

IP Office Contact Center - Configuration Maps

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IP Office Contact Center Configuration Maps

Overview

It can sometimes prove difficult to determine which guide from a suite of guides, should be referenced to obtain the correct information required to assist with a configuration of an application or product. To assist in this process, Configuration Maps provide guidance with regards to which Task Based Guides provide the best coverage relating to a variety of IPOCC installation tasks.

Configuration Maps list various installation and configuration tasks, along with the associated guide and the appropriate guide sections, from which step by step instructions for the implementation of the task can be found.

IP Office Contact Center Installation Configuration Map

IPOCC Process	Associated Task Based Guide	Guide Section
IPOCC	IPOCC Installation	
IP Office Contact Center Requirements	IP Office Contact Center Installation	IP Office Contact Center Capacities & License Requirements
IPOCC Server Requirements	IP Office Contact Center Installation	IP Office Contact Center Server Requirements
Defining the Servers Computer Name	IP Office Contact Center Installation	Servers Computer Name
Windows Firewall	IP Office Contact Center Installation	Windows Firewall
Configuring the Server's Time and date Settings	IP Office Contact Center Installation	Time & Date Settings
Configuring the Server's IP Address Settings	IP Office Contact Center Installation	IP Address
Configuring the Server's Power Settings	IP Office Contact Center Installation	Power Settings
Installing the IPOCC Software	IP Office Contact Center Installation	IP Office Contact Center Installation
Sybase Database Installation	IP Office Contact Center Installation	Installing the Sybase Database
Obtaining IPOCC Licenses	IP Office Contact Center Installation	Licensing
The IPOCC Configuration Spreadsheet	IP Office Contact Center Installation	Preparing the Configuration Data – For Use with the Excel Spread Sheet
Importing the Configuration Data	IP Office Contact Center Installation	Importing Data to the Sybase Database
Activating the Task Flow	IP Office Contact Center Installation	Activating a Task Flow
<i>Importing the Configuration File into the IP Office</i>	IP Office Contact Center Installation	Importing the IP Office Configuration File

IPOCC Process	Associated Task Based Guide	Guide Section
	Installing the IPOCC User Interface	
Agent PC Min Specification	IP Office Contact Center Installation	IPOCC Agent PC Requirements
Adding the server as a Trusted Site to Internet Explorer	IP Office Contact Center Installation	Adding the server as a Trusted Site to Internet Explorer
IPOCC User PC's Host File	IP Office Contact Center Installation	Adding the Server's Host Name to the IPOCC User PC's Host File
Installing the User Interface Software	IP Office Contact Center Installation	Installing the Contact Center User Interface on the Agent's PC's
Logging into the IPOCC User Interface	IP Office Contact Center Installation	Logging into the User Interface
	IPOCC Task Flow Editor - Telephony Configuration	
IPOCC Process	Associated Task Based Guide	Guide Section
Accessing the IPOCC Task Flow Editor	IPOCC Task Flow Editor - Telephony	Accessing Task Flow Editor
Defining the Default Task Flow	IPOCC Task Flow Editor - Telephony	Default Task Flow
Assigning IP Office Incoming Call Routes to a Topic	IPOCC Task Flow Editor - Telephony	IPOCC Incoming Call Access - Assigning an IP Office Incoming Call Route to a Topic
Configuring Last Known Agent based on a Customer's CLID	IPOCC Task Flow Editor - Telephony	Assign Call to Last Known Agent Task Flow
IPOCC Overflows after a Time Out Period	IPOCC Task Flow Editor - Telephony	Assigning a Queue Overflow

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Task Flow Editor - Telephony Configuration	
IPOCC and Voicemail Pro- How to configure a breakout to a VM Pro mailbox	IPOCC Task Flow Editor - Telephony	Creating a Break Out from IPOCC to VM Pro
Allowing a supervisor to manually select which announcements are played to callers.	IPOCC Task Flow Editor - Telephony	Creating a Topic, and associated Variables that will allow a Supervisor to manually select which announcements are played to Callers
Creating a Standard Auto Attendant Menu (two varying examples are available in the guides referenced here)	IPOCC Task Flow Editor – Telephony IPOCC – IVR Editor Task Based Guide	Creating a Standard Auto Attendant Menu
Adding Announcement Scripts to call flows	IPOCC Task Flow Editor – Telephony	Adding the Announcements to Announcement Scripts for use in Task Flow Editor Call Flows
Using the Personal Contact Element	IPOCC Task Flow Editor – Telephony	Personal Contact
Macros and Task Flows	IPOCC Task Flow Editor – Telephony	Macro Utilization within Task Flow Editor
	IPOCC – IVR Editor	
IPOCC Process	Associated Task Based Guide	Guide Section
IVR Database Integration	IPOCC IVR Editor Scenarios	IVR Database Integration Example
IVR Database Integration - Agent User Interface	IPOCC IVR Editor Scenarios	Agent User Interface

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC – IVR Editor	
User Interface Scenario 1 - Call presented with CLID and the customer's record is contained within the database	IPOCC IVR Editor Scenarios	User Interface Scenario 1 - Call presented with CLID and the customer's record is contained within the database
User Interface Scenario 2 - Call presented with CLID, there is no customer record but the customer does have a support contract	IPOCC IVR Editor Scenarios	User Interface Scenario 2 - Call presented with CLID, there is no customer record but the customer does have a support contract
User Interface Scenario 3 - Call presented without CLID but the support contract number is contained within the database	IPOCC IVR Editor Scenarios	User Interface Scenario 3 - Call presented without CLID but the support contract number is contained within the database
User Interface Scenario 4 - Call presented without CLID and the support contract number is not contained within the database	IPOCC IVR Editor Scenarios	User Interface Scenario 4 - Call presented without CLID and the support contract number is not contained within the database
Creating a ODBC Data Source in the IPOCC server's Customer Database	IPOCC IVR Editor Scenarios	Creating a ODBC Data Source in the IPOCC server's Customer Database
Configuring the Agents Interface for use with the IVR Script	IPOCC IVR Editor Scenarios	Configuring the Agents Interface for use with the IVR Script
Creating an IVR Script to allow a Caller to Dial a Known Extension Number	IPOCC IVR Editor Scenarios	IVR Script: To allow a Caller to Dial a Known Extension Number

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC – IVR Editor	
Creating a Local Variable to Record the DTMF Digits entered by the Caller	IPOCC IVR Editor Scenarios	Creating a Local Variable to Record the DTMF Digits entered by the Caller
Installing Additional Languages for Text To Speech Files	IPOCC IVR Editor Scenarios	Installing Additional Languages for Text To Speech Files
Configuring languages within the Voice Control Speech Configuration Dialog Box	IPOCC IVR Editor Scenarios	Configuring languages within the Voice Control Speech Configuration Dialog Box
IPOCC	IPOCC Email & Chat Services	
IPOCC Process	Associated Task Based Guide	Guide Section
IPOCC Process IPOCC Chat Service	Associated Task Based Guide IPOCC Email & Chat Services	Guide Section
	IPOCC Email & Chat	
IPOCC Chat Service Installing and configuring	IPOCC Email & Chat Services IPOCC Email & Chat	IPOCC Chat Service Installing and configuring the
IPOCC Chat Service Installing and configuring the XMPP Service Determining the Server's	IPOCC Email & Chat Services IPOCC Email & Chat Services IPOCC Email & Chat	IPOCC Chat Service Installing and configuring the XMPP Service Determining the
IPOCC Chat Service Installing and configuring the XMPP Service Determining the Server's Hostname	IPOCC Email & Chat Services IPOCC Email & Chat Services IPOCC Email & Chat Services IPOCC Email & Chat	IPOCC Chat Service Installing and configuring the XMPP Service Determining the Server's Hostname
IPOCC Chat Service Installing and configuring the XMPP Service Determining the Server's Hostname Installing Openfire Installing Openfire as a	IPOCC Email & Chat ServicesIPOCC Email & Chat Services	IPOCC Chat ServiceInstalling and configuring the XMPP ServiceDetermining the Server's HostnameInstalling OpenfireInstalling Openfire as
IPOCC Chat Service Installing and configuring the XMPP Service Determining the Server's Hostname Installing Openfire Installing Openfire as a Service Configuring the existing Topic and Agents to Use	IPOCC Email & Chat ServicesIPOCC Email & Chat Services	IPOCC Chat ServiceInstalling and configuring the XMPP ServiceDetermining the Server's HostnameInstalling OpenfireInstalling Openfire as a ServiceConfiguring the existing Topic and
IPOCC Chat Service Installing and configuring the XMPP Service Determining the Server's Hostname Installing Openfire Installing Openfire as a Service Configuring the existing Topic and Agents to Use CHAT	IPOCC Email & Chat ServicesIPOCC Email & Chat Services	IPOCC Chat ServiceInstalling and configuring the XMPP ServiceDetermining the Server's HostnameInstalling OpenfireInstalling Openfire as a ServiceConfiguring the existing Topic and Agents to Use CHATBuilding a Chat Call

IPOCC Process	Associated Task Based Guide	Guide Section
IPOCC	IPOCC Email & Chat Services	
SMTP Email Configuration	IPOCC Email & Chat Services	SMTP Email Configuration
IPOCC Email Configuration	IPOCC Email & Chat Services	IPOCC Email Configuration
Creating an E-mail Flow	IPOCC Email & Chat Services	Creating an E-mail Flow
Text Blocks/Autoreply	IPOCC Email & Chat Services	Text Blocks/Autoreply
Textblocks	IPOCC Email & Chat Services	Textblocks
How to use a textblock	IPOCC Email & Chat Services	How to use a textblock
Archiving the Email Database	IPOCC Email & Chat Services	Archiving the Email Database
Agents Availability for Tasks	IPOCC Email & Chat Services	Agents Availability for Tasks
Email Personal Signature	IPOCC Email & Chat Services	Email Personal Signature
Show search filter	IPOCC Email & Chat Services	Show search filter
Recycle Bin	IPOCC Email & Chat Services	Recycle Bin
	IPOCC Dialer	
IPOCC Process	Associated Task Based Guide	Guide Section
Dialer Definitions	IPOCC Dialer	Dialer Types
Dialer Modes	IPOCC Dialer	Dialer Modes
Dialer Configuration	IPOCC Dialer	IPOCC Dialer Configuration

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Dialer	
Allocating Channel Resources to the Dialer	IPOCC Dialer	Allocating Channel Resources to the Dialer
Creating an Agent Group to be used with the Dialer	IPOCC Dialer	Creating an Agent Group to be used with the Dialer
Creating a New Topic for Use with the Dialer	IPOCC Dialer	Creating a New Topic for Use with the Dialer
Creating a Call Flow for use with the Dialer	IPOCC Dialer	Creating a Call Flow for use with the Dialer
Defining an Access Code and Dialing Parameters	IPOCC Dialer	Defining an Access Code and Dialing Parameters
Configuring a Dialer Campaign	IPOCC Dialer	Configuring a Dialer Campaign
Updating the Agents User Interface Contact Bar for use with a Dialer	IPOCC Dialer	Updating the Agents User Interface Contact Bar for use with a Dialer
Enabling Auto Answer	IPOCC Dialer	Enabling Auto Answer
Contact Recorder	Contact Recorder Configuration	
Configuring the Avaya Contact Recorder	IPOCC Contact Recorder Configuration	Configuring the Avaya Contact Recorder
Automatic Call Recording	Contact Recorder Configuration	Automatic Call Recording
Voicemail Pro Configuration	Contact Recorder Configuration	Voicemail Pro Configuration
Using Contact Recorder	Contact Recorder Configuration	Using Contact Recorder

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Reporting	
Supervisors and the User Role Settings	IPOCC Reporting	Supervisors and the User Role Settings
Configuring Agent Privileges	IPOCC Reporting	Agent Privileges – Reporting Tab, Agent Privileges – Realtime Information Tab
Reporting Settings	IPOCC Reporting	Reporting Settings - General
Telephony System Wide Report Settings	IPOCC Reporting	Telephony System Wide Report Settings
Delete Reporting Data	IPOCC Reporting	Delete Reporting Data
Agent Group Reporting Settings	IPOCC Reporting	Agent Group Reporting Settings
Topic Reporting Settings	IPOCC Reporting	Topic Reporting Settings
Configuring Reporting Filters	IPOCC Reporting	Configuring Reporting Filters
Renaming Counters	IPOCC Reporting	Renaming Counters
Special Settings	IPOCC Reporting	Special Settings
Supervisor Interface	IPOCC Reporting	Supervisor Interface
Realtime – Predefined / Default Reports	IPOCC Reporting	Realtime – Predefined / Default Reports
Break Time Codes	IPOCC Reporting	Configuring IPOCC to use Break Time Codes, Adding Agent Break Time Codes, Using Break Time codes
Real Time Reporting	IPOCC Reporting	Real Time Reporting

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Reporting	
Objects of IPOCC that can have their Status monitored	IPOCC Reporting	Objects of IPOCC that can have their Status monitored
Configuring the Realtime Sheet(s) Properties	IPOCC Reporting	Configuring the Realtime Sheet(s) Properties
<i>Configuring a Realtime report for use with an Agent Group</i>	IPOCC Reporting	Configuring a Realtime report for use with an Agent Group
Agent Status (AG) element	IPOCC Reporting	Agent Status (AG) element
Phone State Element	IPOCC Reporting	Phone State Element
Agent Group Table Element	IPOCC Reporting	Agent Group Table Element
Individual Status (parser) element	IPOCC Reporting	Individual Status (parser) element
Active Agents (AG) Element	IPOCC Reporting	Active Agents (AG) Element
Creating and Assigning Skills	IPOCC Reporting	Creating and Assigning Skills
Historical Reporting	IPOCC Reporting	Historical Reporting
Report Production	IPOCC Reporting	Report Production
Time Periods	IPOCC Reporting	Time Periods
Reporting Methods	IPOCC Reporting	Reporting Methods, Interval reporting, Back office reporting
Creating a Historical Report from System Default Reports	IPOCC Reporting	Creating a Historical Report from System Default Reports
Custom Reporting	IPOCC Reporting	Custom Reporting

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Reporting	
Automatic Reporting	IPOCC Reporting	Automatic Reporting
Agent Status Reporting	IPOCC Reporting	Agent Status Reporting
Report Filter Settings	IPOCC Reporting	Report Filter Settings
Contact Details Reporting	IPOCC Reporting	Contact Details Reporting
Report Filter Settings	IPOCC Reporting	Report Filter Settings
Exporting Report Data	IPOCC Reporting	Exporting Report Data
	IPOCC Telephony User Interface Configuration	
IPOCC Process	Associated Task Based Guide	Guide Section
IPOCC User Interface Layout	IPOCC Telephony User Interface Configuration Task Based Guide	Logging into the User Interface / IPOCC User Interface Layout
IPOCC User Interface Administration	IPOCC Telephony User Interface Configuration Task Based Guide	IPOCC User Interface Administration
Configuring Agent and Supervisor Passwords	IPOCC Telephony User Interface Configuration Task Based Guide	Agent/Supervisor Passwords
How to configure Auto sign to an Agents Windows User Account	IPOCC Telephony User Interface Configuration Task Based Guide	Auto 'Sign on' using an Agents Windows User Account
Determining Agent Privileges and Authorizations	IPOCC Telephony User Interface Configuration Task Based Guide	Privileges and Authorization
Determining Agent Privileges and Authorizations	IPOCC Telephony User Interface Configuration Task Based Guide	Privileges and Authorization

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Telephony User Interface Configuration	
Creating User Profiles on IPOCC	IPOCC Telephony User Interface Configuration Task Based Guide	Creating Profiles
Configuring user Interface Views	IPOCC Telephony User Interface Configuration Task Based Guide	Configuring User Interface Views
Determining the Agent's Working Area's Screen Size	IPOCC Telephony User Interface Configuration Task Based Guide	Setting the Working Area's Screen Size and Settings
User Interface Configuration – Adding Elements to the Working Area	IPOCC Telephony User Interface Configuration Task Based Guide	Adding Elements to the Working Area
User Interface - Element Types	IPOCC Telephony User Interface Configuration Task Based Guide	Text Elements / List Elements / Graphics Elements/ Other Elements
Adding a Value Element & Longest Wait Time Element	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Value Element & Longest Wait Time Element to the Telephony View
Adding an Out of Office Notice	IPOCC Telephony User Interface Configuration Task Based Guide	Adding an Out Of Office Notice to the Telephony View
Adding a Variable Element	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Variable Element to the Telephony View
Adding a Call Tag	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Call Tag to the Telephony View
Adding a Customer Record	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Customer Record
Adding an Abandoned Call List	IPOCC Telephony User Interface Configuration Task Based Guide	Abandoned Call List
Adding a Bar Chart Element	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Bar Chart Element to the Working Area

IPOCC Process	Associated Task Based Guide	Guide Section
	IPOCC Telephony User Interface Configuration	
Adding a Longest Wait Time (topic) [Telephony] Element	IPOCC Telephony User Interface Configuration Task Based Guide	Longest Wait Time (topic) [Telephony] Element
Adding a Queue (Topic) [Telephony] Element	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Queue (Topic) [Telephony] Element
Adding an Individual Status LED (Alarm)	IPOCC Telephony User Interface Configuration Task Based Guide	Adding an Individual Status LED (Alarm)
Adding a Pie Chart element to the Telephony View	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Pie Chart element to the Telephony View
Adding an Agent Status (AG) Element to the Telephony View	IPOCC Telephony User Interface Configuration Task Based Guide	Adding an Agent Status (AG) Element to the Telephony View
Assigning Skills to Agents	IPOCC Telephony User Interface Configuration Task Based Guide	Creating and Assigning Skills
Creating Teams and Telephone Groups	IPOCC Telephony User Interface Configuration Task Based Guide	Teams and Telephone Groups
Adding a Phone State Element to the Telephony View	IPOCC Telephony User Interface Configuration Task Based Guide	Adding a Phone State Element to the Telephony View
Configuring the Contact Bar	IPOCC Telephony User Interface Configuration Task Based Guide	Contact Bar – User Interface
Supervisor Assistance (Silent monitoring)	IPOCC Telephony User Interface Configuration Task Based Guide	Supervisor Assistance (Silent monitoring)
Upgrading the IPOCC Client User Interface	IPOCC Telephony User Interface Configuration Task Based Guide	Upgrading the IPOCC Client User Interface

IPOCC Process	Associated Task Based Guide	Guide Section
IPOCC Maintenance	IPOCC Maintenance	
Backing up the IPOCC Database	IPOCC Maintenance	Backing up the IPOCC Database (Manually / Automatically)
Creating a Manual Backup of the IPOCC Database	IPOCC Maintenance	Creating a Manual Backup of the IPOCC Database
Creating a Daily Automatic IPOCC Database Backup to a Network location	IPOCC Maintenance	Creating a Daily Automatic IPOCC Database Backup to a Network location
Setting the Task Scheduler to run the Backups	IPOCC Maintenance	Setting the Task Scheduler to run the Backups
Testing the Tasks	IPOCC Maintenance	Testing the Tasks
Restoring IPOCC Databases	IPOCC Maintenance	Restoring IPOCC Databases
TTrace Console	IPOCC Maintenance	TTrace Console
Testing the TAPI link from TT Trace Console	IPOCC Maintenance	Testing the TAPI link from TT Trace Console
Log File Location	IPOCC Maintenance	Log File Location
Error List	IPOCC Maintenance	Error List
Configuration Report	IPOCC Maintenance	Configuration Report

Avaya Documentation

• <u>http://support.avaya.com/</u>

Avaya IP Office Contact Center Task Based Guides

- IP Office Contact Center Configuration Maps
- IP Office Contact Center Installation
- IP Office Contact Center Telephony User Interface Configuration
- IP Office Contact Center Task Flow Editor -Telephony
- IP Office Contact Center Reporting
- IP Office Contact Center IVR Scenarios
- IP Office Contact Center Contact Recorder Configuration
- IP Office Contact Center Email & Chat Service
- IP Office Contact Center Maintenance
- IP Office Contact Center Dialer Configuration

Please note, only the IPOCC Task Based Guides listed above are available from Avaya. Further IP Office Task Based Guide documentation as listed below is available directly from ITEL. <u>http://www.iteluk.com/</u>

ITEL IP Office 9.0 Task Based Guides

Initial Installation

- 1. IP Office Configuration Maps
- 2. IP Office Hardware Installation
- 3. IP Office Initialisation
- 4. IP Office Manager
- 5. IP Office Voicemail Pro Initial Installation Guide
- 6. IP Office Small Community Networking
- 7. IP Office Customer Call Reporter Initial Installation Guide
- 8. IP Office Server Edition Configuration
- 9. IP Office Security Policies

UCM

10. IP Office Unified Communications Module

Core Telephony

- 11. IP Office Telephony and Call Routing
- 12. IP Office Short Codes Summary
- 13. IP Office Hunt Group Setup and Operation
- 14. IP Office Conferencing
- 15. IP Office IP Telephony Guide
- 16. IP Office Computer Telephony Integration 1st Party

Users, Telephone & Softphone Configuration

17. IP Office Configuring IP Office Phones and User Accounts

- 18. IP Office Call Handling
- 19. IP Office Configuring the IP Office Softphone

Auto Attendant & Voicemail

- 20. IP Office Embedded Voicemail (Intuity Mode) Flowchart
- 21. IP Office Auto-Attendant Setup and Operation
- 22. IP Office Embedded Voicemail
- 23. IP Office Embedded Voicemail Flowchart

Voicemail Pro

- 24. IP Office Voicemail Pro Summary Guide
- 25. IP Office Voicemail Pro Voicemail User Guide

One X Portal & IP Office Applications

- 26. IP Office One X Portal Guide
- 27. IP Office One X Mobile Preferred Implementation
- 28. IP Office Plug-in for Microsoft® Outlook®
- 29. IP Office MS Lync Plugin
- 30. IP Office Avaya Flare
- 31. IP Office One X Mobile Essential

Customer Call Reporter – CCR

32. IP Office Customer Call Reporter Configuration Guide

33. IP Office Customer Call Reporter Wallboard Guide

Contact Store & Receptionist Console

34. IP Office Contact Store35. IP Office Receptionist Console

Maintenance

- 36. IP Office Backup and Restore
- 37. IP Office System Status Application38. IP Office Upgrading from IP Office 8.1FP1 to 9.0