and click the  icon or press the `Enter` key.

6. **(Optional)** To view Customer Journey of the customer, use any of the following options from the navigation pane:

- : To view information about the customer.
- : To view previous interactions with the customer.
- : To access an external website configured for a Screenpop.

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:

- opens a new browser window with the configured external website
- brings the screenpop widget in focus
- displays the screenpop widget and then opens any external screenpops that are configured

7. Click the **...** icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

8. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.


9. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

10. **(Optional)** To view information about the interaction, click the **...** icon, and then **Interaction Details** menu.

11. Click the  icon to close the digital contact.

Using an email interaction card

About this task

Use this procedure to use the email interaction card.

If your administrator has enforced dispositions codes configured in Avaya Control Manager, the **Send** button is disabled until you set the disposition code.

Procedure

1. When you get an email interaction card, to accept the interaction, click the ✓ icon.
The system displays the Email widget with the customer's email, and the Email Template Selector widget.
2. **(Optional)** From the list of templates on the Email Template Selector widget, click the plus sign (+) to add a template to the Email Compose window:
You can use the **Search templates** field to search for templates. When you hover over a template, the 🔍 icon also allows you to preview the template.
The system displays only those email templates and addresses contained in the data groups that are assigned to the agent in Avaya Control Manager.
3. **(Optional)** On the Email Template Selector widget, click the preview icon (👁️) to preview the template and click **Insert** to add the template to your email response or click **Cancel** to cancel the template selection.
4. Click **Reply** or **Reply All**.
The system displays the Compose Email and Email Templates widgets.
5. In the message body, type the response to the customer query.
6. **(Optional)** In the **To**, **Cc**, and **Bcc** fields, type additional email addresses to whom you want to send the email.
7. **(Optional)** Click **Attach Files** to add attachments.

After you attach a file, the system displays the name of the attached file in the **Uploaded attachments** section.

(Optional) Click the **X** icon next to the attached filename to delete the file.

Note:

The file-type limitations are configurable through Omnichannel Provider tool launched from Avaya Control Manager. A parameter is configured with a list of forbidden extensions. You can only add the file types that are not in the list.

8. **(Optional)** Click **Insert signature** to add a predefined email signature.




If you have not added any email signatures in **Settings**, this field is disabled.

If you have selected the **Automatically insert my signature in all emails** check box, the system automatically inserts the signature. For more information, see “Changing email signature settings”.

9. **(Optional)** To use a phrase from the Suggested Content widget, click the phrase.

The system adds the suggested phrase to the email.

10. **(Optional)** To view Customer Journey of the customer, use any of the following options from the navigation pane:

- : To view information about the customer.
- : To view previous interactions with the customer.
- : To access an external website configured for a Screenpop.

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:

- opens a new browser window with the configured external website
- brings the screenpop widget in focus
- displays the screenpop widget and then opens any external screenpops that are configured

11. Click the **...** icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

12. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

13. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

14. **(Optional)** To view information about the interaction, click the **...** icon, and then **Interaction Details** menu.


15. Click the **×** icon to close the digital contact.

Using a Social interaction card

About this task


On Social interaction cards, agents can see messages that customers send to a designated social media address.

Procedure

1. When you get a Social interaction card, click the  icon to accept the interaction.

The system displays the Social, Customer History Search, and Suggested Content widgets. The Social widget contains messages from the customer.

The header of the Social panel displays the source of the message and whether the message is public or private.

2. In the **Type a message** field, type your message and click the  icon or press the `Enter` key.


The Social widget displays the message that you sent.

3. **(Optional)** To use a phrase from the Suggested Content widget, click the phrase.


The system sends the suggested phrase to the customer.

4. **(Optional)** To use a URL from the Suggested Content widget, click the URLs tab, and click the URL to send in the message.




5. **(Optional)** To modify a suggested phrase, do the following:

- a. Click the  icon next to a suggested phrase.

The system displays the phrase in the **Type a message** field.

- b. Edit the phrase and click the  icon or press the `Enter` key.

6. **(Optional)** To view Customer Journey of the customer, use any of the following options from the navigation pane:

- : To view information about the customer.
- : To view previous interactions with the customer.
- : To access an external website configured for a Screenpop.

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:

- opens a new browser window with the configured external website
- brings the screenpop widget in focus
- displays the screenpop widget and then opens any external screenpops that are configured

7. Click the ... icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

8. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

9. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

10. **(Optional)** To view information about the interaction, click the ... icon, and then **Interaction Details** menu.
11. Click the ✕ icon to close the digital contact.

Using a Generic Channel interaction card

Procedure

1. When you get a Generic Channel interaction card, click the ✓ icon to accept the interaction.

The system displays the Customer Details, Customer History, Customer Journey, Interaction Details, and Customer History Search widgets.

2. To work on the interaction, you can use any of the following options from the navigation pane:
 - To view information about the customer
 - To view previous interactions with the customer
 - To access an external website configured for a Screenpop

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays the screenpops differently depending on the different settings configured in Avaya Control Manager. If the

administrator enabled the appropriate configuration in Avaya Control Manager, the screenpop feature does one of the following after the agent accept the interaction:

- Opens a new browser window with the configured external website
- Brings the screenpop widget in focus
- Displays the screenpop widget and opens any external screenpops that are configured

3. Click the ... icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

4. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

5. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

6. **(Optional)** To view information about the interaction, click the ... icon, and then **Interaction Details** menu.

7. Click the ✕ icon to close the digital contact.

Using a messaging interaction card

Procedure


1. When you get a messaging interaction card, click the ✓ icon to accept the messaging interaction.

The system displays Messaging and Customer History Search widgets. The Messaging widget displays the messaging conversation with the customer.


In addition to Messaging and Customer History Search widgets, a messaging interaction includes the Sample Library widget, which is not part of the standard layout and is shipped only as a sample widget. The Sample Library widget is only an example. Customers must create their own rich media content widget and host it as a third-party custom widget.

Messaging and Customer History Search widgets highlight customer, Chatbot, and agent messages in different colors, so that agents can easily differentiate between the

messages. The widgets also display customer messages as left-aligned whereas Chatbot and agent messages as right-aligned.

2. In the **Type a message** field, type your message and click the  icon or press the `Enter` key.

The Messaging widget displays the message that you sent.

3. **(Optional)** To use an emoji, click the  icon and select the required emoji from the emoji popup.
4. **(Optional)** To use a rich interactive message from the Sample Library widget, click the respective option.





You can send the following types of rich interactive messages:

- Text
- Text with emojis
- Images, GIFs, stickers
- Audio and video clips
- Location
- Carousel
- Location request

 **Note:**

Not all rich interactive message types are supported by all social messaging platforms.

5. **(Optional)** To work with the customer interaction, you can click any of the following from the navigation pane:

- : To view information about the customer.
- : To view the customer journey.
- : To view previous interactions with the customer.
- : To access an external website configured for a screenpop.

The system displays only those screenpops contained in the data groups that are assigned to the agent in Avaya Control Manager. The system displays screenpops differently depending on different settings configured in Avaya Control Manager. If the administrator has enabled the appropriate configuration in Avaya Control Manager, after accepting the interaction, the screenpop feature does one of the following:

- opens a new browser window with the configured external website
- brings the screenpop widget in focus
- displays the screenpop widget and then opens any external screenpops that are configured

- ⇄: To transfer interaction to an agent or service.

The file transfer button (📎) is located on the input bar. You can transfer a single file at a time. Clicking (📎) icon, you also get options to send audio and video recordings, which are specific to messaging channel only. The file-size limitations or file-type limitations are configurable in Avaya Control Manager. The maximum file size is configured by the administrator and can vary depending on the social messaging platform of the conversation.

6. Click the ... icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

7. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

8. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

Supervisors can set disposition codes on observe, coaching, or barge legs of interactions only when they are active on the interaction.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

9. **(Optional)** To view information about the interaction, click the ... icon, and then **Interaction Details** menu.
10. Click the ✕ icon to close the digital contact.

Using an outbound call routed through Proactive Outreach Manager

About this task

If Proactive Outreach Manager is configured for Avaya Workspaces, when you log in to Avaya Workspaces, Proactive Outreach Manager sends a nail-up call to your logged in station. When you answer the call, and go Ready on Avaya Workspaces, you begin receiving outbound work cards. Avaya Workspaces displays the Customer Details and Script widgets with information to help complete the call.

! **Important:**

In POM-Avaya Oceana® integration, Avaya Workspaces displays all Completion Codes configured in Avaya Control Manager.

Before you begin

Answer the nail-up call on the deskphone and go Ready on Avaya Workspaces.

Procedure

1. Answer the nail-up call on the deskphone.

2. Go Ready on Avaya Workspaces.

The system displays outbound work cards in the interaction area.

3. Click the ... icon.

The system displays the Work Codes and Disposition Codes menu and the Interaction details. The work codes are used to report the type of work done during the interaction. The Disposition Codes are used to report the outcome of the interaction.

4. Click the **Work Codes** menu, and click a work code.

The system displays only those work codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

5. Click the **Disposition Codes** menu, and click a disposition code.

You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Call Work time.

The system displays only those disposition codes contained in the data groups that are assigned to the agent in Avaya Control Manager. Based on the configuration set by your administrator, you might have to set a disposition code before ending an interaction.

6. Click the ✕ icon after you complete the call.

Viewing customer journey

About this task

The customer journey user interface provides summary of the recent data view for the work request. The journey displays all the accounts in tabs. The associated topics are automatically on display on the customer journey. You can view touchpoints in a condensed vertical timeline. The summary data view provides relevant transcripts and summary. There is an option to adjust the timeline range to view relevant account details.

You can filter in the Customer Journey widget on the horizontal timeline based on the time range from a dropdown field. Accounts are represented using graphical tabs within the widget. Topics are displayed as clickable text. On selection of a specific work request within the Customer Journey timeline, the drilled down view is redesigned. The information in the vertical timeline is replaced.

*** Note:**


For outbound channel, the customer journey widget is not present by default, and must be added.

A Summary panel displays the most recent interaction details for a work request. The Detail panel displays if there is a custom data, and you can expand to view them. The Links panel displays if links have been appended to a work request and you can expand the panel to view them.

A timeline panel displays a condensed view of the previous vertical timeline. The panel displays the touchpoints or statuses which a work request has transitioned through, along with the timestamp, the relevant agent ID, agent note and rating. For a relevant interaction with a status of ExperienceRated or Survey, rating is displayed as an emoji with the rating value available on hover. If the value is outside of the 0-11 range, only the value is displayed. If a transcript link is present for that work request, there is a button below the timeline for viewing the transcript.

The auto filter is available to open the relevant account tab by default. To enable the auto filter, set the **AutoFilter Customer Journey By** attribute in the CustomerJourneyService of the System Manager.



Procedure

1. After you accept an interaction, click  to view the customer journey.

By default, the customer journey displays all the accounts associated with that interaction.

Click  and  icons to scroll through the other accounts.

2. Click the required account tab to view the journey for that account.

You can view the topics associated with an account. Click  and  icons to scroll through the other topics.

Click an interaction to view Summary, Details, Links, and Transcripts.

3. On the customer journey, click **Show all** and select one of the following:

- **Last 7 days**
- **Last 15 days**
- **Last 30 days**
- **Last 60 days**
- **Show all**

The journey displays accounts and topics that belong to that time.

Terminating a stuck interaction

About this task

You can terminate a stuck interaction if you are an agent or a supervisor. When you end an interaction and if it fails to end, then the interaction gets stuck and you cannot remove it from the queue. You can terminate stuck interactions after a configured time out. To remove stuck

interactions, you must first configure the settings in UnifiedAgentController (UAC) service attribute in System Manager. Supervisors can remove stuck interactions for any agent who is visible on their supervisor reporting dashboard.


Before you begin


You can end an interaction only when you set **Enable Agents to clean up Stuck Contacts** attribute in the UAC service attribute to **True**. For more information about UAC service attribute, see *Deploying Avaya Oceana*[®].

Procedure

1. On an active interaction card, click the  icon to end an interaction.

The status of the interaction changes to **After Contact Work**.

If the interaction fails to end and it reaches a specified time out, the **Force end**  icon appears on the interaction card.

2. **(Optional)** If the interaction does not end after step 1, click the  icon to terminate the stuck interaction.

You can specify a time out until when you wait before removing the stuck interaction. This is configured in the **End Contact Time Out attribute** of the UAC service attribute. For more information about UAC service attribute, see *Deploying Avaya Oceana*[®].

Note:

For non-voice channels, click the  icon to terminate the stuck interaction.

Sending emails


About this task


Agents and supervisors can begin an outbound email interaction from Avaya Workspaces.

Avaya Workspaces includes an Email Template Selector widget. Using this widget, you can add an email template to an email.

If your administrator has enforced dispositions codes configured in Avaya Control Manager, the **Send** button is disabled until you set the disposition code.

Procedure

1. In the navigation menu, click the  email icon.
2. From the list of templates on the Email Template Selector widget, click the plus sign (+) to add a template to the Email Compose window.

You can use the **Search templates** field to search for templates. When you hover over a template, the  icon also allows you to preview the template.

The system displays only those email templates and addresses contained in the data groups that are assigned to the agent in Avaya Control Manager.

3. On the Email Template Selector widget, click the preview icon (👁) to preview the template and click **Insert** to add the template to your email response or click **Cancel** to cancel the template selection.
4. In the **To** field, type the email address to which you want to send the email.
5. In the **Cc** and **Bcc** fields, type additional email addresses.
6. Click **Attach Files** to add attachments.

After you attach a file, the system displays the name of the attached file in the **Uploaded attachments** section

Click the **X** icon next to the attached filename to delete the file.

7. In the message body, type the response to the customer query.

An inline image can be inserted in the message body if local images are uploaded to agent pool.

8. Click **Insert signature** to add a predefined email signature.

If you have not added any email signatures in **Settings**, this field is disabled.

If you have selected the **Automatically insert my signature in all emails** check box, the system automatically inserts the signature. For more information, see “Changing email signature settings”.


9. Click **Send**.

Inserting images in an email

About this task

Use this procedure to insert inline images in an email of an active email contact.

Procedure

1. In the navigation menu, click the  email icon.
2. In the message body, click the **Insert Image** icon.
3. In the Avaya Workspaces File Explorer window, do one of the following:
 - To use the existing images, select the check boxes of the images.
 - To upload new images, click **Upload new image**, browse and select the images, and then select the check boxes of the images.

Avaya Workspaces supports insertion of the images that are in .apng, .bmp, .gif, .ico, .jpeg .jpg, .png, .psd, .svg, .tif, .tiff, or .webp formats.

The maximum size of the image is 3 MB and the maximum size of an outbound email, including images and attachments, is 10 MB. In an email, an agent can have maximum five images at a time.

4. Click **Insert selected image** to add the selected images to the email.
5. **(Optional)** In the Avaya Workspaces File Explorer window, do the following to remove any existing images:
 - a. Select the check boxes of the images.
 - b. Click **Delete selected image**.


You can delete images if they are not inserted in the email body or signature. Otherwise, the **Delete selected image** button is disabled.

Replying to emails

About this task

You can reply to emails by using the email widget.

Procedure

1. In the navigation menu, click the  email icon.

Avaya Workspaces for Avaya Oceana[®] displays the email widget.

2. To respond to a customer email, click **Reply** or **Reply All**.
3. In the **To** field, the application populates the email address.

Supervisors or agents can manually enter the destination email address. Otherwise, as you type, Avaya Workspaces for Avaya Oceana[®] displays auto complete suggestions from your enterprise (LDAP) directory.

 **Note:**

Only those email addresses that you configured before displays in auto complete suggestions.

4. In the message body, do the following:
 - a. Type the message of the reply.
 - b. **(Optional)** To attach a file, click **Attach File**.
 - c. **(Optional)** To use an email template, select the required template from the Email Templates widget.
 - d. **(Optional)** To insert your signature, click **Insert Signature**.

Avaya Workspaces for Avaya Oceana[®] automatically adds the email signature to the message body if the **Automatically insert my signature in all emails** option is enabled earlier in the **Settings** widget.


5. Click **Send**.

Forwarding emails


About this task

Use this procedure to forward an email and its associated content to a user outside the contact center.

Procedure

1. In the navigation menu, click the  email icon.
2. In the email widget, click **Forward**.
3. In the **To** field, enter the email address.

Supervisors or agents can manually enter the destination email address. Otherwise, as you type, auto complete suggestions are displayed from your enterprise (LDAP) directory, if email address is configured.


4. In the message body, do the following:
 - To attach a new file, click **Attach File**.
 - To delete an attached file, click the  icon next to the attached filename.
 - To add a new message, type the message.
 - To use an email template, select the required template from the Email Templates widget.

The email signature is added to the message body if **Automatically insert my signature in all emails** option is enabled in the **Settings** widget.

5. Click **Send**.

Deferring an email

Procedure

1. In the email interaction card, click the Defer email icon (.
2. In the **Defer reason** field, select a reason.

The system displays only those defer reason codes contained in the data groups that are assigned to the agent in Avaya Control Manager.

3. In the **Delay for** field, select the period to defer the email or add a custom date and time.
4. Click **Defer**.

The system adds this interaction to the deferred interactions list in the agent toolbar and increases the counter by 1.

Extending the time of a deferred email

Procedure

1. Click the Deferred interactions icon (☐).
2. Click the Retrieve deferred email icon (☐) on the interaction you want to retrieve.
The system removes the interaction from the deferred list and displays as a work card.
3. To extend the timer, click the Defer email icon (☐).
4. In the **Defer reason** field, select the defer reason.
The system displays only those defer reason codes contained in the data groups that are assigned to the agent in Avaya Control Manager.
5. In the **Delay for** field, select the period to defer the email or add a custom date and time.
6. Click **Defer**.
The system adds this interaction to the deferred interactions list in the agent toolbar and increases the number on the counter.

Retrieving a deferred email

Procedure

1. Click the Deferred interactions icon (☐).
The system displays the deferred interactions.
2. Click the Retrieve deferred email icon (☐) on the interaction you want to retrieve.
The system removes the interaction from the deferred list and displays it as a work card.
You can also retrieve draft email.
If a deferred interaction has not been manually retrieved before the selected **delay for** time has expired, it is re-presented to the agent. If this agent is unavailable, the deferred email is routed to the appropriate service.
For administration of defer email limits, see Avaya Control Manager documentation.

Approving email replies from agents to customers

About this task

Customers contact the business by sending emails to the email addresses published by the business. The email responses from agents go through an approval process for quality assurance. A designated approver can approve or reject emails based on the review parameters.

Before you begin

An agent sends an outbound email as a reply to the customer's email. The approver receives a work card notification for email review and verification.

Procedure

1. Click the Accept icon (✓) to accept the contact.

The application displays the email details.

2. Click **Review**.

Important:

- If the approver or agent receives an email with attachments, all the attachments are applied while clicking **Review**.
- Approver can see an indication about the number of times the email was rejected earlier.

3. After review, to approve the email, do the following:

- a. If required, edit the email text.

Note:

If the approver edits the email text and then approves the email, the agent does not receive any feedback on the changes made.

- b. In the **Decision** area, select the **Approve** option.

Click **Approve**.

The email is sent to the intended destination.

4. To reject the email, do the following:

- a. In the **Decision** area, select the **Reject** option.
- b. From the **Choose a rejection code** drop-down, select an appropriate rejection code.
- c. Add your review comments to the email.
- d. Click **Reject**.

The email is routed back to the agent. The agent receives the rejection email with the reason for rejection and the approver's comments. The agent can choose to reply or close the email without sending a response to the customer. If the agent replies, the email is routed back to the approver for review and approval or rejection.

Reworking rejected email

About this task

Email rejected by the approver is routed back to the agent. The agent receives a work card notification for the rejected email with the reason for rejection and the approver's comments.

Procedure

1. Click the Accept icon (✓) to accept the contact.

The application displays the email rejection details and the comments from the approver.

2. To reply to the email, do the following:

- a. Click **Reply**.
- b. Edit the email text as per the comments received from the approver.
- c. Click **Send**.

The application routes the mail to the approver. See [Approving email replies from agents to customers](#) on page 56. The email loops around in the system until it is either approved or the interaction is closed.

3. For those emails where the comment from the approver suggests that the email is not to be sent to the customer, do the following:

- a. Read the reviewer's comments and suggestions.
- b. Click **Close Interaction**.

Important:

If the approver, while approving or rejecting an email, clicks ✕ icon on the work card, on confirming the **End Interaction** prompt, the email is re-queued. If the agent is working on a rejected email and clicks ✕ icon on the work card, on confirming the **End Interaction** prompt, the email is removed from their desktop and re-queued. If that agent is still logged-in, the email can present again to the agent.

Transferring an interaction to a service

About this task

Use this procedure to transfer an interaction to another agent to provide improved customer service.

Note:

The Salesforce menu appears only if you are connected to Salesforce. The Enterprise Directory menu is disabled if address book integration with LDAP is not configured.

Procedure

1. On the interaction card, click the ⇄ icon.
2. To transfer a voice interaction to another agent, do one of the following:
 - In the **Enter Extension** field, type the extension to which you want to transfer the voice interaction and click the 📞 icon.

- In the **Team**, **Enterprise Directory**, or **Salesforce** menu, search for and click the name of the agent to whom you want to transfer the voice interaction.

The system indicates the supervisor for the team at the beginning of the team list.

 **Note:**

The search menu returns a maximum of 10 results. If your search return more than 10 matches, refine your search for a better match. The search list only returns contacts that have at least 1 phone number.

3. To transfer any interaction to a service, click the service to which you want to transfer the interaction.

You can use the transfer to service feature when you determine that:

- The interaction came to you in error.
- You cannot help the customer and the interaction must be sent to a service that is better equipped to address the interaction.

The system displays only those transfer services contained in the data groups that are assigned to the agent in Avaya Control Manager.

Transfer to a service is a single-step transfer. After you click the service to which you want to transfer, you are dropped from the interaction. The customer hears a wait tone until an agent from the service accepts the interaction.

Avaya Workspaces supports the transfer to service feature for Voice, Chat, Email, SMS, Web Voice, Social Media, Video, Generic, and Messaging channels.

Result

Avaya Workspaces transfers the interaction to the default number of the agent provided, and clears the interaction from the interaction area.

Transferring an interaction to a user

About this task

The **Transfer to user** option allows an agent or supervisor to transfer digital contacts such as email, chat, SMS, social, generic, voice, or messaging contacts to another agent or a supervisor in a single-step transfer. For chat, voice, and messaging contacts, the target user must be currently online. For email, SMS, social, and generic contacts, the target users can be either offline or online. Avaya Control Manager administrators assign **Transfer to user** permissions to agents and supervisors. The Customer Journey records information about agents or supervisors who routed the contact.

Procedure

1. On the email, chat, or voice interaction card, click the ⇄ icon.

2. In the **Users** menu, search for and click the name of the agent to whom you want to transfer the interaction.

You must enter a minimum of 2 characters to click the search icon and trigger a search. However, you must enter a minimum of 3 characters to display the search result. The search list contains agents or supervisors configured with the same contact channel as that of the incoming contact. The list displays agents or supervisors based on their activity status for a specific media type.

 **Note:**

The search menu returns a maximum of 10 results. If your search return more than 10 matches, refine your search for a better match.

The agents or supervisors cannot change the To, CC, Bcc, Subject, message, attachments of an email when they initiate transfer and even after the transfer is complete.

The transfer of user for a voice contact supports both PSTN and Web voice channels.

When an agent or supervisor working on an active interaction does not answer the transferred interaction for a specified time, the interaction goes to Redirect On No Answer (RONA). After the time out, the contact is routed to the original service and is given highest priority. You can find an agent or supervisor with similar match sharing the original service attributes. The originating agent or supervisor can select this service while transferring the contact.

After the transfer is complete, the target agent or supervisor is in ACW, AUX, or Ready state as set by contact center operations.

Next steps

The target user receives the interaction as a regular interaction. After accepting the interaction, the user can work on that. The user can also transfer the interaction to another user.

Adding another agent to an interaction

About this task

Use this procedure to add another agent to the interaction.

Avaya Workspaces allows a user to place a customer interaction on hold while they consult with another consulted agent. After consulting with the required agent, the user can choose to drop the consult call and resume the main conversation with the customer. The user can also choose to complete the consult as a conference. The user can end the consult call initiating a three-way conference so that the customer, consulted agent, and user are placed in conversation.

 **Note:**

The Salesforce menu appears only if you are connected to Salesforce. The Enterprise Directory menu is disabled if address book integration with LDAP is not configured.

Procedure

1. In a voice interaction card, click the Consult icon (👤).
2. Do one of the following:
 - In the **Enter Extension** field, type the extension to which you want to transfer the voice interaction or consult with other agent and click the Dial icon (📞).
 - To consult another agent, in the **Services**, select a service you want to consult with.
 - In the **Team, Enterprise Directory, or Salesforce** menu, search for and click the name of the agent to whom you want to transfer the voice interaction or consult with other agent.

*** Note:**

The search menu returns a maximum of 10 results. If your search return more than 10 matches, refine your search for a better match. The search list only returns contacts that have at least 1 phone number.

Avaya Workspaces makes an outbound voice call to the extension you provide.

Avaya Workspaces displays a new interaction card joined to the existing interaction card with options to resume, hold, transfer, or start a conference call.

3. Click one of the following:
 - Hold icon (⏸): To resume the interaction that was on hold.
 - Complete as Conference (👤): To complete the consult call as conference.

As the conference connects, the main interaction card connects to the call with the customer while the consult interaction card momentarily greys out and then drops. The consulting agent is in a three way conference call with the consulted agent and the customer. The main interaction card title displays as Conference to indicate that the call is in conference.

*** Note:**

The Complete as Conference does not support completing consult to service as a conference of Web Voice or WebRTC calls. However, Complete as Conference is limited to PSTN voice calls. While both the consulting agent and consulted agent are in conference with the customer, they are restricted from carrying out further consults through services. The consulting agent cannot complete as conference until the consult call starts alerting at the consulted agent.

- Complete as Transfer (↔): To transfer the call to the agent with whom you consulted.

Calling your supervisor

About this task

Use this procedure to call your supervisor to consult about a customer. Avaya Workspaces uses the supervisor number configured in Avaya Control Manager. To create a conference call, you must add the supervisor to the interaction by using the steps to add another agent to an interaction.

You can also use the Request Supervisor feature that requests the supervisor through the supervisor Agent ID and not the phone extension. You can use this feature only when the supervisor is in the **Ready** state.

Before you begin

1. Place the customer on hold by clicking the **Hold** icon.

Avaya Workspaces displays an error if you fail to do this.

Procedure

On the Agent toolbar, click the Supervisor icon (👤↑).

Avaya Workspaces makes an outbound voice call to the supervisor, and the supervisor is alerted.

Timed After Contact Work

Use this feature to record the time spent on activities that are done after the interaction ends. For example, adding notes or dispositions to the interaction.

To use this feature, the administrator must configure a global Timed After Contact Work time in Avaya Control Manager.

After the interaction ends, the agents enter the After Contact Work state for a predefined interval. The smallest predefined interval is one second.

Using Timed After Contact Work

About this task


! Important:

You cannot log After Contact Work time for consult, coaching, or barge-in calls.


Procedure

In the After Contact Work state, click one of the following:

-  To close the After Contact Work card.

If required, you can close the After Contact Work state immediately. If you do not click the  icon, the system moves out of the After Contact Work state only after the predefined After Contact Work time expires.

- : To extend the After Contact Work time.

When you click the  icon, Avaya Workspaces extends the After Contact Work state indefinitely.

Recording additional work

About this task

Use the following procedure to record time for activities related to a customer interaction that must be completed outside the Avaya Workspaces.

Procedure



1. In the Agent toolbar, click your name.
2. Click **Additional Work**.
The visual cue changes to blue, and the state in the task pane changes to **Not Ready**.
3. Complete the additional work associated with the last active interaction.
4. Click your name in the toolbar, and click **Go Ready** to resume work.

Searching a customer

About this task

In Avaya Workspaces for Avaya Oceana[®], you can get details of a customer by searching the customer through the Customer Search widget. On the Customer Search widget, you can search a customer by surname, name, email, phone number, and social handle.

Procedure

1. Do one of the following:
 - a. Click the Customer Information icon ().
Avaya Workspaces displays the Customer Details and the Customer History widgets.
 - b. Click the  icon.
Avaya Workspaces displays the Customer Search and the Customer History Search widgets.
2. On the Customer Search widget, click the search criteria based on which you want to search the customer.

Avaya Workspaces displays the input fields based of the selected criteria.

3. Enter your inputs in the fields and click **Search**.

Avaya Workspaces displays the search results.

4. In the Results area, click the  icon next to the customer name.

Avaya Workspaces displays the Customer History Search widget with the history records of the customer.

5. **(Optional)** To view all history records of the customer, click **Show full history**.


Searching customer history

About this task


You can search customer history to find information about previous interactions with the customer.

Procedure

1. Do one of the following:

- a. Click the Customer Information icon ().

Avaya Workspaces for Avaya Oceana® displays the Customer Details and the Customer History widgets.

- b. Click the  icon.

Avaya Workspaces displays the Customer Search and the Customer History Search widgets.

2. Expand the **Search by** drop-down list and select one of the following options:

- **Date**
- **Customer Email**
- **Subject**
- **To address**

Depending on your selection, the Customer History Search pane displays a calendar where you can select a date or a field to enter the customer email, subject, or to address.

3. Specify the search criteria and click **Search**.

The Customer History Search pane displays the details of the customer interaction that match the search criteria that you provided.

You can view the transcripts of conversations by expanding the results where available.

Supervisors or agents can view the images that are inserted in emails of active email contacts.

*** Note:**

- For a long list of search results, use **Page** and **Rows per page** drop-downs and the scrolling arrows to scroll through the results. You can also see number of records in the **Records** area, at the bottom of **Customer History Search** page.
- If the search criteria displays no Customer History, the application displays `No Results Found`.

4. **(Optional)** To add multiple search parameters, click **Add more search parameters** and repeat steps 2 and 3.

You cannot search more than 4 parameters. When you reach the limit, the Customer History Search pane displays the following message: `You've reached the limit of search parameters`.

5. **(Optional)** To delete unwanted search parameters, leave the respective input fields empty and click **Search**.

The empty search fields get removed from the Customer History Search pane.

Using the address book

About this task

This procedure describes the tasks you can perform using the Avaya Workspaces address book, such as searching for a contact, viewing an enterprise contact's profile, or using click to call.

The address book tab separates your Team contacts from your Enterprise Directory (LDAP) contacts. If you connect to Salesforce, the Salesforce tab appears on the address book.

*** Note:**

The address book closes automatically when an incoming interaction arrives.

Before you begin

- Ensure that your administrator has configured the address book integration with LDAP, if required.
- Connect to Salesforce using Avaya Workspaces settings, if required.

Procedure

1. On the Agent toolbar, click the Address Book icon (.



The Address Book opens.

2. To search for a contact on either the **Address Book** or **Salesforce** tab, in the **Search contacts** field, type the search text. You can search for a contact by first name, last name, and display name, home phone number and work phone number, department, city, or email address.


 **Important:**

Avaya Workspaces supports the use of apostrophe (') in the username, first name, last name, and the display name of a user.

The results appear in the results list. The address book can return a maximum of 25 results. If your search returns more than 25 results, Avaya Workspaces prompts you to refine your search.

3. To view the profile of a contact, click on the contact's name from the results list.
4. If you click on a phone number associated with the profile, you can choose to dial the number immediately, add the number to the **Enter phone number** field, or copy the number to the clipboard.
5. Click **Back** to return to the **Address Book** tab.
6. To click to call for an address book contact, click the Dial icon () that appears beside a contact in the address book list. If you hover over the Dial icon (), Avaya Workspaces displays the number to call.

 **Note:**

The Dial icon () appears only if you have voice capabilities, and the contact has an associated phone number.

7. To collapse or expand the Team or Enterprise Directory headers, click the arrow icon.

Viewing desktop notifications

About this task

When the Avaya Workspaces browser of the agent is not in focus or is minimized and the agent receives a new chat, email, SMS, social, or messaging interaction, the system displays a toast notification.

Procedure

When the system displays the toast notification, click the notification window to bring Avaya Workspaces into focus.

Google Chrome does not support notification without HTTPS. You must allow notification in the browser.

Keyboard shortcuts

Shortcut key	Description
Ctrl+Shift+/,	Show or hide the list of shortcut keys.
Ctrl+Alt+,	Open Settings page.
Ctrl+Alt+.	Open Help page.
Ctrl+Alt+k	Start Work and Go Ready.
Ctrl+Shift+k	Start Work and Go Not Ready.
Ctrl+Alt+l	Finish work.
Ctrl+Alt+o	Go Ready.
Ctrl+Alt+p	Go Not Ready.
Ctrl+Alt+j	Additional Work.
Ctrl+Alt+x	Exit or sign out.
Ctrl followed by i	Open Deferred Interaction List
Ctrl followed by a	Accept an interaction.
Ctrl followed by x	Close an interaction.
Ctrl+Shift+h	Hold or unhold interaction.
Ctrl followed by h	Toggle consult hold.
Ctrl followed by t	Blind transfer interaction.
Ctrl+Shift+m	Display the menu for more options from the interaction card.
Ctrl followed by d	Display the menu for dial pad from the interaction card.
Ctrl followed by c	Display the menu for consult from the interaction card.
Ctrl followed by g	Complete the consultation as a conference.
Ctrl followed by e	Extend ACW.
Ctrl followed by z	Complete ACW.
Ctrl+Alt+s	After Contact Work (for Elite).
Ctrl followed by o	Start coaching agent.
Ctrl followed by b	Begin barge-in.
Ctrl followed by u	Defer an email.
Widget area shortcuts	
Alt+Up arrow key	Select the previous widget.
Alt+Down arrow key	Select the next widget.
Sidebar area shortcuts	
Ctrl followed by w	Select the previous item on the left sidebar.
Ctrl followed by s	Select the next item on the left sidebar.
Workcard selection	

Table continues...

Shortcut key	Description
Ctrl followed by .	Select the next interaction card that can be focused.
Ctrl followed by ,	Select the previous interaction card that can be focused.

Important:

- Avaya Workplace Client and Avaya Workspaces support keyboard shortcuts and use identical controls in both products. When you use Avaya Workplace Client and Avaya Workspaces on the same desktop client, there are shortcut conflicts where the same short cut affects both clients. If you do not want this behavior, Avaya recommends to turn-off Avaya Workplace Client shortcut(s) and only use Avaya Workspaces shortcuts at the client application for handling Oceana[®] routed, and non-Oceana[®] routed voice contacts.
- For all **Ctrl followed by** shortcuts, you must release the **Ctrl** key before you press the next key.

Supervisor features


Viewing agents in a team

About this task

Use this procedure to view the list of agents in Avaya Workspaces with a single click. Note that only supervisors can do this task.

When you are searching or filtering through large number of agents, Avaya Workspaces can take up to five seconds to load the table. During this time, agents can expect a decrease in performance of the dashboard.

Procedure

1. In the navigation pane, click the My Agents icon (.

Avaya Workspaces displays the list of agents in the team with the Agent ID, Station ID, groups, available channels, and current status.

The color of the avatar reflects the agent state.

2. In the **Search** field, type a search query by using one of the following:

- **Name**
- **ID**

3. Click the required values in the following fields:

- **channel**

- **state**
- **groups**

For example, to search for all voice agents in a ready state, in the **channel** field, select **Voice** and in the **state** field, click **Ready**.

4. Click the arrow sign (>) to expand the agent row to see the interactions that the agent is currently working on.

You can expand maximum five agents.

Avaya Workspaces displays the list of interactions with the following details:

- Service name
- Direction
- Target
- Media type
- Duration
- State
- Work code
- Disposition code

Observing an interaction

About this task

Supervisors can monitor ongoing interactions between an agent and a customer to assess whether intervention is required.

This feature is available only for chat, SMS, and messaging interactions. Supervisors can observe agents, but agents cannot observe other agents.

If the agent who is being observed transfers the interaction, the system ends the observe session.

Procedure

1. Click the My agent icon (☰).

The system lists the agents in the team with their status.

2. To find an agent, do one of the following:
 - Scroll through the list of agents.
 - Type the name of the agent in the search field, and click the Search icon (🔍).
 - Select appropriate values in the **Extension**, **Channel**, or **Status** fields.
3. In the row with the agent name, click the Observe icon (👁).

You can now see the agent web chat or SMS with the customer, but you cannot send messages to the customer or the agent while observing.

The system displays an interaction card with options to stop observing or start coaching the agent.

If a supervisor has three active chat, SMS, or messaging interactions, the supervisor can view more interactions by observing other agent's interactions. For each channel, a supervisor can observe a maximum of three interactions.

When Avaya Workspaces adds you to the web chat session as an observer, the sample WebChat client notifies the customer that an additional party was added to the chat and the console displays the Supervisor's login name. The sample WebChat client also notifies the customer when the Supervisor stops observing the web chat session.

Coaching an agent

About this task

Use the following procedure to provide expert advice to help an agent address a customer request.

The system notifies the agent that you are coaching the agent.

Before you begin

Ensure that you are observing the interaction for which you want to coach the agent.

Procedure

1. On the interaction card, click the Coach icon (🗨️).

The system displays a coaching section in the webchat, where you can send messages to the agent.

2. In the **Web Chat** widget, click the **Coaching** tab.

3. In the **Enter message** field, type your message for the agent, and click the Send icon (➤).

Only the agent can see the messages that you send in the coaching section.

Barging into an interaction

About this task

You can barge into an interaction to:

- Provide expert advice to agents when they are unable to handle the interaction.
- Close a sale.

When you barge in, the agent cannot send messages to the customer, transfer files in the coaching chatroom, or close the interaction.

The system notifies the agent that you have barged into the interaction.

Before you begin


Begin coaching the agent on the interaction to barge in. You cannot barge in without first coaching the agent.

Procedure


1. Click the Barge in icon (.

You now have full control over the interaction.


2. Do one of the following:

- If you addressed the customer request, click the Close icon (.

The system closes the interaction card.

- If you determine that another agent can handle the customer request, click the Transfer icon (.

The system transfers the interaction card.

3. On the After Contact Work card, provide the appropriate information.
4. Click the  icon to close the After Contact Work card.

Changing agent state

About this task

Use this procedure to change the state of an agent in the team. Note that only a supervisor can do this task.


For example, an agent can leave or take a break while logged in to Avaya Workspaces. You can change that agent state to **Not Ready** or **Logged out** to prevent calls from being routed to the agent.

If you change the state of an agent who is active on an interaction, the agent is moved to a Pending state. When the agent closes the interaction, the agent moves to the state that you have set.

Before you begin

Ensure that the administrator grants the correct permissions in Avaya Control Manager so that you can change the agent state.

Procedure

1. In the navigation pane, click the My Agents icon (.
2. Locate the agent whose state you want to change.
3. Click the **Status** field next to the agent name.
4. Select the state to which the agent must be changed.

Avaya Workspaces displays the changed state and sends the agent a notification about the changed state.

Broadcasting a message to agents

About this task

Use this procedure to broadcast a message to agents in Avaya Workspaces. The application displays this message as a toast notification.

Note that only supervisors can do this task.

Procedure

1. In the navigation pane, click the My Agents icon (☰).
Avaya Workspaces displays the list of agents in the team with the current agent status.
2. Click the Broadcast icon (📢).
Avaya Workspaces displays the Broadcast panel.
3. Type a message, and click **Send**.
Avaya Workspaces displays this message as a toast to all targeted agents.
4. **(Optional)** To broadcast messages to specific agents, use the filters.
For example, you can select **Status** as **Ready** to view all Ready agents. If you then sent a broadcast message, Avaya Workspaces sends the message only to Ready Agents.
When you send a broadcast message, Avaya Workspaces sends the message to you too. You receive your own broadcast messages.

Viewing the list of deferred emails

About this task

Supervisors can view the list of deferred interactions by agents in the team.

Procedure

1. In the navigation pane, click the My Agents icon (☰).
2. Click the My agent tab and expand the agent to view the active and deferred interactions for the agent.
3. You can view the following information:
 - **Service Name**
 - **Direction**
 - **Target**
 - **Media Type**
 - **Duration**

- **State**
- **Work Code**
- **Disposition Code**

Retrieving a deferred email

About this task

The supervisor can retrieve the email, complete the email and send it to the customer.

Procedure

1. In the navigation pane, click the My Agents icon (☰).
2. Click the My agent tab and expand the agent to view the active and deferred interactions for the agent.
3. Click the Retrieve deferred email icon (↶) on the interaction you want to retrieve.

Avaya Workspaces removes the interaction from the deferred list and displays it as a work card for the supervisor.

Transferring the deferred email to service

About this task

If the agent is unavailable and the defer email timer is about to expire, the supervisor can transfer the interaction to service.

Before you begin

Ensure that the administrator has customized the list of transfer to service list.

Procedure

1. In the navigation pane, click the My Agents icon (☰).
2. Click the My agent tab and expand the agent to view the active and deferred interactions for the agent.
3. Click the Retrieve deferred email icon (↶) on the interaction you want to retrieve.

Avaya Workspaces removes the interaction from the deferred list and displays it as a work card for the supervisor.

4. Click the Transfer icon (↷) and click **Services**.
5. Select the appropriate service.

The deferred email is no longer displayed in the Deferred interactions.

Limitations of a supervisor dashboard

- Only one supervisor can observe, coach, or barge in on a contact. After a contact is in an observed state and another supervisor tries to observe, the other supervisor can only see the observed icon, but cannot observe.
- If two supervisors try to observe at the same time, the chat provider only enables one supervisor to observe.
- An agent does not have access to any information about who is observing the interaction when:
 - A supervisor is viewing the agents and groups on the supervisor dashboard.
 - One of the agents is currently being observed by another supervisor.
- If a supervisor is assigned to a virtual group and the group is assigned to another supervisor, the first supervisor cannot use the **Call supervisor** button from the toolbar. The system does not display this button because the first supervisor is not tied to the second supervisor. The first supervisor is only in the group of the second supervisor. The system displays the **Call supervisor** button for agents who are in a supervisor team, not just in their group.
- The team viewer of a supervisor displays all members of the supervisor's team and groups. The team viewer of an agent only displays the agent's team.
- An agent is not informed of the groups to which the agent is assigned.
- An agent does not know which members are in the group. This information is only available to the supervisor.
- This limitation is for supervisors with After Call Work configured. If a supervisor is working on a web chat and transfers the web chat to another agent, the supervisor goes into After Call Work and the work card is retained. However, if they now go to their Supervisor Dashboard and find the agent who has that same web chat to observe the agent, they must first end the After Call Work card.

Chapter 5: Real-time reporting

In an Avaya Oceana[®], the supervisor reporting dashboard provides real-time reporting capabilities. Using Avaya Workspaces, users can view real-time reporting dashboards to monitor up-to-date statistics for your contact center and resources. You can also view changes in call activity in real time. Avaya Analytics[™] provides real-time data for your dashboards. This chapter describes how to use the supervisor reporting dashboard in Avaya Workspaces to view and manage dashboards, views, and widgets.

You must use a minimum screen resolution of 1920 x 1080 when using the supervisor reporting dashboard.

Note:

This chapter does not describe each producer and measure available for use in real-time reporting dashboards in detail. For more information about Avaya Analytics[™] producers and measures, see *Avaya Analytics[™] Data Dictionary*.

Dashboards

A dashboard is a collection of one or more real-time data views. A view consists of a reporting widget, and a widget is an individual report control type. The supervisor reporting dashboard supports the following widgets:

- Bar chart
- Pie chart
- Column chart
- Billboard
- Table

The supervisor reporting dashboard provides a number of default dashboards that all users can open. The default dashboards, along with the views that they contain, are:

- Agent Performance
 - Agent Status tabular display
 - Agent Behaviour tabular display

Note:

By default, the reporting dashboard in this version of Avaya Workspaces does not display the Account Performance Summary view and Account Performance view. If you had these views in a previous version of Avaya Workspaces, then you must export your Account

Performance Summary view and Account Performance view before upgrading Avaya Workspaces and import back after upgrade to this version is complete.

- Contact Summary
 - Contacts Waiting in Queue Billboard
 - Contacts Abandoned from Queue Billboard
 - Contacts Offered Billboard
 - Contacts Answered Billboard
 - Contacts at Agents Billboard
 - Contacts Transferred to Service Billboard
 - Contacts Transferred to Agent Billboard
 - Contacts Consults Billboard
 - Contacts Holds Billboard
 - Contacts Deferred Billboard
 - Contacts Conference Billboard
 - Contacts Completed Billboard

*** Note:**

By default, the reporting dashboard in this version of Avaya Workspaces does not display the Agent Behaviour Summary Bar Chart. If you had this view in a previous version of Avaya Workspaces, then you must export your Agent Behaviour Summary Bar Chart before upgrading Avaya Workspaces and import back after upgrade to this version is complete.

- Routing Performance Summary
 - Service Distribution tabular display

*** Note:**

By default, the reporting dashboard in this version of Avaya Workspaces does not display the Service Performance tabular view. If you had this view in a previous version of Avaya Workspaces, then you must export your Service Performance tabular view before upgrading Avaya Workspaces and import back after upgrade to this version is complete.

*** Note:**

You cannot modify default dashboards. All users can clone these dashboards. You can hide default dashboards using the Hide Dashboard option of the Dashboard Manager.

Users can create, modify, delete, and view dashboards depending on the role type of the user.

You can create new dashboards using the supervisor reporting dashboard. Administrators can create dashboards that are public and available to all users. Supervisors can create private dashboards, visible only to the supervisor user that creates them. Users have the ability to export a dashboard, which administrator users can then import them for public use. All users can also make a clone of an existing default or public dashboard. Cloned dashboards are private. You can create a maximum of 6 private dashboards and 6 public dashboards.

The reporting external window is dependent on the data delivered in Avaya Workspaces. For the data in a given dashboard to be displayed in the external window, you must select the corresponding dashboard in Avaya Workspaces. Once the dashboard is selected, the data in both external and internal windows is updated and displayed in sync.

Views and measures

To create views, Avaya Workspaces uses producers provided by Avaya Analytics™. Avaya Analytics™ provides a list of measures that are available for use in each view. You can add multiple measures to Bar chart, Pie chart, Column chart, and Table views. Billboard views support a single measure only.

You can create calculated measures, which you can use to make compound calculations based on standard Avaya Analytics™ measures. The values for these calculated measures are sent by Avaya Analytics™ for use in views. For example, you can create a calculated measure that calculates the percentage value of offered calls not answered by agents.

By default, all new calculated measures are private and visible only to the user who creates them. If an administrator creates a new calculated measure, the calculated measure is public.

You can create a new calculated measure using the following ways:

- Standard: Create a standard measure using mathematical functions.
- Conditional: Create a conditional measure using logical operators.

For more information about Avaya Analytics™ producers and measures, see *Avaya Analytics™ Data Dictionary*.

When you create a new dashboard, you can select the views that the dashboard displays. You can add views to a dashboard using a number of default layouts. A layout defines the position of each view on the dashboard. You can arrange views vertically, horizontally, or a combination of both.

You can create new views by using one of the supported widgets. For example, create a new Pie chart view using the Pie chart widget. Select the producer to be associated with the view, and then select the measures to be displayed on the view. You can also change the order of the measures and apply formatting changes. You can create an unlimited number of views.

Administrators can create views that are public and available to all users. Supervisors can create private views, visible only to the supervisor user that creates them. You can clone an existing private, or public view. If an administrator clones a view, it is public. Otherwise, cloned views are private.

When you create a view, you must specify the viewing mode for the real-time producers. The options are:

- Start of Day: View measures accumulated since the start of the current day.
- Contact Detail Records: View measures relating to individual contacts. These measures are not bounded by any interval timeframes such as Start of Day.

You can create views to support a single instance or multiple instances of data. If you select single instance the measures displayed on the view relate to a single data dimension only, for example an Agent or a Routing Service. If you select multiple instance the measures displayed on the view relate to a collection of data, for example a collection of Agents or Routing Services.

The default refresh rate for all dashboards is 1 second.

You can configure chart control settings for your view. Choose from the following chart control options for your view:

- **Default:** This is the default aggregation setting. Each measure in your view is visualized separately for each dimension. For example, if you use an agent-related producer, a separate entry appears per agent for each measure selected.
- **Grouping:** If you use the Grouping setting, each measure in your view is grouped, and each dimension is visualized by using color coding and the measure value for each dimension is represented in the view.
- **Aggregation:** If you use the Aggregation setting, each measure in your view is visualized separately and the sum of all values for each measure is displayed.

You can apply filtering on the data that is visible for each table view on the dashboard. For example, you can apply filters on any measure displayed in a particular table view. Within real-time table views, the following filtering capabilities are included:

- For numerical measures on columns within a real-time view, the ability to type the number is supported.
- For string measures on columns within a real-time view, the ability to exclude and include data is supported using exclusion and inclusion filtering by adding keywords to exclude or include data.
- For state or channel type measures within a real-time view, the ability to select values to filter on, is supported within drop-downs.

You can also apply filter on a billboard view using the supervisor reporting dashboard. However, you can apply filters only on multiple instance billboards and is applicable only to string and number measures.

Producers

A producer is a collection of measures, grouped to provide contextual real-time data to supervisor reporting dashboard users. Avaya Analytics™ provides the following producers to Avaya Workspaces for use in real-time reporting dashboards:

- Agent
- Agent Group
- Agent by Account
- Agent by Not Ready Reason Code
- Routing Service
- Routing Service by Agent
- Site
- VDN
- Contact Detail

You can create dashboards using the Start of Day measure from each producer, with the exception of the Contact Detail producer.

Threshold classes

You can use thresholds in views to identify the lower and upper end of the normal range for a measure. You can also add thresholds for specify levels in between the lower and upper ends. You

can assign different colors for measures below the normal range, within the normal range, or above the normal range. Real-time views use colors to highlight measures when a measure breaches a configured threshold value. This visually alerts supervisor reporting dashboard users to significant reporting data, such as a high volume of waiting calls that requires immediate attention.

! Important:

- *Reason Code* is the parameter that defines a threshold, for the real-time report, on the agent time in **Not Ready Reason** state.
- To calculate the threshold and to observe the threshold colour change, add the **Not Ready Reason** measure time to the report.

Administrators can create threshold classes that are public and available to all users. Supervisors can create private threshold classes, visible only to the supervisor user that creates them. You can clone an existing private or public threshold class. If an administrator clones a threshold class, it is public. Otherwise, cloned threshold classes are private.

You can apply thresholds on table and billboard views only.

You can add up to 5 thresholds for each measure.

User management

You can administer permissions for supervisor reporting dashboard users by using Avaya Control Manager. Avaya Control Manager administrators can assign create, modify, delete, and view permissions to users. The types of supervisor reporting dashboard users are:

- Avaya Analytics™ Administrator: This user has permissions to access the supervisor reporting dashboard, but does not use any other Avaya Workspaces features. For example, this user cannot handle interactions. This user sees agents that are assigned to them in Avaya Control Manager Agent Groups.
- Avaya Analytics™ Supervisor: This user has permissions to access the supervisor reporting dashboard, but does not use any other Avaya Workspaces features. For example, this user cannot handle interactions. This user sees agents that are assigned to them in Avaya Control Manager Agent Groups.

You can assign Avaya Oceana® permissions to supervisor reporting dashboard users in conjunction with Avaya Analytics™ permissions. You assign Avaya Oceana® permissions to Avaya Workspaces users. The types of Avaya Workspaces users are:

- Avaya Workspaces Administrator: This user is a standard Avaya Workspaces administrator. You can assign this user Avaya Analytics™ administrator or supervisor permissions to access the supervisor reporting dashboard.
- Avaya Workspaces Supervisor: This user is a standard Avaya Workspaces supervisor. You can assign this user Avaya Analytics™ supervisor permissions to access the supervisor reporting dashboard.

What each user sees when they log on to Avaya Workspaces depends on the permissions assigned to them in Avaya Control Manager. For example, an Avaya Analytics™ Supervisor with no other user permissions assigned does not see the interaction area in Avaya Workspaces, they see only the supervisor reporting dashboard tabs.

You grant supervisor reporting dashboard access permission to these users using Avaya Control Manager. For more information about how to administer permissions for supervisor reporting dashboard users, see *Administering Avaya Oceana®*.

Logging in to the supervisor reporting dashboard

About this task

This procedure describes how to log on to Avaya Workspaces to access the supervisor reporting dashboard. The supervisor reporting dashboard is available for administrators, supervisors, and reporting users. Agents cannot access the supervisor reporting dashboard.

Before you begin

Ensure that you have the required permissions to access the supervisor reporting dashboard.

Procedure

1. Access Avaya Workspaces by using the URL that you received from the supervisor.

The URL is in the format: `https://CLUSTER-FQDN/services/UnifiedAgentController/workspaces/#/login`.

2. In the **Username** field, type the user name.
3. In the **Password** field, type the password.
4. Click **Sign in**.

Avaya Workspaces displays the Activate Agent screen.

5. In the **Profile** field, select the home or mobile profile.
6. **(Optional)** In the **Extension** field, type the extension.

You can modify this field only when you select the **Prompt agent for extension number at login** check box in Avaya Control Manager while creating the user. Otherwise, the system displays the default extension, and you cannot modify the **Extension** field.

7. Click **Activate**.

Avaya Workspaces displays the Dashboard Manager screen.

Adding a new standard measure

About this task

When you create a view, you can use a calculated standard measure.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the **Reporting Calculated Measures Manager** icon.
3. Click **Add New Calculated Measure**.
4. In the Properties pane, in the **Name** field, type the name of the new calculated measure.
5. In the **Description** field, type a description of the new calculated measure.

6. Click **Next**.
7. In the Measures pane, click **Standard**.
8. From the **Streams** list, select the viewing mode.
You can select **Start of Day** or **Contact Detail Records**.
9. From the **Producer** list, select a producers provided by Avaya Analytics™.
10. From the **Measures** list, select the measures and calculation symbols to add to the Calculated Measures panel.
The calculation symbols are (,), +, -, /, *, %.

 **Tip:**

You can also undo your previous calculation, and clear the entire calculation by clicking **Clear Calculation**.

11. Click **Save Changes**.

Example

To add a calculated measure that calculates the percentage value of offered calls not answered by agents, do the following:

- From the **Producer** list, select **Agent**.
- In the Calculated Measures panel, enter the following calculation: `Not Answered / Offered * 100`

Adding a new conditional measure

About this task

Use this procedure to add a new calculated conditional measure using logical operators.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Calculated Measures Manager icon.
3. Click **Add New Calculated Measure**.
4. In the Properties pane, in the **Name** field, type the name of the new calculated measure.
5. In the **Description** field, type a description of the new calculated measure.
6. Click **Next**.
7. In the Measures pane, select **Conditional**.
8. From the **Streams** list, select the viewing mode. You can select **Start of Day** or **Contact Detail Records**.

9. From the **Producer** list, select a Producer provided by Avaya Analytics™.
10. In the Calculated Measures panel, select a combination of IF or ELSE statements to create the desired calculated measure.

*** Note:**

- You can create a maximum of three logical operations using AND and OR operators.
- A conditional measure can have only a maximum of two ELSE IF statements.
- In the **Value** field of IF and ELSE IF statements, special characters are not allowed. However, period and underscore are allowed.
- The ELSE statement is always default and returns a string value of maximum of 20 characters.
- The conditional measure is applicable only to a table view.

11. Click **Save Changes**.

Example

To create an Agent type conditional measure, do the following:

- From the **Producer** list, select **Agent**.
- In the Calculated Measures panel, enter the following calculation: `IF Active = 0 then Agent Work State = Ready`

Adding a new view

About this task

Use this procedure to add a new view that you can use when you create a dashboard. When you add a new view, you must select the source measures you want to use in the view.

By default, all new views are private and visible only to the user that creates them. If an administrator creates the new view, the view is public. An administrator can create 60 public and a supervisor can create 60 private real-time views. However, opening too many tabs simultaneously impact the viewing of some real-time views. For example, you cannot view 50 table views at the same time.

*** Note:**

This procedure does not describe in detail each producer and measure available for use. For detailed information about Avaya Analytics™ producers and measures, see *Avaya Analytics™ Data Dictionary*.

Before you begin

- Add calculated measures, if you want to use calculated measures in your new view.
- Add threshold classes, if you want to use threshold classes in your new view.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting View Manager icon.
3. Click **Add New View**.
4. In the **Name** field, type a name for the new view.
5. In the **Description** field, type the description of the new view.
6. From the **Chart type** list, select the type of view to use. You can select **Pie chart, Bar chart, Column chart, Table, or Billboard**.
7. From the **Streams** list, select the viewing mode. You can select **Start of Day** or **Contact Detail Records**.
8. From the **Producer** list, select a Producer provided by Avaya Analytics™.

Depending on the producer you select, the subsequent fields that you must select can vary. For example, if you select an agent-related producer, you can select agents from the **Agent Id** list.

9. Complete any other fields as required for the producer you selected.
10. Click the **Measures** tab.


Important:

A maximum of 100 measures can be added to a view.


11. Select **Single Instance** or **Multiple Instance** as required for your new view.


This step does not apply to Billboard views. Billboard views support a single measure only.
12. From the **Chart Control** list, select **Default, Grouping, or Aggregation**. The Grouping option does not apply to Pie charts. See the example below for further information about chart control options.
13. From the **Thresholds** list, select the threshold class to apply to the view.

You can apply thresholds on Table and Billboard views only.
14. From the **Measures** or **Calculated Measures** list, select the check boxes for the measures you want to add to the new view. You can also use the **Search** field to search for measures.

Data in the Measures panel updates in real time if there is data available for the measures used. You can format the measures selected by clicking the drop-down list on the measures as they appear under the measures panel. For example, format how the date is displayed for a measure. You can also change the order of measures in a view by dragging and dropping the measures using the ellipsis (...) button.
15. In the Measures pane, click the  icon to apply filtering on table views.
 - For numerical measures, type the number to filter in the filter field.

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- For string measures, type the string to filter in the filter field and press **Enter**. You can add multiple string filters. Click the  icon to apply the filters.
- For state or channel measures, select the values to filter in the filter field. For example, select Chat to filter on chat contacts.

When you apply a filter to a measure, the  icon appears beside the name of the measure. When you save a view, the filters persist and are visible everywhere the view is used.

Note:

Filters only persist when you apply the filter while editing and or creating the view.

16. In the Measures pane, click the **Show Summary** button.

The Calculated Measures panel displays the summary row that has numerical values based on count of numeric values and the calculated percentage measure. This is applicable for Table view only.

17. **(Optional)** Click the **Hide Summary** button to hide the summary row.

18. Click **Save Changes**.

Example

For each of these examples, the Bar chart view is using the Answered and Not Answered measures for the Agent by account producer. Each image shows examples where the chart control type is different.

Example of Bar chart view using **Default** chart control:



Example of Bar chart view using **Grouping** chart control:



Example of Bar chart view using **Aggregation** chart control:



Adding a new dashboard

About this task

Use this procedure to add a new real-time reporting dashboard that you can use to monitor up-to-date statistics for your contact center. A dashboard is a collection of one or more real-time data views.

By default, all new dashboards are private and visible only to the user that creates them. If an administrator creates the new dashboard, the dashboard is public.

* Note:

Administrators can create 10 public and supervisors can create 10 private real-time dashboards.

Before you begin

- Create at least one view.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the **Reporting Dashboard Manager** icon.
3. Click **Add New Dashboard**.
4. On the **Configuration** tab, in the **Name** field, type a name for the new dashboard.
5. In the **Description** field, type the description of the new dashboard.
6. If you want to add a title, select **Add Title to Dashboard** and type the title name in the **Title** field.
7. From the **Icon** list, select the icon to use to identify the new dashboard.
8. If you want this dashboard to appear as the default dashboard on the Dashboard Manager screen, select the **Set as Default Tab** check box.
9. Under **Select Layout**, select a layout for the new dashboard by selecting a check box.
10. On the Select Views panel, from the **Select View** lists, select one or more views to add to the new dashboard.
11. Click **Save Changes**.

Viewing a real-time dashboard

About this task


Use this procedure to view one of your real-time dashboards, and apply filtering if required. You can only view dashboards that you have access to.

Procedure



1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Viewer icon.
3. Click the tab of the dashboard you want to view.


The viewer panel displays the views for the dashboard.

Note:

If you want to view a real-time dashboard in a new browser window, click the  icon.

You can view up to 20 real-time dashboards, 10 of which are public dashboards and 10 are private dashboards. This does not include the default OOTB real-time dashboards.

4. Click the  icon to apply filtering on table views in dashboards.
 - For numerical measures, type the number to filter in the filter field.
 - For string measures, type the string to filter in the filter field and press **Enter**. You can add multiple string filters. Click the  icon to apply the filters.
 - For state or channel measures, select the values to filter in the filter field. For example, select Chat to filter on chat contacts.

When you apply a filter to a measure, the  icon appears beside the name of the measure. Filter in views only persist when you apply the filter while editing or creating a real-time view.

5. Click the **Clear Filters** button to clear the filters from all measures.
6. Click the **Show Summary** button.

The viewer panel displays the summary row that has total value based on count of numeric values and the percentage value. This is applicable for Table views only. Billboard, Pie chart, Bar chart, and Column chart support summation of String measures.

When you apply filter and search by value or add keywords to filter, the summary row displays the searched results.

7. **(Optional)** Click the **Hide Summary** button to hide the summary row.

Applying filter on a billboard view


About this task

The supervisor reporting dashboard provides an option to apply filter on a billboard to determine how a measure applies to different sets of data.

Note:

You can apply filter only on multiple instance billboards and is applicable only to string and number measures.




Custom billboard views for number and string measures support filtering.

You cannot apply filter when the data has only one instance. The  icon is greyed out and displays **Nothing to filter** message. You can apply a filter on duration and time in state measures.

If a billboard filter is created using routing service elements, for example, a new routing service is added at a later stage, the existing filter must be edited and the new routing service must be added.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the **Reporting Dashboard Viewer** icon.

3. Click the tab of the dashboard that you want to view.
The viewer panel displays the views for the dashboard.
 4. Click  to apply filtering on billboard views in dashboards.
 5. For numerical measures, click **Filter by Dimension** and click the required value. For the dimension you choose, the filter counts the total measure. For example, When you have billboard for Active calls and select agents, then the filter displays only the number of active calls for these agents.
 6. For string measures, do the following:
 - a. Click **Filter by Dimension** field and click the required value. You can also type the string and click  to add values to the **Filter by Dimension** field.
 - b. In the **Value** field, type the measure value keywords.
-  **Note:**
You can add a maximum number of three keywords to apply the filter.
7. Click **Apply filters**.
The filters that you apply when you add or edit a new view in the Reporting View Manager, persist during view changes and between sessions. However, filters you apply using the Dashboard Viewer do not persist.
 8. **(Optional)** Click **Clear Filters** to clear the filters from all measures.

Excluding and including data in a search result

About this task

Avaya Analytics™ supervisor or reporting user can add keywords to exclude data in the search result in a real-time table view. Search result is based on OR logic in the filter. Currently, AND logic in the filter is not supported.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Viewer icon.
3. Click the tab of the dashboard you want to view.
The viewer panel displays the views for the dashboard.
4. In the **Exclusion** filter field, enter your keyword.
The **Exclusion** filter field is available on columns that contain measures with string values. You can apply filters on multiple columns of the reporting table view.

*** Note:**

You must enter an exact match for the keyword. The search result do not fetch any data for a partial match. However, keywords are case insensitive.

The filters that you apply when you add or edit a new view in the Reporting View Manager, persist during view changes and between sessions. However, filters you apply using the Dashboard Viewer do not persist.

5. Click `Enter` key on your keyboard.

Click `Enter` key each time when you want to add multiple keywords.

6. Click **Apply filter**.

The viewer panel displays result for the filters applied in both the **Inclusion** and **Exclusion** fields.

7. **(Optional)** Click **Clear Filters**.

The viewer panel displays the default table view.

Exporting a dashboard

About this task

Use this procedure to export a real-time reporting dashboard. Other supervisor reporting dashboard users can then import and use a dashboard that you created.

When a supervisor is exporting the custom dashboard, it does not bring the thresholds and calculated measures. Thresholds and calculated measures must be manually recreated and then applied to the imported dashboard. If an administrator creates a custom dashboard with custom thresholds and measures, there is no requirement to export, as it is available to all supervisor users.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Manager icon.
3. On the **Customize Dashboard** tab, click on the **Export Dashboard** icon for the dashboard that you want to export.

The exported dashboard is saved as a .json file in the default download location of your browser.

Hiding or showing a real-time dashboard

About this task

Use this procedure to hide or show a real-time dashboard on the Dashboard Viewer screen. It is only a user-level setting that can be set on any canned, public, or private dashboard.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the **Reporting Dashboard Manager** icon.
3. Click the **Customize Dashboard** tab.
4. To hide a dashboard, locate the dashboard on the Customize Dashboard tab and click the **Hide Dashboard** icon.
5. On the Dashboard Manager screen, verify that the screen does not show the dashboard.
6. To show a hidden dashboard, locate the hidden dashboard on the Customize Dashboard tab and click the **Unhide Dashboard** icon.
7. On the Dashboard Manager screen, verify that the screen shows the dashboard.
8. **(Optional)** To show all hidden dashboards, click **Reset Hidden Dashboards**.

Importing a dashboard

About this task

Use this procedure to import a real-time reporting dashboard. You can import a dashboard created by another supervisor reporting dashboard user, which you can then use.

When a supervisor is importing a dashboard created by another supervisor-reporting dashboard user, and that dashboard contains thresholds and calculated measures, they must be manually recreated and then applied to the imported dashboard, to be available on the imported dashboard views.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Manager icon.
3. On the **Customize Dashboard** tab, click **Import Dashboard**.
4. Navigate to the location of the exported dashboard, select the .json file and click **Open**.

On the **Customize Dashboard** tab, Avaya Workspaces displays the imported dashboard in the list.

Editing a view

About this task

Use this procedure to edit an existing view.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting View Manager icon.
3. Under **Views**, click on the **Edit view** icon for the view that you want to edit.
4. Edit the view as required.

You can format the measures selected by clicking on the measures as they appear under the measures panel. For example, format how the date is displayed for a measure. You can also change the order of measures in a view by dragging and dropping the measures using the ellipsis (...) button.

5. Click **Save Changes**.

 **Note:**

The view is not updated automatically in any dashboards that use this view. If you want to update the edited view on the dashboards, you must manually re-select the view in the dashboards using this view.

Editing a dashboard

About this task

Use this procedure to edit an existing real-time reporting dashboard.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Manager icon.
3. On the **Customize Dashboard** tab, click on the **Edit Dashboard** icon for the dashboard that you want to edit.
4. Edit the dashboard as required.
5. Click **Save Changes**.

Cloning a view

About this task

Use this procedure to clone an existing view. You can then edit the cloned version of the view.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting View Manager icon.
3. From the **Views** list, click on the **Clone View** icon for the view that you want to clone.
4. On the Clone View window, type the name for the cloned view.
5. Click **Save**.

Avaya Workspaces displays the cloned view in the **Views** list.

Cloning a dashboard

About this task

Use this procedure to clone an existing real-time reporting dashboard. You can then edit the cloned version of the dashboard.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Manager icon.
3. On the **Customize Dashboard** tab, click on the **Clone Dashboard** icon for the dashboard that you want to clone.
4. On the Clone Dashboard window, type the name for the cloned dashboard.
5. Click **Save**.

On the **Customize Dashboard** tab, Avaya Workspaces displays the cloned dashboard in the list.

Deleting a view

About this task

Use this procedure to delete a view. You can only delete views that you have created. You cannot delete an Avaya-provided view or a public view.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting View Manager icon.
3. From the **Views** list, click on the **Remove view** icon for the view that you want to delete.
4. On the Remove View window, click **OK** to confirm that you want to delete the view.

Avaya Workspaces removes the view from the **Views** list.

* Note:

The view is not removed from any dashboards that use this view. If you want to remove the view from dashboards, you must manually edit the dashboards.

Deleting a dashboard

About this task

Use this procedure to delete a real-time reporting dashboard.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Reporting Dashboard Manager icon.
3. On the **Customize Dashboard** tab, click on the **Remove Dashboard** icon for the dashboard that you want to delete.
4. On the Remove Dashboard window, click **OK** to confirm that you want to delete the dashboard.

On the **Customize Dashboard** tab, Avaya Workspaces removes the dashboard from the list.

Adding a new threshold class

About this task

Use this procedure to add a new threshold class that you can use to determine how measures are treated in real-time views. You can use thresholds in views to identify the lower and upper end of the normal range for a measure. You can assign different colors for measures below the normal range, within the normal range, or above the normal range. You can add up to 5 thresholds for each measure.

Some measures relate to agent or contact state. For example, Agent Time Logged in, Agent Time In Work State, or State Effective Timestamp. If you select one of these measures to add a threshold for, you must also select the corresponding agent or contact states to add thresholds for.

By default, all new threshold classes are private and visible only to the user that creates them. If an administrator creates the new threshold class, the view is public.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Threshold Classes icon.
3. Click **Add New Threshold**.
4. In the **Name** field, type a name for the new threshold class.
5. In the **Description** field, type the description of the new threshold class.
6. Click the **Measures** tab.
7. From the **Streams** list, select the viewing mode. You can select **Start of Day** or **Contact Detail Records**.
8. From the **Producer** list, select a Producer provided by Avaya Analytics™.
9. From the **Measures** list, select the measure that you want to add a threshold for.

You can select multiple measures to add to the Thresholds panel.

10. To add more thresholds for each measure, click the **Add a column** icon.
11. From the drop-down list for each measure, select a color for each threshold.

Real-time views use this color to highlight measures when the measure breaches the configured threshold values.

12. In the **Value** fields, type the value for each threshold range. You can also leave values for some thresholds blank.
 - If you enter a numerical value, the threshold makes a greater than or equal to comparison.
 - If you enter a string value, the threshold makes an exact match. For example, an exact match of an agent state or reason code.
 - For state values, you must select the corresponding state and type the numerical threshold value for each state. For time in state measures, you can set thresholds based on the length of time a measure has been in a state. For example, for the Agent Time Logged in measure, configure thresholds so that the color styling changes depending on the length of time an agent is in the Ready state.
13. **(Optional)** If you added measures related to agent or contact state, select the state from the drop-down list.
14. **(Optional)** To add threshold values for multiple states for a measure, click **Add Row** and type the value for each threshold range in the **Value** fields.
15. Click **Save**.

Editing a threshold class

About this task

Use this procedure to edit an existing threshold class.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Threshold Classes icon.
3. From the **Threshold Classes** list, click on the **Edit threshold** icon for the threshold class that you want to edit.
4. Edit the threshold class as required.
5. Click **Save**.

Deleting a threshold class

About this task

Use this procedure to delete a threshold class.

Procedure

1. Log in to the supervisor reporting dashboard.
2. Click the Threshold Classes icon.
3. From the **Threshold Classes** list, click on the **Remove Threshold Class** icon for the threshold class that you want to delete.
4. On the Remove Threshold Class window, click **OK** to confirm that you want to delete the threshold class.

Avaya Workspaces removes the threshold class from the **Threshold Classes** list.

Chapter 6: Customization

Integration of Avaya Workspaces for Avaya Oceana® and Avaya Workplace Client

Avaya Workplace Client overview

Avaya Workplace Client is a SIP-based softphone application. Using this application, users can access the Avaya Aura® Unified Communications voice features. Users can also access the conferencing capabilities, video capabilities, collaboration and presence, directory features, and screen sharing.

Depending on the customer infrastructure, you can deploy Avaya Workplace Client on-premise in the enterprise, or outside the enterprise. The Avaya Workplace Client can be deployed outside the enterprise as an internet-based remote worker application, connecting through Avaya Aura® Session Border Controller to the back-end Avaya Aura® applications.

The primary user type supports voice and or video calls, Instant Messenger (IM), and presence. Avaya Workplace Client also provides Over the Top (OTT) functionality, such as conferencing and directory integration, depending on the license. The OTT functionality is independent of the Avaya Oceana® contact center applications.

Avaya Workplace Client customers can deploy the full range of the supported features and integrations to Avaya Oceana®. These features are not used by the Avaya Oceana® main application or integrated into Avaya Oceana® outside the Avaya Workplace Client.

For more information, see the following documents:

- *Avaya Workplace Client Overview and Specification for Android, iOS, Mac, and Windows*
- *Using Avaya Workplace Client for Android, iOS, Mac, and Windows*
- *Planning for and Administering Avaya Workplace Client for Android, iOS, Mac, and Windows*

Avaya Workspaces for Avaya Oceana® and Avaya Workplace Client

The deployment of the Avaya Workplace Client is independent of the Avaya Oceana® solution. However, there are pre-requisites for the Avaya Aura® infrastructure configuration to implement the Avaya Workplace Client in a secure telecommunications environment.

The following table lists the minimum versions of the Avaya Aura® infrastructure required to support Avaya Workplace Client as a SIP endpoint for Avaya Oceana® and Avaya Analytics™ users:

Table 1: Avaya Aura® infrastructure

Components	Minimum Tested Versions*
Avaya Aura® System Manager	8.1.3
Avaya Aura® Session Manager	8.1.3
Avaya Aura® Communication Manager	8.1.3.1.0-FP3SP1
Avaya Aura® Media Server	8.0.2
Avaya Aura® Application Enablement Services	8.1.3
Avaya Workplace Client	3.14, 3.15, and 3.16
*Earlier versions of these products are not tested.	

Supported call scenarios

Avaya Workspaces for Avaya Oceana® users can use Avaya Workplace Client as an endpoint for handling Oceana® routed, and non-Oceana® routed voice contacts.

- Oceana® routed voice contact - Customer voice call routed to Avaya Workspaces for Avaya Oceana® user, using Engagement Designer workflows, and reported and monitored by Avaya Analytics™.
- Non-Oceana® routed voice contact - Direct voice call initiated by Avaya Workspaces for Avaya Oceana® user to other destinations, or a direct external call to Avaya Workspaces for Avaya Oceana® user.

Important:

Currently, use of Avaya Workplace Client as a video endpoint for Oceana routed video calls is not supported.

Avaya Workspaces for Avaya Oceana® users, use Avaya Workspaces to access the contact center functionalities, such as Login, Activate, Logout, and to control all voice contacts at their desktop. Interoperability between Avaya Workspaces for Avaya Oceana® and Avaya Workplace Client involves validating Computer Telephony Integration (CTI) control of the Avaya Workplace Client from the browser-based Avaya Workspaces.

The following table lists the supported voice operations for Avaya Oceana® and Avaya Analytics™ users using Avaya Workplace Client as their voice endpoint:

Table 2: Voice functionality for Oceana® routed and Non-Oceana® routed voice contacts

Condition for Avaya Oceana® users using Avaya Workspaces	Oceana® routed voice contacts	Non-Oceana® routed voice contacts
Receives a new work card for an incoming voice contact.	Supported	Supported
Answers the voice calls by clicking the accept icon on the work card.	Supported	Supported

Table continues...

Condition for Avaya Oceana® users using Avaya Workspaces	Oceana® routed voice contacts	Non-Oceana® routed voice contacts
Places the active voice call on-hold by clicking the hold icon.	Supported	Supported
Ends the calls by clicking the call release icon.	Supported	Supported
Blind transfers the active calls to other destinations by clicking the transfer icon.	Supported	Supported
Consult transfers the active calls to other destinations by clicking the consult transfer icon.	Supported	Supported
Initiates voice calls to other destinations by using Avaya Workspaces CTI controls.	N/A	Supported

Social messaging platforms

You can integrate the following social messaging platforms with Avaya Oceana® through the Avaya Digital Connection platform:

- [WhatsApp integration](#) on page 101
- [Facebook messenger integration](#) on page 102
- [Twitter Direct Messages integration](#) on page 103

Messaging platform capabilities

*** Note:**

Supported features are dependent on the Social Messaging platforms and may change. Some features may not be available in Europe due to privacy regulations.

Feature	Description	WhatsApp	Facebook Messenger	Twitter DM
Text and emojis	Send and receive plain text messages and Unicode emojis.	Supported	Supported	Supported
Images, stickers, and GIFs	Displays images to the end-user.	Supported	Supported	Supported The images are displayed inline in the Twitter application.

Table continues...

Feature	Description	WhatsApp	Facebook Messenger	Twitter DM
Links	Displays web links as buttons. Transform links into clear calls to action.	Supported	Supported	Supported
Locations and location requests	Send and receive geolocation messages. Request the current location of the user.	Supported * Note: WhatsApp groups or WhatsApp end-users sending live location is not supported.	Supported Location - shared as a URL. Location request - shared as a static message.	Supported Location - shared as a URL.
Reply	Suggests a few answers to reply to a message.	-	-	Suggest a few answers to reply to a message.
Compound messages	Send text, image, and multiple buttons or actions, in a single message.	Supported	Supported	Supported
Postback	Triggers events on the server when you click Send . The server acts on the click and posts messages back to the user in response to the click.	-	Supported	Supported
Typing Status	Displays a typing indicator.	-	Supported	Supported
File, Audio, Video sharing	Displays files that can be shared by the agent and appears as a download link to the user.	-	Supported	Supported Depending on the format of the file, an audio or video player may open to play the file. Alternatively, they are downloaded to the user's device.

Table continues...

Feature	Description	WhatsApp	Facebook Messenger	Twitter DM
Carousel	<p>Sends a horizontally scrollable set of cards that can contain text, image, and action buttons.</p> <p>Carousels support up to a maximum of 10 message items. Each message item must include a title and at least one supported action.</p>	-	Supported	-

Business profiles displaying key business information

*** Note:**

End-users can view the business profile in the contact entry form corresponding to the connected phone number.

The following table lists the key business information for each phone number connected to the respective social messaging platform:

Business information	WhatsApp	Facebook messenger	Twitter DM
Profile picture or video	<p>Supported</p> <p>Displays the profile picture.</p>	<p>Supported</p> <p>Displays profile picture or video.</p>	-
Business name	-	-	Supported
Business address and map location	<p>Supported</p> <p>Displays the business address.</p>	<p>Supported</p> <p>Displays business address and map location.</p>	<p>Supported</p> <p>Displays the business location.</p>
Business description	Supported	Supported	Supported
Business contact email	Supported	Supported	-
Business industry	Supported	Supported	-
Business website	Supported	Supported	Supported
Opening hours	-	Supported	-

WhatsApp integration

WhatsApp offers simple, secure, reliable messaging and calling on phones all over the world. WhatsApp provides an API for businesses that allows the enterprise software to message customers over WhatsApp. You can respond to customer service requests, resolve urgent customer issues, deliver timely notifications, and automate responses for frequently asked questions (FAQ). It can also be integrated into a Customer Relationship Management (CRM) system to track ticket resolution and enrich customer data.

Enrollment

The WhatsApp Business Solution program is opening in a Limited Access capacity where WhatsApp approval is required for all businesses entering the program. WhatsApp and solution providers are bringing businesses onto WhatsApp to benefit brands and the end-users.

Avaya can help customers with this enrollment; the first step is to register interest in this early access program. While the Avaya customer waits for approval from the WhatsApp team, they can start testing the integration using the Sandbox for WhatsApp. The testing is limited to only accepting messages from a single WhatsApp account and does not support the template messages.

Agents and WhatsApp message templates

WhatsApp Template Messages (WTMs)

Template Messages are message formats for common reusable messages sent by businesses to their customers. For more information on template messaging, see <https://developers.facebook.com/docs/whatsapp/message-templates/creation>.

Important:

When an end-user sends a message to the business, the business must respond to the message within 24 hours. If you do not respond within 24 hours, WhatsApp prevents you from sending a standard message. Instead, you can respond with a paid-for WhatsApp message template.

Note that your attempt to send a regular message is not prevented in Avaya Workspaces but rejected by WhatsApp. WhatsApp and not Avaya imposes this limitation.

The 24-hour reply window begins from the last end-user message, not when the conversation is initiated or when the agent answers the contact.

The following table lists the system behaviors for WhatsApp message templates:

Scenario	System Behaviour
<p>End-user sends a message to the business WhatsApp number.</p> <p>More than 24 hours have elapsed since the customer message. The contact is then routed to an agent.</p>	<p>The agent is advised to use a WTM in response. System welcome message is not sent.</p> <p>WhatsApp rejects any further regular messages sent to the end-user until the end-users' next reply.</p>
<p>End-user sends a message to the business WhatsApp number.</p> <p>More than 24 hours have elapsed since the customer message. The contact is then routed to an agent.</p> <p>The agent replies with a WTM.</p>	<p>The WTM is delivered to the end-user.</p> <p>WhatsApp rejects any further regular messages sent to the end-user until the end-users' next reply.</p> <p>The reply from the end-user resets the 24-hour window and allows the business to send standard messages again.</p>
<p>End-user sends a message to the business WhatsApp number.</p> <p>More than 24 hours have elapsed since the customer message.</p> <p>Agent sends a WTM in reply.</p> <p>Agent immediately sends a standard message in reply without waiting for an end-user reply message.</p>	<p>The WhatsApp Message Template is delivered to the end-user.</p> <p>WhatsApp rejects any further regular messages sent to the end-user until the end-users' next reply.</p> <p>Multiple WTMs can be sent consecutively, but regular messages cannot be sent until the end-user replies.</p>
<p>End-user sends a message to the business WhatsApp number.</p> <p>23 hours 55 minutes have elapsed.</p> <p>The contact is then routed to an agent.</p> <p>The agent waits more than 5 mins before sending a regular reply message.</p>	<p>Regular messages sent to the end-user are rejected as more than 24 hours have elapsed since the last end-user message.</p> <p>The agent should not use a WTM, as checks for the applicability of a template message occurs when the contact is answered by the agent.</p>

Facebook messenger integration

Facebook Messenger enables sharing messages, images, and media between Facebook and Instagram users, including creating rooms and making payments. Avaya Oceana® supports end-users interacting with the Contact Center through Facebook Messenger.

*** Note:**

The support does not extend to the public messages posted to a business page. For more information on public social media, contact Avaya Support Services. Avaya Oceana® does not support end-users messaging through Instagram to a Facebook Messenger business account.

Using Facebook Messenger, the end-users can manage a business account, share messages, images, or other media. Facebook Messenger is accessible through an Enterprise API. Avaya Oceana® uses the API to collect messages, provide automation, and route information to Avaya

Oceana® agents according to the routing preferences. Agents can respond with messages or rich media.

Avaya Oceana® does not support the following Facebook Messenger capabilities:

- Facebook Messenger Rooms
- Payments
- Messenger Kids
- Reactions

*** Note:**

- For alternate video chat capabilities for Avaya Oceana®, contact Avaya Support Services.
- The Reply messages feature supports only new replies. The original message is not re-quoted.

To connect your Facebook account to Avaya Oceana®, you must share the following details with the Avaya Digital Connection account team:

- Facebook Username
- Facebook Password
- The Facebook Business Page that you want to connect

Twitter Direct Messages integration

Avaya Oceana® supports messaging to a business through Twitter Direct Message (DM). Using Twitter DM, the end-users can send private messages and media to a business, which are routed to designated Contact Center agents or handled through automation. You can share a range of messages and media.

*** Note:**

This solution describes engagement through private messaging only, and public tweet is not supported. For more information on public Twitter mining solutions, contact Avaya Support Services.

Avaya Oceana® uses the Twitter Enterprise APIs to collect messages and media, provide automation, and route information to Avaya Oceana® agents according to the routing preferences.


Note that though Twitter DM supports rich media types, end-user receives rich media as hyperlinks.

To connect your existing Twitter account to Avaya Oceana®, you must share the following details with the Avaya Digital Connection account team:

- Twitter Handle
- Twitter Password

Downloading the Avaya Workspaces logs

Procedure


1. Log in to Avaya Workspaces.
2. In the navigation pane, click the  icon.
The system displays the Settings widget.
3. Click the **LOGS** tab.
4. Select the time period for which you want to view logs.
5. Click one of the following:
 - **DOWNLOAD**: Avaya Workspaces downloads a zip file of log files to the Downloads folder on your client computer. You can then share or send an email with the logs to your Supervisor or support personnel.
 - **UPLOAD**: Avaya Workspaces automatically uploads a zip file of log files to a pre-configured central storage location set by your administrator. Note the date and time when you click **UPLOAD**. You must share the date and time of the upload with your Supervisor or support personnel so that they can identify and retrieve the logs.

Configuring the agent state timer

About this task

Use this procedure to configure agent state timer. The agent state timer resets each time the agent changes state.

Procedure

1. In the navigation pane, click the Settings icon ().
Avaya Workspaces displays the Settings widget.
2. Click the **General** tab.
3. In the **Appearance** section, select or clear the **Show Agent state timer** check box.
4. Click **Save**.

Configuring the option to remove non-numeric characters

About this task

In the **Enter phone number** field on Agent Workspace, if you paste a number with any gaps or non-numeric characters, you must manually remove the non-numeric characters before dialing the

number. Therefore, you must configure this option so that Avaya Workspaces automatically removes non-numeric characters from the phone number.

Procedure

1. In the navigation pane, click the Settings icon (⚙️).
Avaya Workspaces displays the Settings widget.
2. Click the **General** tab.
3. In the **Appearance** section, select the **Automatically remove non-numeric characters when pasting into the "Enter Phone Number" field** check box.
4. Click **Save**.

Connecting to the Salesforce CRM from Avaya Workspaces

About this task

Use this procedure so that Avaya Workspaces can connect to the Salesforce CRM, and Avaya Workspaces users can use the address book to view Salesforce contacts.

Procedure

1. In the navigation pane, click the Settings icon (⚙️).
Avaya Workspaces displays the Settings widget.
2. Click the **CRM** tab.
3. Click **Authenticate User**.
4. Enter your Salesforce user credentials.
On successful authentication, Avaya Workspaces displays a green notification in the right corner.
5. Check the address book for the list of users from Salesforce.
You have successfully configured Avaya Workspaces to connect to Salesforce.

Creating an HTML email signature

Procedure

1. In the navigation pane, click the Settings icon (⚙️).
The system displays the Settings widget.

2. Click the **EMAIL SIGNATURE** tab.
3. Click **HTML**.
4. Add the content of the signature.
5. Set the formatting of the content, such as the font style, font color, and font size.
6. To insert an image:
 - a. Click the Image icon.
 - b. Select an existing image, or click **Upload new image** to use another image.

The following are the allowed image file types: .bmp, .gif, .ico, .jpeg, .jpg, .png.
 - c. Click **Insert selected image**.
7. Select the **Automatically insert my signature in all emails** check box to switch automatic signature inserting.
8. Click **Save**.
9. To modify the signature, update the content, style, or size depending on the type of signature.
10. Click **Save**.
11. To delete the signature, clear the content and clear the **Automatically insert my signature in all emails** check box.
12. Click **Save**.

Creating a plain email signature

Procedure

1. In the navigation pane, click the Settings icon (⚙).

The system displays the Settings widget.
2. Click the **EMAIL SIGNATURE** tab.
3. Click **Plain**.
4. Add the content of the signature.
5. Select the **Automatically insert my signature in all emails** check box.
6. Click **Save**.
7. To modify the signature, update the content.
8. Click **Save**.
9. To delete the signature, clear the content and the **Automatically insert my signature in all emails** check box.


10. Click **Save**.

Changing preferences for audio notifications

About this task

You can change the audio notification preferences from the Settings page.

Procedure

1. In the navigation pane, click the  icon.
The system displays the Settings widget.
2. Select or clear the check boxes next to the following fields:

- **System notifications**
- **DTMF**
- **Incoming Call notifications**
- **Incoming Video notifications**
- **Incoming Chat notifications**
- **Incoming Email notifications**
- **Incoming Messaging notifications**
- **Incoming SMS notifications**
- **Incoming Social notifications**
- **Incoming Generic Channel notifications**

You can also select the **Select All** check box to select all fields.


3. Click **SAVE**.

Configuring desktop notification settings

About this task

Use this procedure to configure desktop notification settings. The user can choose which type of notifications they receive when Avaya Workspaces is not in focus or is minimized.

Procedure

1. In the navigation pane, click the Settings icon ().
Avaya Workspaces displays the Settings widget.


2. Click the **NOTIFICATIONS** tab.
3. If you want a desktop notification to appear when an interaction is alerting on Avaya Workspaces, select the **Alerting Interaction** check box.
4. If you want a desktop notification to appear when you receive messages during an interaction, select the **Incoming Messages** check box.
5. Click **Save**.

Selecting the preferred language

About this task

Avaya Workspaces supports multiple languages for its user interface. Agents can select their preferred language to work in their workspaces.

Procedure

1. In the navigation pane, click the  icon.
The system displays the **Settings** widget.
2. Click the **LANGUAGE** tab.
3. In the **Please choose your preferred language** field, select your preferred language from the following list:

Icon	Language
Deutsch	German
English (US)	English (US)
Español (LA)	Latin American Spanish
Français	French
Italiano	Italian
Português (BR)	Brazilian Portuguese
Русский	Russian
العربية	Arabic*
中文 (简化)	Simplified Chinese











Table continues...

Icon	Language
中文 (繁體)	Traditional Chinese
日本語	Japanese
한국어	Korean
* The script of the Arabic language is Right-to-left. Therefore, when you set Arabic as your preferred language, Avaya Workspaces for Avaya Oceana® flips the Agent Workspace page horizontally and displays the text of all user interface elements in Arabic.	

Avaya Workspaces displays all elements on the user interface in the language that you selected.

Settings field descriptions

AUDIO

Name	Description
Select All	Selects all the checkboxes.
 System notifications	Enables or disables sound for the system.
 DTMF	Enables or disables sound for DTMF audio tones.
 Incoming Call notifications	Enables or disables voice notification for incoming voice interactions.
 Incoming Video notifications	Enables or disables voice notification for incoming video interactions.
 Incoming Chat notifications	Enables or disables voice notification for incoming chat interactions.
 Incoming Email notifications	Enables or disables voice notification for incoming email interactions.
 Incoming Messaging notifications	Enables or disables voice notification for incoming messaging interactions.
 Incoming SMS notifications	Enables or disables voice notification for incoming SMS interactions.
 Incoming Social notifications	Enables or disables voice notification for incoming social interactions.
 Incoming Generic Channel notifications	Enables or disables voice notification for incoming Generic Channel interactions.

Button	Description
Save	Saves changes for audio notifications.

GENERAL

Button	Description
Automatically remove non-numeric characters when pasting into the "Enter Phone Number" field	Removes non-numeric characters entered for a phone number.
Show Agent state timer	Displays the agent state timer next to the agent state in the Agent toolbar.

CRM

In the **CRM** tab, you can authenticate the user in CRM.

Button	Description
Authenticate User	Authenticates the user in CRM.

LANGUAGE

In the **LANGUAGE** tab, you can select a language.

Name	Description
Please choose your preferred language	Selects the language.

LOGS

In the **Logs** tab, you can download Avaya Workspaces logs.

Name	Description
Time period selection	Specifies the time period for which logs are stored. The options are: <ul style="list-style-type: none"> • Last 10 minutes • Last 30 minutes • Last hour • Full session (Default)

Button	Description
UPLOAD	Uploads a zip file with the logs for Avaya Workspaces to a pre-configured central storage location set by your administrator
DOWNLOAD	Downloads a zip file with the log files for Avaya Workspaces to your browser downloads folder.

EMAIL SIGNATURE

In the **Email Signature** tab, you can add, update, or remove the signature. Avaya Workspaces supports only one HTML and one plain text signature for each agent.

Name	Description
HTML	Creates HTML signature. With this, you can change the style and size of the text. You can also add images to the signature.
PLAIN	Creates text-only signature.
Automatically insert my signature in all emails	Adds the signature in all emails.

Button	Description
Save	Saves the email signature settings.

To delete the signature, clear the contents and clear the **Automatically insert my signature in all emails** check box.

CUSTOM LINKS

In the **CUSTOM LINKS** tab, you can set URLs for the reports to be displayed in the **CUSTOM LINKS** widget.

* Note:

This tab is displayed only for the supervisors.

Name	Description
Title	Displays the title of the report
URL	Displays the URL for the report.

Button	Description
ADD	Adds the URL to the list.
SAVE	Saves changes for reports.

LAYOUT

In the **LAYOUT** tab, you can choose your preferred layout.

* Note:

This tab is displayed only if the agents have more than one layout assigned to them. This option provides the facility for agents to switch layouts choosing from the list.

Name	Description
Please choose your preferred layout	Selects the layout.

Chapter 7: Troubleshooting

Unable to fetch the list of templates

Cause

The user is unable to fetch the list of templates due to network issues or unavailability of Omnichannel Data Provider (OCP) Data Server.

Solution

1. Press F5 or refresh the browser.
2. When the Network connectivity is up or the OCP Data Server is up, the system refetches templates from the server.

Unexpected Response from Oceana

Cause

When the System Manager or Avaya Breeze® platform authentication token expires, Avaya Workspaces displays the Unexpected Response from Oceana. Please refresh (5) Workspaces at your earliest convenience message and the Error Code: 5000003 error code.

Solution

1. Press F5 to refresh your browser and log back in to Avaya Workspaces.
2. Continue processing contacts.
3. If you cannot log back in, contact your supervisor.

Unable to open the attachment with comma in filename

Cause

When an agent receives an email with an attachment, Avaya Workspaces displays the attachment as a download link. If the filename has a comma, you cannot download the attachment from the download link. It is a known issue of the Google Chrome browser.

Solution

Copy the download link to a Mozilla Firefox browser and download the attachment.

Otherwise, you can ask the customer to resend the attachment after removing the comma from the attachment filename.

Issues with the browser

When you view multiple real-time sessions during a single long running Avaya Workspaces client session, you might experience issues with your browser. Each dashboard has the potential to open a subscription to a producer. Therefore, a potentially large volume of traffic is sent to the client. When a user views multiple dashboards and the browser remains open for a long period, the volume of traffic that the client receives can cause the browser to stop responding. To mitigate this issue, you must only click to view a maximum of two dashboards if a client is to be left open for multiple hours. If a browser stops responding, you must do a browser refresh.

Chapter 8: Resources

Documentation

Title	Use this document to:	Audience
Overview		
<i>Avaya Oceana® Solution Description</i>	Know about tested product characteristics and capabilities, including product overview and feature descriptions, interoperability, performance specifications, security, and licensing requirements.	<ul style="list-style-type: none"> • Sales engineers • Business partners • Solution architects • Implementation engineers
Implementing		
<i>Deploying Avaya Oceana®</i>	Deploy Avaya Oceana®.	<ul style="list-style-type: none"> • Sales engineers • Business partners • Solution architects • Implementation engineers
<i>Avaya Oceana® and Avaya Analytics™ Disaster Recovery</i>	Know about how to restore Avaya Oceana® when a complete outage at the primary data center.	<ul style="list-style-type: none"> • Sales engineers • Business partners • Solution architects • Implementation engineers
<i>Upgrading Avaya Oceana®</i>	Upgrade Avaya Oceana®.	<ul style="list-style-type: none"> • Sales engineers • Business partners • Solution architects • Implementation engineers
<i>Deploying Avaya Analytics™</i>	Deploy Avaya Analytics™.	<ul style="list-style-type: none"> • Sales engineers • Business partners • Solution architects • Implementation engineers
Administering		

Table continues...

Title	Use this document to:	Audience
<i>Administering Avaya Oceana®</i>	Administer Avaya Oceana®.	<ul style="list-style-type: none"> • System administrators • Supervisors
Using		
<i>Using Avaya Workspaces for Avaya Oceana®</i>	Use Avaya Workspaces for Avaya Oceana®.	<ul style="list-style-type: none"> • Agents • Supervisors
<i>Using Avaya Analytics™</i>	Use the features and capabilities of Avaya Analytics™.	<ul style="list-style-type: none"> • Supervisors • Administrators • Report designers
<i>Avaya Analytics™ Data Dictionary</i>	Use historical and real-time measures in custom reports.	<ul style="list-style-type: none"> • Administrators • Report designer
Maintaining and Troubleshooting		
<i>Maintaining and Troubleshooting Avaya Oceana®</i>	Perform maintenance and troubleshooting procedures for routine maintenance and troubleshooting of Avaya Oceana®.	<ul style="list-style-type: none"> • Support personnel • Implementation engineers • Administrators
<i>Maintaining and Troubleshooting Avaya Analytics™</i>	Perform common maintenance functions of Avaya Analytics™ and use tools and utilities for troubleshooting of Avaya Analytics™.	<ul style="list-style-type: none"> • Support personnel • Implementation engineers • Administrators
<i>Avaya Oceana® Alarms</i>	View details about Avaya Oceana® alarms.	<ul style="list-style-type: none"> • Support personnel • Administrators

Finding documents on the Avaya Support website

Procedure

1. Go to <https://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 the appropriate release number.

The **Choose Release** field is not available if there is only one release for the product.

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 only displays the documents for the selected category.

7. Click **Enter**.

Avaya Documentation Center navigation

For some programs, the latest customer documentation is now available on the Avaya Documentation Center website at <https://documentation.avaya.com>.

Important:

For documents that are not available on Avaya Documentation Center, click **More Sites > Support** on the top menu to open <https://support.avaya.com>.



Using the Avaya Documentation Center, you can:

- Search for keywords.

To filter by product, click **Filters** and select a product.


- Search for documents.

From **Products & Solutions**, select a solution category and product, and then select the appropriate document from the list.

- Sort documents on the search results page.
- Click **Languages** () to change the display language and view localized documents.
- Publish a PDF of the current section in a document, the section and its subsections, or the entire document.
- Add content to your collection using **My Docs** ().

Navigate to the **Manage Content > My Docs** menu, and do any of the following:

- Create, rename, and delete a collection.
- Add topics from various documents to a collection.
- Save a PDF of the selected content in a collection and download it to your computer.
- Share content in a collection with others through email.
- Receive collection that others have shared with you.

- Add yourself as a watcher using the **Watch** icon ().

Navigate to the **Manage Content > Watchlist** menu, and do the following:

- Enable **Include in email notification** to receive email alerts.
- Unwatch selected content, all content in a document, or all content on the Watch list page.

As a watcher, you are notified when content is updated or deleted from a document, or the document is removed from the website.

- Share a section on social media platforms, such as Facebook, LinkedIn, and Twitter.
- Send feedback on a section and rate the content.

*** Note:**

Some functionality is only available when you log in to the website. The available functionality depends on your role.

Training

The following courses are available for the Avaya Oceana® program.

Table 3: Sales Credentials

Course code	Course title	Course duration in hours	Delivery type
APSS – 1202 Avaya IX™ Contact Center Solutions for Sales			
41510W	Avaya IX™ Contact Center Portfolio Overview (for Sales)	0.75	Web-based Training
41550T	APSS Avaya IX™ Contact Center Solutions	1.0	Web-based Training
ALCC –2005 Avaya IX™ Voice and Digital Solutions for Sales			
41710W	The Avaya IX™ Contact Center Automated Story	0.50	Web-based Training
41410W	Selling Avaya Oceana®	0.75	Web-based Training
41400W	Selling Avaya Aalytics™	0.50	Web-based Training
41480W	The Basics of Cost Justification and Selling Avaya Oceana® Using the ROI Tool	0.50	Web-based Training
41770W	Avaya Experience Portal and Proactive Outreach Manager (POM) for Sales	0.25	Web-based Training

Table 4: Pre-Sales Design

Course code	Course title	Course duration in hours	Delivery type
ACDS – 3480 Avaya Oceana® Design			
34210W	Avaya Oceana® Overview for Design	1.0	Web-based Training

Table continues...

Course code	Course title	Course duration in hours	Delivery type
34810W	Designing the Avaya Oceana® Part 1 of 3	1.0	Web-based Training
34820W	Designing the Avaya Oceana® Part 2 of 3	1.50	Web-based Training
34830W	Designing the Avaya Oceana® Part 3 of 3	1.50	Web-based Training
34800X	Avaya Oceana® Design Exam	1.50	Exam
ALRI-7001 Avaya Oceana® Product Release Information Collection			
39000W	Avaya Oceana® Release 3.8 Details for Pre-Sales	1.0	Portable Document Format (PDF)
39010W	Avaya Analytics™ Release 3.8 and 4.1 Details for Pre-Sales	1.0	PDF
39020W	Avaya Breeze® Snap-Ins for Avaya Oceana® R3.8 Details for Pre-Sales	1.0	PDF

Table 5: Technical Services Partner Credentials

Course code	Course title	Course duration in hours	Delivery type
ACIS – 7495 Avaya Oceana®			
74150V	Integrating Avaya Oceana® Core and Workspaces	40.0	Virtual Instructor-Led Training
7495X	Avaya Oceana® Integration Exam	1.50	Exam
ACSS-7497 Avaya Oceana®			
74550V	Supporting Avaya Oceana®	24	Virtual Instructor-Led Training
7497X	Avaya Oceana® Support Exam	1.75	Exam
ACSS-7498 Avaya Analytics™ Insights			
74360V	Integrating and Supporting Avaya Analytics™ R4	40.0	Virtual Instructor-Led Training
74980X	Avaya Analytics™ Insights Integration and Support Exam	1.75	Exam

Table 6: Pre-requisite Courseware

Course code	Course title	Course duration in hours	Delivery type
77900W	Avaya Control Manager Training Bundle (5 courses 21900W, 77910W, 77920W, 77930W, 77940W)	5.50	Web-based Training
70160W	Avaya Breeze® Implementation and Support	30.0	Web-based Training

Table 7: End User, Programmer, Administration

Avaya Learning Center				
Course code	Course title	Course duration in hours	Delivery type	Vanity Link for Attachment
ALEU-5002 Avaya Oceana® End-User Training				
24020W	Using Avaya Workspaces for Avaya Oceana® - Agent	1.0	Web-based Training	https://www.avaya.com/oceana-agent
24040W	Using Avaya Workspaces for Avaya Oceana® - Supervisor	1.0	Web-based Training	https://www.avaya.com/oceana-supervisor
ALUC-4001 Avaya Breeze® Client SDK				
2410W	Customer Communications and Apps with Oceana® for Developers	3.0	Web-based Training	
ASDC-0010 Avaya Workspaces® Framework				
24150W	Creating Avaya Oceana® Workspaces Framework for Developers	2.0	Web-based Training	
24150W	Avaya Workspaces Framework R3 Test	1.0	Online Test	
ASAC-0010 Avaya Oceana® Administration				
21160W	Avaya Oceana® Fundamentals	0.5	Web-based Training	
24300V	Avaya Oceana® Administration Training	40.0	Virtual Instructor-Led Training	Attached with the sale
24300T	Administering Avaya Oceana® R3 Online Test	1.0	Online Test	

Table continues...

Avaya Learning Center				
Course code	Course title	Course duration in hours	Delivery type	Vanity Link for Attachment
24320W	Administering Avaya Oceana® - Basic	2.5	Web-based Training	https://www.avaya.com/Oceana-admin
ASAC-0022 Administering Avaya Analytic™ for Avaya Oceana®				
24380W	Administering Avaya Analytics™ for Oceana®	1.5	Web-based Training	https://www.avaya.com/Oceana-analyticsadmin
24310T	Administering Avaya Analytics™ R3 for Oceana® Basic Online Teat	1.0	Web-based Training	

Table 8: Other Miscellaneous Courseware

Course code	Course title	Course duration in hours	Delivery type	Vanity Link for Attachment
ALCC-0001 Avaya Workforce Optimization Select Integration with Avaya Oceana® Workspaces				
7014W	Integrating Avaya Workforce Optimization Select with Avaya Oceana® Workspaces	3.0	Web-based Training	
7014A	Avaya Workforce Optimization Select with Avaya Oceana® Workspaces Integration Assessment	1.0	Assessment	
70170W	Integrating Avaya Workspaces with Avaya Aura Call Center Elite	1.0	Web-based Training	
70170T	Avaya Workspaces for Elite Integration Online Test	1.0	Online Test	
71610W	Integrating POM with Avaya Oceana®	1.0	Web-based Training	
71610T	Proactive Outreach Manager with Avaya Oceana® Integration Online Test	1.0	Online Test	
ALEU-5005 Avaya Workspaces for Elite End User				
24120W	Using Avaya Workspaces for Elite – Agents	0.75	Web-based Training	https://www.avaya.com/elite-workspaces-agent

Table continues...

Course code	Course title	Course duration in hours	Delivery type	Vanity Link for Attachment
24140W	Using Avaya Workspaces for Elite – Supervisor	0.50	Web-based Training	https://www.avaya.com/elite-workspaces-supervisor

Support

Go to the Avaya Support website at <https://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.

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