



Installing and Configuring Avaya one-X[®] Agent

Release 2.0
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Chapter 1: Introduction

Avaya one-X Agent Release 2.0 is an integrated telephony softphone solution that provides seamless connectivity to at-home agents, remote agents, outsourced agents, contact center agents, and agents interacting with clients having vocal and hearing impairment. This is the second release of Avaya one-X Agent and has number of enhancements in addition to the features available in the Release 1.0.

Agent collaboration, supervisory support, and central administration capabilities are the main enhancements of Avaya one-X Agent Release 2.0. These enhancements are supported by Presence Services, System Manager, and Communication Manager. Avaya one-X Agent Release 2.0 also relies on the Call Center features of Communication Manager.

In addition to the features present in release 1.0, Avaya one-X Agent now supports new features such as instant messaging, hot-desking, supervisor monitoring, central management, TTY interaction, desktop sharing, and single sign on. The availability of new features depends on the type of Avaya one-X Agent license used for deployment.

All the enhancements are achieved maintaining the same user interface to help users adapt quickly to the new features presented in this release.

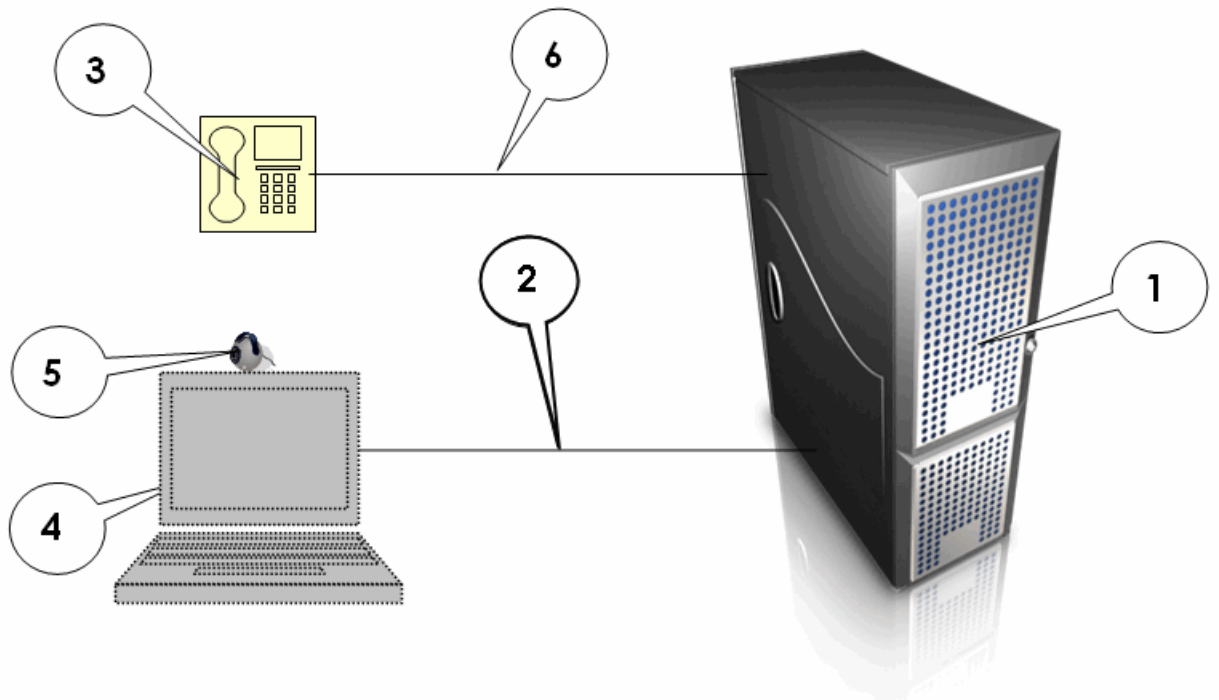
Installation overview

Avaya one-X Agent installation is available in network environments that support H.323 telephony protocols. Your enterprise can use any of the following installation methods to install Avaya one-X Agent:

- **Customer installation:** The customer installation (Avaya standard installation) allows you to download and run the installation setting manually through a wizard.
- **Silent installation:** The silent installation (Command Line Installation) allows you to run the standard install settings through a command line interface without the need of a graphical user interface. Your enterprise's system administrator tests and installs the Avaya one-X Agent installer software.
- **Push installation:** The push installation (Configurable-Silent Installation) allows you to customize the Avaya one-X Agent configuration file to meet the company's needs and push the customized configuration files in the installation file. Enterprise's system administrator customizes and pushes the file into the agent's desktop computer.

Architecture overview

Avaya one-X Agent uses the following system architecture, software integrations, and software components to provide a multi-channel contact center solution.



1	Communication Manager
2	H.323
3	Avaya IP/DCP telephone (Far Endpoint)
4	Desktop running Avaya one-X Agent
5	Video Camera (Optional)
6	Real Time Processing (RTP) to Far Endpoint

Chapter 2: Requirements

Enterprise requirements

Communication Manager

To use Avaya one-X Agent for H.323 voice or video call, you must have an extension that is properly administered for Avaya one-X Agent on a media server running one of the following version of Communication Manager:

- Communication Manager Release 2.x and higher (voice only)
- Communication Manager Release 4.x and higher (voice and video)

Avaya Video Telephony Solution

If you want to use the video feature, you must have any one of the following software packages:

- Avaya Video Telephony Solution 3.0
- Avaya Video Telephony Solution 4.0

Software requirements

Operating System

Desktop computers or laptops must have one of the following 32-bit or 64-bit operating systems:

- Microsoft Windows 7
- Microsoft Windows XP Professional with Service Pack 2 or Service Pack 3
- Microsoft Windows Vista-Ready
- Microsoft Windows Vista Service with Service Pack 1 for Business, Enterprise, or Home Premium
- Microsoft Windows 2003 Server - Terminal Services
- Microsoft Windows 2008 Server (also known as Longhorn) - Terminal Services

Software download package

You must have the following software package:

- Avaya one-X Agent installation program
- Polycom video installer (required only if you are using video)

You can download the software from the Avaya Web site:

<http://www.avaya.com/support>

Required Microsoft products

Avaya one-X Agent requires the following Microsoft products:

- Microsoft Internet Explorer 7.0 or later
- Microsoft .NET Framework 3.5 Service Pack 1
- Microsoft Redistributable Primary Interop Assemblies (PIA), required only when integrating with Microsoft Office 2003 or 2007
- Windows Media Player R10 or higher, required if you are using the H.323 protocol

You can download the software from the Microsoft Web site:

<http://www.microsoft.com>

Feature dependencies on configuration

The following table shows the availability of Avaya one-X Agent features supported by 32 bit, 64 bit and Server OS recommended for Avaya one-X Agent.

Feature Name	32 bit operating system	64 bit operating system	Server operating system
ACD	Available	Available	Available
Telephony	Available	Available	Available
Video	Available	Not Available	Not Available
IM/Presence	Available	Available	Available
TTY	Available	Available	Not Available
Desktop Sharing	Available	Available	Available
Supervisor	Available	Available	Available
My Computer mode	Available	Available	Not Available

Computer and other hardware requirements

Important:

Ensure that the hardware components are properly configured and functioning as intended in your personal computer. Any improperly configured devices in your personal computer can potentially cause problems with the normal functionality of Avaya one-X Agent. The

hardware components may include sound card, disc drive, hard disk drive, mouse, and video card.

Hardware specifications for users not using media types

Users using extensive Desk Phone or Other Phone connection modes need to have the following minimum client hardware. Systems with these specifications do not leverage any other media type, such as VoIP, Video, Desktop Sharing, or IM.

Processor	733 MHz Pentium 3 processor or equivalent
RAM	256 MB
Hard disk space	Minimum 3 GB and more if records and configuration are stored locally.
Monitor display	800 x 600, 256 colors
Avaya Switcher II	For Agent Greetings in the Another Phone (Dual Connect) and Desk Phone (Shared Control) modes

Hardware specifications for users having media usage

Users having media usage and requiring My Computer connection mode (VoIP) with Video, Desktop Sharing, and IM must have the following client hardware recommendations:

Processor	1.5 GHz Pentium 4 processor or equivalent
RAM	1 GB
Hard disk space	Minimum 3 GB and more if records and configuration are stored locally. Larger the disk space, better is the media performance especially in VoIP.
Monitor display	800 x 600, 256 colors
Universal Serial Bus	USB 2.0
Video codecs	H.261, H.263, or H.264 up to VGA resolution (required only if you are using video)
Web camera	List of supported web cameras and products required for use the video features is available in Video requirements on page 10.
Avaya Switcher II	For Agent Greetings in the Another Phone (Dual Connect) and Desk Phone (Shared Control) modes

Headset or headphones (For My Computer mode)

Avaya recommends the following USB headsets for use with Avaya one-X Agent. The list is in no particular order.

- Avaya AVD100 Mono PC Headset
- Avaya AVD300 Stereo PC Headset
- Avaya AVD400 Folding Stereo PC Headset

- Avaya AVD500 Multimedia Stereo PC Headset
- Clarisys i750 USB Internet Phone

You can also use the following analog headsets:

- Avaya AVA50 Mono PC Headset
- Avaya AVA60 Stereo PC Headset
- Avaya AVA80 Folding Stereo PC Headset
- Avaya AVA90 Multimedia Stereo PC Headset

IP Telephones (for Desk Phone mode)

Avaya one-X Agent supports the Avaya series phone. The following are the telephone types that are available on Communication Manager and officially supported for use with Avaya one-X Agent:

- Avaya 24xx series
- Avaya 46xx series
- Avaya 64xx series
- Avaya 96xx series (except 9610)
- Clarisys i750 USB Internet Phone

 **Note:**

You can use the 16xx series phones with Avaya one-X Agent as long as they have been provisioned as 46xx series phones on Communication Manager.

Sound card (For My Computer mode)

The computer must have a full-duplex sound card. Avaya recommends the following sound cards for use with Avaya one-X Agent. The list is in no particular order.

- Creative Labs - Live
- Creative Labs - Audigy
- Creative Labs - Audigy 2

You can download the latest drivers for these sound cards from the Creative Labs Customer Support Web site.

 **Note:**

Using splitters with any of these sound devices may result in poor audio quality.

Video requirements

Avaya Video Telephony Solution provides a point-to-point communication capability for agents in a contact center. Avaya Video Telephony Solution uses a single IP network for voice and video applications, therefore, provides the ability to use the video feature in the office, home, or on the road.

Avaya Video Telephony Solution is an optional Avaya one-X Agent feature and requires the Communication Manager Remote Feature Activation (RFA) license. For information about this license requirement, see [License requirements](#) on page 12.

 **Note:**

Avaya one-X Agent supports video with H.323 in the My Computer and Desk Phone modes. For more information about the video features, see the Avaya Video Telephony Solution deployment guide, which is available on the Avaya Web site at:

<http://www.avaya.com/support>

Communication Manager

Avaya Video Telephony Solution features differ depending on the Communication Manager release because video is part of Communication Manager. Communication Manager 3.x or later is the minimum requirement for video support.

Web camera

You can use any of the following USB cameras with Avaya one-X Agent:

- Camera Logitech QuickCam® Communicate MP(S5500)
- Logitech QuickCam® Ultra Vision
- Logitech QuickCam® Pro 9000
- Microsoft VX-3000
- Microsoft VX-6000
- Creative® WebCam Live!® Motion

You can find additional information about the video products from the following resources:

- For the most current list of supported Web cameras, go to the Avaya Web site:
[http:// www.avaya.com/support](http://www.avaya.com/support)
- For information about the supported Web cameras, go to the manufacturer's Web site.
- Ensure that your personal computer meets the system requirements for your Web camera.

Network connection requirements

You can use a Local Access Network (LAN), Digital Subscriber Line (DSL), or broadband connection to set up the network. The following list provides the network requirements for each configuration type:

My Computer configuration	A single network connection between a personal computer and a Communication Manager.
Desk Phone configuration	A network connection and a telephone connection DCP or PSTN telephones.

IP Telephone and Avaya Telephone-IP configurations	A network connection for a personal computer and a network connection for the IP telephone.
Avaya Telephone-DCP configurations	A network connection and a DCP telephone connection.

 **Tip:**

Avaya provides in-depth and informative documents that define and describe all aspects of networking and how those aspects can affect the VoIP communication. You can retrieve these documents from the Avaya Web site at:

[http:// www.avaya.com/support](http://www.avaya.com/support)

License requirements

Avaya controls the use of Avaya one-X Agent and the optional Avaya Video Telephony Solution through licenses. You must purchase licenses for these products in order to use them.

Avaya one-X Agent license requirement

Before installing Avaya one-X Agent, ensure that the system administrator has registered Communication Manager with the Avaya one-X Agent registration limit in the Communication Manager Remote Feature Activation (RFA) license. Avaya one-X Agent registration limit is automatically included in all Communication Manager R4.0.4 RFA licenses generated after January 8, 2008 and is automatically included in all Communication Manager R5.x RFA licenses.

Avaya Video Telephony Solution license requirements

Avaya Video Telephony Solution is an optional Avaya one-X Agent feature that is controlled in the Communication Manager RFA license. You only need this license if you are using the Avaya one-X Agent video feature. Avaya one-X Agent supports video only in the H.323 mode. Each Avaya one-X Agent station administered on Communication Manager requires one RTU License for the Maximum Video Capable Avaya one-X Agent Endpoints feature. These licenses are included in all Communication Manager RFA licenses.

Chapter 3: Avaya one-X Agent installation checklist

As Avaya one-X Agent interacts with many different products and services, you need to plan for a successful installation. Use this checklist to plan your activities. This check list makes sure that all requirements are in place for an error-free installation.

#	Task	Description	✓
1	Determine how your enterprise will deploy Avaya one-X Agent.	The deployment option may include telephony protocol, feature set, usage mode, and Communication Manager. Avaya one-X Agent supports video with H.323 in the My Computer and Desk Phone modes. For details, see Enterprise requirements on page 7.	
2	Ensure that all product licenses are in place.	Avaya controls the use of Avaya one-X Agent and the optional Avaya Video Telephony Solution through licenses. You must purchase licenses for these products in order to use them. For license information, see License requirements on page 12.	
3	Download the software package from the Avaya support site.	The Avaya one-X Agent software download package is available on the Avaya Support Web site at http://www.avaya.com/support . For software requirements, see Software requirements on page 7.	
4	Ensure that the end user and enterprise environments can support Avaya one-X Agent.	For the installation option, consider the following: <ul style="list-style-type: none"> • Is the required hardware in place? For hardware requirement, see Computer and 	

#	Task	Description	✓
		<p>other hardware requirements on page 8.</p> <ul style="list-style-type: none"> • Have all related Avaya software products been installed and administered correctly? For Avaya software requirements, see Software requirements on page 7. • Have all related third-party software products been installed and administered correctly? For third-party software requirements, see Software requirements on page 7. • Have you verified that your infrastructure is ready for video telephony? For more information, see the Avaya Video Telephony Solution deployment guide, available on the Avaya Web site at http://www.avaya.com/support. 	
4	Administer Avaya one-X Agent feature on Communication Manager.	Ensure that your system administrator has configured Communication Manager to support extension assignments, IP connectivity, telephone types, video, and other settings. For details, see <i>Administering Communication Manager for Avaya one-X Agent</i> .	
5	Determine how you will distribute the Avaya one-X Agent software to your employees.	<p>You can:</p> <ul style="list-style-type: none"> • Use a tool such as the Microsoft Software Management Server 	

#	Task	Description	✓
		<p>(SMS) for silent installations.</p> <ul style="list-style-type: none"> • Use a customer installation process that requires end users to manually install the Avaya one-X Agent and other related software. 	
6	Begin the installation process.	Avaya one-X Agent installation is available for personal computer and Windows Server environments. For steps, see Installing Avaya one-X Agent on page 17.	
7	Start Avaya one-X Agent.	You must register your telephone extension with the Communication Manager system to configure your system preferences.	
8	Complete the initial administration.	After completing the installation, you must configure your system and agent preferences. The basic administration settings are available in Setting up the initial configuration on page 31.	

Chapter 4: Installing Avaya one-X Agent

You or your system administrator can install Avaya one-X Agent manually or silently in a network environment that supports the H.323 protocol.

The manual installation allows you to run the installation setting through an installation wizard. Your enterprise's end users will manually download and install all required software onto their personal computers.

The silent installation allows you to run the standard install settings through a command line interface (CLI). Your enterprise's system administrator tests and installs the Avaya one-X Agent installer software. In addition, you can customize the Avaya one-X Agent configuration file to meet the company's needs and push the customized configuration files in the installation file through the CLI installation.

Installing Avaya one-X Agent manually

Prerequisites

- If you plan to install Avaya one-X Agent with video and if Avaya IP Softphone with video or one-X Communicator with video is installed on your computer, you must uninstall the Polycom video installed with either of the products and install the Polycom video with the installer supplied with Avaya one-X Agent. Refer to [.Removing existing software](#) on page 55 for more information.
- Ensure that Microsoft .Net Framework 3.5 SP1 has been installed on the personal computer.
- If you plan to use Click-to-Dial using Firefox, then ensure that Firefox is installed before installing Avaya one-X Agent.

-
1. Using a Windows Explorer to navigate to the directory containing the Avaya one-X Agent software.
 2. Double-click the OneXAgentWIXSetup.msi file. This starts the installation wizard and displays the welcome page.
 3. In the welcome page, click **Next**. This displays the User Information page.
 4. Enter your name and organization name in **Full Name** and **Organization** fields respectively. Avaya one-X Agent uses this information to provide user feedback.
 5. On the User Information page, click **Next**. This displays the Destination Folder page.

6. Enter the location where you want to install Avaya one-X Agent in the Destination Folder page.
7. Click **Next** on the Destination Folder page. This displays the Central Management Information page.
8. If Central Management is installed for Avaya one-X Agent:
 - a. Select **Enable Central storage of profile information** check box.
 - b. Enter the Central Management server IP address and port number in **Central Management Host** and **Central Management Port** fields respectively.

This step is optional and you can still install Avaya one-X Agent without selecting **Enable Central storage of profile information** check box.

9. In the Central Management Information page, click **Next**. This displays the one-X Agent Options page.

The check-boxes displayed on one-X Agent Options page are described in the following table. None of the options are selected by default.

Options	Description
Use windows credentials to login to Central Management/ Presence servers	Select this option if you are using Single sign-on, which requires additional LDAP configuration, to be able to log on to Central Management and/or Presence Services using the windows credentials.
Enable Tutorials	Select this option to install help with tutorials. Leave this check box cleared to install help without tutorials. In either case, help is presented in HTML and PDF formats.
Enable Click to Dial in Internet Explorer	Select this option to enable Click-to-Dial support in Internet Explorer.
Enable Click to Dial in Mozilla Firefox	Select this option to enable Click-to-Dial support in Firefox. This option is displayed only if Firefox is installed on your computer.

10. Select the appropriate options in one-X Agent Options page and click **Next**. This displays the Video Information page.
11. To enable the video in Avaya one-X Agent , select the **Enable Video** check box in the Video Information page. The **Enable Video** appears enabled only if correct version of Polycom Video is installed and detected on your computer.
12. To proceed with Avaya one-X Agent installation, click **Install**. This will begin the Avaya one-X Agent installation and the wizard displays a progress bar. After the

installation is complete, the Completed the Avaya one-X Agent Setup Wizard page is displayed.

13. To start Avaya one-X Agent immediately after you exit the wizard, select **Launch one-X Agent when setup exists** on the Completed the Avaya one-X Agent Setup Wizard page.
14. Click **Finish** on the Completed the Avaya one-X Agent Setup Wizard page. This completes the Avaya one-X Agent manual installation.

Upgrading Avaya one-X Agent to Release 2.0

The Avaya one-X Agent installer automatically upgrades any of the following versions already installed on your system to Release 2.0:

- Avaya one-X Agent Release 1.0
- Avaya one-X Agent Release 1.0, SP1

However, do not try to upgrade between build versions of the Release 2.0, as Avaya one-X Agent installer does not support that and displays errors while logging in.

Migrating profiles after an upgrade

If the installer performs an upgrade during the installation, Avaya one-X Agent 2.0 displays a message stating `Would you like to migrate your configuration?` when you log on to Avaya one-X Agent for the first time.

Click **Yes** on the message window to migrate all your profiles from the earlier release (1.0 or 1.0, SP1) to the newly installed Avaya one-X Agent Release 2.0. All your profiles are migrated to the appropriate location for Release 2.0.

There are certain exceptions when the migration of profiles does not take place:

Exceptions

The automatic migration does not happen if Release 1.0 was installed with **Enable sharing of one-X Agent configuration with other users on this machine** option enabled and if there are any shared profiles stored on your system.

To overcome this constraint, copy the *Profiles* directory from the following source to destination location:

Source: `C:\Documents and Settings\\Application Data\Avaya\one-X Agent\1.0\`

Destination: `C:\Documents and Settings\\Application Data\Avaya\one-X Agent\2.0\`

Central Management is a new feature of Avaya one-X Agent 2.0. If you have enabled **Enable Central storage of profile information during your installation**, profiles need to be created in Central Management and then made available to you after you log on to

Avaya one-X Agent. Therefore you cannot use the profiles created in the Release 1.0 or 1.0, SP.

Installing Avaya one-X Agent silently

You can install Avaya one-X Agent through an automated package distribution tool that makes use of the Microsoft Windows Installer service. The Avaya one-X Agent installer packages contain the MSI Installer. To pass custom (user-defined) properties to the MSI installer, you must extract the MSI installer image from the Avaya base package installers.

The silent installer runs the Avaya one-X Agent installation with the following features:

- H.323 protocol
- Avaya Video Telephony Solution
- Microsoft Internet Explorer
- Mozilla Firefox
- Polycom video

All options available in GUI install can be configured in the silent install. The `msiexec` utility of the Windows installer can be used to install Avaya one-X Agent with the default options or with specific options, as described in the following procedures.

-
1. Open the command prompt and navigate to the folder where you have copied the Avaya one-X Agent installer.
 2. To install Avaya one-X Agent with default options, run the following command from the command prompt:

```
msiexec /i OneXAgentWISetup.msi /qn
```

3. To install Avaya one-X Agent with specific options, you must provide appropriate property values for each option that you install through the command line. The properties are described in the following table.

Property	Description
INSTALLLOCATION	Requires full path to the directory where you want to install Avaya one-X Agent.
USERNAME	Sets the agent user name.
COMPANY NAME	Sets the name of your company.
INSTALLTUTORIALS	Installs help with or without tutorials.

Property	Description
	Set its value as 1 to install help with tutorials.
ENABLECLICKTODIALIE	Enables Click-to-Dial feature in Internet Explorer. Set its value as 1 to enable the feature in Internet Explorer.
ENABLECLICKTODIALFF	Enables Click-to-Dial feature in Firefox. Set its value as 1 to enable the feature in Firefox.
ENABLEVIDEO	Enables video in Avaya one-X Agent. Set its value as 1 to enable video.
LAUNCHAPPONEXIT	Starts Avaya one-X Agent immediately after installation. Set its value as 1 to start Avaya one-X Agent immediately after installation.
USESINGLESIGNON	Enables single sign-on (SSO) for Avaya one-X Agent. Set its value as 1 to allow users to perform a single sign on.
ENABLECENTRALSTORAGE	Enables central storage of agent profiles and configuration. Agents can make changes to their profiles and configurations through the Avaya one-X Agent UI. Set its value as 1 to enable the central storage of the configuration.
CENTRALMANAGEMENTURI	Sets the storage path of the central location where agent profiles and configuration will be stored. Set its value as <code>https://<host>/oneXAgentCM/client/</code> , where <host> is the IP address of the Central Management server.

Run the following command to install Avaya one-X Agent with specific options:

```
msiexec /i OneXAgentWISetup.msi /qn <property>=<property value>
```

 **Note:**

If you plan to install Avaya one-X Agent using a push mechanism, there are several options to push the Polycom and Avaya one-X Agent MSI files to the agent's computer. Once the file is copied to the agent's computer, you can use a custom script to install the software on other agent computers. Please involve your technical experts in this as Avaya does not support such an installation.

Customizing the install

Since Avaya provides an MSI file to install Avaya one-X Agent, it is easy to customize the installation. There are several free tools that you can use to customize MSI. One of the free tools available from Microsoft is Orca. Orca is freely distributed with the Windows SDK.

Installing the Polycom video software

Video is an optional feature for Avaya one-X Agent. If you intend to make and receive video calls with Avaya one-X Agent, you must install the web camera and its driver on your personal computer and install the Polycom video software. The video software is available with the Avaya one-X Agent installation package. For information on video requirements, see [Video requirements](#).

-
1. Install your Web camera and its driver.
For detailed procedure to install the Polycom Video software, refer to the installation guide provided with your Web camera.
 2. Navigate to the directory containing the Polycom Video installer.
 3. Double-click **Polycom Video Setup**.
 4. Follow the on-screen instructions on the installation wizard to complete the setup.
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Administration and configuration of Avaya one-X Agent using XML

Administrators can use this information to configure Avaya one-X Agent for large number of agents and in contact centers handling a variety of portfolios. This information helps to minimize

the efforts of creating profiles individually and also optimizes the installation and configuration for Avaya one-X Agent administrators.

Profile setting

A profile is a collection of pre-configured settings and preferences. Agents use profiles to load the pre-configured settings, such as Home, Office, Sales, Support, and so on. A profile contains configuration files that are stored locally inside a subdirectory of the main configuration.

Typically, the configuration files are located at: `\Program Files\Avaya\Avaya one-X Agent\<<profile name>`.

In the path, `<profile name>` represents the actual name given to the agent profile and same appears as the directory name. If no profile exists, Avaya one-X Agent creates a default profile.

Preparing agent configuration

The configuration files are XML files saved inside the profile subdirectory at the location described under Profile setting. Avaya provides XSD files that administrators can use to configure Avaya one-X Agent. The following table shows the UI screen settings, their related XML configuration files and the corresponding XSD.

System Settings (UI settings)	Configuration XML	Corresponding XSD	Remarks
System Settings controls			
Login	Settings.XML	Settings.XSD	
Phone Numbers	Settings.XML	Settings.XSD	
Work Handling	Settings.XML	Settings.XSD	
Greeting triggers	AudioGreetings.XML	Phone.XSD	
VuStats	Stored internally	Phone.XSD	
Screen Pop	ScreenPops.XML	ScreenPop.XSD	
Launch Application	Settings.XML	Settings.XSD	
Directory	Settings.XML	Settings.XSD	
ContactLog	Settings.XML	Settings.XSD	Controls the settings for Contact Log. ContactLog.XML contains the data.
Voice Mail Integration	Settings.XML	Settings.XSD	
Reason Codes	WorkReasonCodes.XML	ReasonCode.XSD	

System Settings (UI settings)	Configuration XML	Corresponding XSD	Remarks
	AuxReasonCodes.XML		
	LogoutReasonCodes.XML		
Event Logging	Log4net.XML	No XSD	Apache log4net configuration.
Outlook Contacts	Settings.XML	Settings.XSD	
Dialing Rules	Settings.XML	Settings.XSD	
Touch Tone Shortcuts	TouchToneShortcuts.xml	Phone.XSD	
Profiles	Profiles.XML	Profiles.XSD	Profiles.XML stores the selected profile.
Agent Preferences settings			
Audio	Stored Internally	Phone.XSD	
Video	Settings.XML	Settings.XSD	Some of the settings are stored internally
Call Handling	Settings.XML	Settings.XSD	
Agent Greetings	AudioGreetings.XML	Phone.XSD	
Instant Messaging	Settings.XML	Settings.XSD	
Dialpad window settings			
Selected Feature Buttons	SelectedPhoneFeatures.xml	Phone.XSD	
User Interface	Preferences.XML	Preferences.XSD	

The aforementioned XSD files can be downloaded from <http://support.avaya.com>.

Controlling agent permissions

Administrators can set attributes to control agent permissions. Most UI settings have a ReadOnly attribute. If ReadOnly is set to true, agents cannot change the settings for the

corresponding field on the UI. ReadOnly attribute works hierarchically, which means the attribute value set for parent applies to all its children elements. This provides granularity to control agent permissions.

For example, as an administrator if you want to protect individual applications from **Launch Application**, you can set ReadOnly attribute as true. This would still allow agents to add a new launch applications. On the contrary, to prevent agents from adding any applications, set the ReadOnly attribute to true for parent of all Launch Applications. This prevents agents from adding Launch Application configuration.

Publishing the configuration to agent's computer

After creating the default XML files, administrator can modify the MSI package to include the configuration files. Files should be added to the Application folder of the MSI. The Application folder goes into the Installation folder when Avaya one-X Agent is installed (for example, C:\Program Files\Avaya\OneXAgent). At this stage the MSI contains the default Settings.XML.

When an agent logs into a profile and if any configuration file is missing in that profile, system copies the required file from the Install directory to the profile. If the required file is not found in the Install directory, the system creates a default empty configuration file as required.

Since Station login/Agent login and passwords in Settings.XML are unique for every agent, their values must be cleared. If Avaya one-X Agent is installed on a system with IP Agent is installed, Avaya one-X Agent can import Login Contacts/Contact Log settings. Dialing Rules cannot be imported. This import happens after the settings files are copied from the Install directory. The imported files replace the existing configuration files. Alternatively, these configuration files are pulled into agent's computer using Windows Roaming Profiles. Avaya recommends using Windows Roaming profiles to deliver the configuration. This is a better approach, if you plan to publish User Name/Passwords in Settings.XML. Contact Avaya Support for encryption of passwords.

Chapter 5: Getting started

This section describes how to log on to Avaya one-X Agent Release 2.0. The procedure to log on depends on the configuration of Avaya one-X Agent deployed in your network and the type of authentication supported. The two types of authentication are described below.

Basic authentication

In basic authentication, your user credentials get authenticated against the servers, namely Communication Manager, Central Management, and Presence Services, deployed in your network. In case of an authentication failure on Central Management or Presence Services, Avaya one-X Agent logs you on with the basic telephony features.

Single sign-on

In this type of authentication, you can log on to your enterprise network and Avaya one-X Agent with the same user credentials. You do not need to provide separate user credentials to log on to Avaya one-X Agent.

In this section, you will learn how to launch the Avaya one-X Agent application on your personal computer, log in as an extension, and register as an agent.



Important:

To enable Single Sign-on, Central Management and Presence Services must be configured for Avaya one-X Agent.

Logging on to Avaya one-X Agent

You must register your station with Communication Manager to configure your system preferences, make and receive direct calls or to sign in as an agent. The system logs you in automatically if you have enabled automatic registration in the **System Settings** panel.

If you have Avaya IP Agent or Avaya IP Soft phone already installed, your login credentials, contact lists, and contact logs can be imported when you log in to Avaya one-X Agent for the first time. Avaya one-X Agent shows an Import Settings from IP Agent/IP Softphone dialog box when you log in for the first time. You can choose **Import Login Settings**, **Import Call History**, and **Import Contacts** on the dialog box. Avaya one-X Agent detects the database file and shows the path in the **Database File** field. Whatever you choose to import is displayed in the relevant windows on Avaya one-X Agent. However, make sure you have logged out of Avaya IP Agent or Avaya IP Soft phone while importing the relevant details.

Use the following steps to log on to Avaya one-X Agent. Before logging on to the application, obtain the following user credentials from your system administrator:

- User authentication ID and password
- Extension and password

- Agent Login ID and password
- IM user name and password

 **Note:**

- If Presence Services are not installed, IM user name and password are not required.
- For installations without Central Management, all the above credentials except User authentication ID and password are required.

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1. Launch Avaya one-X Agent on your personal computer. This displays the User Authentication window if you are not using Single sign on.
 2. Enter your ID and password on the User Authentication window. This step is not required if you are using Single sign on or if Central Management is not installed as a part of server installations and you will directly see the Welcome window after you launch Avaya one-X Agent.

The Welcome window may display a welcome message or an important instruction configured through Central Management, provided Central Management is installed as a server component.

You can complete the initial configuration using the Welcome window menu, when you launch Avaya one-X Agent on your personal computer for the first time. The initial task may include configuring your agent settings, defining your user profile, or setting the dialing rules. To configure the basic settings, see [Setting up the initial configuration](#) on page 31.

3. On the Welcome window, click **OK**. This displays the Login window.
 - If you have enabled automatic registration settings in the **System Settings** Login panel, the system logs you on to Avaya one-X Agent automatically.
 - If you have not enabled automatic registration settings in the **System Settings** Login panel, you need to enter your user credentials for each of the subsequent login windows.
 - If you have multiple user profiles, the system prompts you to choose an appropriate profile from the Profile window. You must choose a profile to proceed.
4. On the Login window:
 - a. In the **Extension** field, enter the telephone extension number.
 - b. In the **Password** field, enter the password.
 - c. Click **Log in**. This shows the Agent Sign In to ACD window.
5. To make and receive ACD calls, you must log on to the ACD server using the agent extension. On the Agent Sign In to ACD window:

- a. Enter the agent login ID in **Agent** field.
 - b. Enter the password in the **Password** field.
 - c. Click **Log in**. This shows the Connect to IM Server window. Connect to IM Server window is not displayed if Presence is not a part of your deployment. In such case you are directly logged on to Avaya one-X Agent after this step.
6. On the Connect to IM Server window:
- a. Enter your IM user name in **User Name** field.
 - b. Enter the password in the **Password** field.
 - c. Enter the IM server domain name in the **Domain** field.
 - d. Click **Log in**. This launches the application and logs you on to Avaya one-X Agent.

 **Note:**

The respective details appear as you log on to Avaya one-X Agent.

If you have logged into Avaya IP Soft Phone, a warning message is displayed. You need to log out to be able to import contact logs into Avaya one-X Agent.

Chapter 6: Setting up the initial configuration

If you are an agent working from multiple locations and not an Avaya Central Management provisioned user (from the contact center, from your home, or from a different location), you must change your settings each time you change locations. This section describes how to configure various settings after logging in to Avaya one-X Agent.

 **Important:**

You may not have permission to change, add, delete, or configure some of the features in the application as these features may have been restricted at the enterprise level. These restricted features are visible, but grayed out.

Configuring phones for different locations

You can perform day-to-day tasks from the contact center, at home, or while traveling by registering Avaya one-X Agent with Communication Manager.

You can select an appropriate configuration that optimizes the voice endpoints and network connectivity requirements of your current location. You need not change the configuration, as long as you do not access the contact center from any other location. However, if you work from multiple locations (from the contact center, from your home, or from a different location), you must configure Communication Manager IP on Avaya one-X Agent to connect to the correct Communication Manager each time that you change locations.

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

- My Computer
- Desk Phone
- Another Phone

This section lists the minimum requirements and provides steps to set up each configuration. If you are not sure about the configuration type, contact your system administrator.

Setting up the My Computer configuration

The My Computer configuration uses an IP connection to connect to Communication Manager for data path and VoIP for voice path. The configuration does not use an analog or an IP telephone, which, obviously, is valuable when a physical telephone is not available. You can

make or receive voice calls through Avaya one-X Agent using a headset connected to your personal computer.

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

Prerequisites

- Network connection from a personal computer running the Avaya one-X Agent application to Communication Manager.
- Network interface card for connectivity to Communication Manager and a sound card (full-duplex recommended).
- An USB-compliant headset connected to the personal computer (recommended), or a personal computer microphone and speakers, or a headset with a microphone connected to the mini connectors.
- Telephone extension number, password, and Communication Manager address.

Use the My Computer configuration when you are traveling and need to access Communication Manager through the Internet. You can configure the My Computer setting for VoIP either through the Login window or through the System Settings dialog box.

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1. On the top bar, click **System Options > System Settings** .
 2. In the System Settings dialog box, **Login** panel is displayed by default with the **Telephony** tab.
 3. In the **Telephony** tab:
 - a. Select the **Enable automatic connection to CM** option if you want the system to connect to Communication Manager automatically using the last successful registration.
 - b. In the **Extension** field, specify the telephone extension number if you want Communication Manager to identify your telephone extension number each time you log in to the system.
 - c. In the **Password** field, specify the password for the associated telephone extension number.
 - d. Select **Save password during sign in** if you want the system to save the password when you are signing in with the associated extension number.
 - e. If the extension has been administered on Communication Manager to support Auto Answer, select the **CM Auto Answer Support Required** option.
 - f. In the **Server Address** field, enter the IP address of Communication Manager.
 - g. Select the appropriate **License Type**.

The **Basic** license supports only **Desk Phone** as the device to place and receive calls. Therefore, to set **Place and receive calls using** field as **My Computer**, make sure that your **License Type** selection is not set to **Basic**.

h. In the **Place and receive calls using** drop-down field, select **My Computer**.

4. Click **OK**.

The system applies the new changes in the next login.

Setting up the Desk Phone configuration

The Desk Phone configuration uses an Avaya IP/DCP telephone for voice path and an Avaya one-X Agent to share control of the same administered station using the same button layout and features. You access audio components from your office phone and visual components from your personal computer.

Prerequisites

- Network connection from a personal computer running the Avaya one-X Agent application to Communication Manager.
- Avaya DCP or IP telephones capable of receiving calls from Communication Manager.
- Network interface card for connectivity to Communication Manager.
- Desk phone extension number, password, and Communication Manager server address.

Use the Desk Phone configuration when you are at the contact center and want to share the control between the office telephone and your personal computer. While registering as a Desk Phone with Communication Manager, you must register the desk phone number as the extension number. You can configure the Desk Phone setting either through the Login window or through the System Settings dialog box.

1. On the top bar, click **System Options > System Settings** .
2. In the **System Setting** dialog box, click **Login**.
3. In the **Telephony** tab:
 - a. Select the **Enable automatic connection to Communication Manager** option if you want the system to connect to Communication Manager automatically using the last successful registration.
 - b. In the **Extension** field, specify the desktop extension number if you want Communication Manager to identify your telephone extension number each time you log in to the system.
 - c. In the **Password** field, specify the password for the associated desktop extension number.

- d. Select **Save password during sign in** if you want the system to save the password when you are signing in with the associated extension number.
 - e. If the extension has been administered on Communication Manager, select the **CM Auto Answer Support Required** option.
 - f. Select the appropriate **License Type**. If you select **Basic**, the **Place and receive calls using** field is set to **Desk Phone** and is disabled.
The **Basic** license supports only **Desk Phone** as the device to place and receive calls. If you select **Basic** as the **License type**, the **Place and receive calls using** field is set to **Desk Phone** by default and is disabled.
 - g. In the **Place and receive calls using** drop-down field, choose **Desk Phone**.
4. Click **OK**.
The system applies the new changes in the next login.
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Setting up the Other Phone configuration

The Another Phone configuration registers with Communication Manager as an off-site agent through a telephone and an IP connection. The telephone can be a PSTN telephone, a cellular telephone, or an extension on a local or remote switch. The Another Phone configuration uses an IP connection to connect to a Communication Manager and a PSTN connection to make or receive calls.

Prerequisites

- Network connection from a desktop computer running Avaya one-X Agent to Communication Manager.
- Any telephone capable of receiving calls from Communication Manager.
- Communication Manager connection, one user connection for signaling connection and the other for off-site use, one trunk connection, or for on-site use, an additional user connection.
- Telephone extension number, password, and the Communication Manager server address.
- Telephone numbers to be configured as **Other Phone** must be added on the **Phone Numbers** panel. Refer [Adding a new phone number](#) for information on adding phone numbers.

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

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1. On the top bar, click **System Options > System Settings** .
 2. In the System Settings dialog box, click **Login**.
 3. In the **Telephony** tab:
 - a. Select the **Enable automatic connection to Communication Manager** option if you want the system to connect to Communication Manager automatically using the last successful registration.
 - b. In the **Extension** field, specify the telephone extension number if you want Communication Manager to identify your telephone extension number each time you log in to the system.
 - c. In the **Password** field, specify the password for the associated telephone extension number.
 - d. Select **Save password during sign in** if you want the system to save the password when you are signing in with the associated extension number.
 - e. If the extension has been administered on Communication Manager, select the **CM Auto Answer Support Required** option.
 - f. In the **Server Address** field, enter the IP address of Communication Manager.
 - g. Select the appropriate **License Type**.
The **Basic** license supports only **Desk Phone** as the device to place and receive calls. Therefore, to set **Place and receive calls using** field as **Other Phone**, make sure that your **License Type** selection is not set to **Basic**.
 - h. In the **Place and receive calls using** drop-down field, select **Other Phone**.
 - i. In the **Telephone At** field, enter the telephone number you want to use for voice calls.
If you are using a telephone number repeatedly, such as a home telephone number, you must add another number.
 4. click **OK** to save the settings.
The system applies the new changes in the next login.
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Configuring the agent settings

Prerequisites

Obtain the agent extension number and password from your system administrator.

1. On the top bar, click **System Options > System Settings** .
2. In the Login Settings dialog box, click the **Agent** tab.

3. In the **Agent** tab:
 - a. Select the **Automatically sign into the ACD server** to register the agent extension with the ACD server automatically with the previous successful registration through Communication Manager.
 - b. In the **Agent** field, specify the agent extension number if you want the ACD service to identify your agent extension number each time you log in to the system.
 - c. In the **Password** field, specify the password for the agent extension number.
 - d. Select **Save password during sign in** if you want the system to save the password when you are signing in as an agent with the associated agent extension number.
 - e. In the **Default Agent state upon ACD connection** drop-down field, choose the appropriate option.
 4. Click **OK**.
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Configuring IM settings

Prerequisites

Obtain your IM user name and password, domain name, and IM server IP address from your supervisor or system administrator before you configure IM settings.

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1. On the top bar, click **System Options > System settings** .
 2. On System Settings dialog box, click **Login > IM** tab.
 3. On **IM** tab, select **Enable IM Login** check box to enable instant messaging. Once you have selected this check box, you need to provide the user credentials required to log on to Avaya Presence Services.
 4. Select **Enable automatic connection to IM server** check box to if you want to automatically connect to IM server with the last successful registration. This step is optional.
 5. Enter the IM user ID, password, and domain name in **User Name**, **Password**, and **Domain** fields respectively.
 6. Select **Save password during sign in** check box if you want to save the credentials for subsequent log in.
 7. Enter the IM server IP address in **Server Address** field.
 8. Click **OK**.
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Setting up the dialing rules

The dialing rules depend on the country and location of your Communication Manager. The dialing rules help the system to distinguish extensions from trunk calls, based on the length of the dialing string. It ensures that the system uses the right Automatic Route Selection (ARS) code, and if needed, modifies the digits in keeping with Communication Manager and the PSTN requirements.

Use dialing rules when you want the system to dial the correct digit sequence to register the settings with your Communication Manager.

Tip:

For traveling agents visiting a different location and needing to register with a different Communication Manager, Avaya recommends defining a user profile with appropriate dialing rules for that location and using a login with the corresponding profile so that the dialing rules for the system do not change.

Note:

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

Use the following steps if you are a travelling agent using Avaya one-X Agent from a different location, and want to register the settings with a different Communication Manager.

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1. On the top bar, click **System Options > System Settings** .
 2. In the System Settings dialog box, click **Dialing Rules**.
 3. In the **Dialing Rules** panel:
 - a. In the **Number to dial to access outside line** field, specify the number required to dial to access your outside line.
You may have to dial '0' or '9' (or another number) to get an external line.
 - b. In the **Your Country Code** field, specify the country code of your Communication Manager. For example, type 1 if you are accessing your Communication Manager from the United States.

Note:

In the context of the Communication Manager, the country code is called as the ARS access code.

- c. In the **Your Area/City Code** field, type the area or city code of your Communication Manager. For example, type 415 if you are accessing the Communication Manager located at San Francisco.
- d. In the **Number to dial for long distance calls** field, type the long distance prefix number of your Communication Manager.

- e. In the **Number to dial for international calls** field, type the international prefix.
- f. In the **Length for internal extension calls** field, type the length of the internal extension calls. For example, if your internal extensions consist of five digits, enter 5. If you specify the multiple extension lengths, Avaya one-X Agent performs the exact matches.

When you assign the length of the internal extension number, Avaya one-X Agent treats the dialed number consisting of the selected number of digits as an internal extension.

Your Communication Manager may have multiple length extension numbers, for example, if your company supports internal three-digit, five-digit, and seven-digit extensions, type 3, 5, 7. You must use a comma to separate the values.

- g. In the **Length of national phone numbers including City/Area code** field, type the length of the number for internal extension calls. This number should also include the code used to identify a city or an area.
- h. Select **Include area/city code when making a local call**, if area code should be prefixed with a number when making a local call. For example, if you dial a telephone number, the system prefixes the area code number defined in the **Your Area/City Code** field and dials the telephone number.
- i. Select **Display confirmation window before dialing a number**, for confirmation before dialing.

- 4. Click **OK** to save the settings.
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Configuring the Work Handling options

Prerequisites

To be able to specify **Aux Codes** during the **Transition to Ready state** interval, Aux. Codes must be defined prior to following this procedure.

Use the Work Handling options to configure the incoming work items, to use Communication Manager settings to change the agent status (if administered), to define the agent's transition state after releasing the call, and to set the work completion options.

- 1. On the top bar, click **System Options > System Settings** .
- 2. In the System Settings dialog box, click **Work Handling**. This displays the **Work Handling** panel with **Basic** and **Advanced** tabs.
- 3. On the **Basic** tab:

- a. In the **Work Completion for ACD calls** section, define the work completion mode, as appropriate.
 - b. In the **Transitions to Ready State** section, define the agent's transition state after releasing the call.
The **With Aux Code** option gets enabled if you select the **Manual-Ready** option.
4. On the **Advanced tab** tab:
 - a. In the **Work Items** section, select the appropriate option to accept incoming work items.
Auto-Accept automatically accepts calls; however, this is not related to **CM Auto Answer Support Required** option on the Login window but provides the same functionality on the client side.
 - b. In the **Communication Manager Ready mode** section, select **Auto In** if you want Communication Manager to do the work handling, so that all work items get auto-completed. Selecting **Auto In** disables most Work Handling panel settings. If **Manual In** is selected, agent controls the work handling.
 5. Click **OK** to save the settings.
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Configuring the incoming call appearance

Use the following steps to set the incoming call notifications to display the main window, or to flash the icon on the task bar when the system recognizes an incoming call.

1. On the top bar, click **System Options > Agent Preferences** .
2. In the Agent Preferences dialog box, click **Call Handling**.
3. In the **Call Handling** panel, use any of the following options:
 - Select **Consultive Transfer** to consult the caller before transferring the call.
 - Select **Consultive Conference** to consult the second caller before adding the first caller to the conference.
 - Select **Auto-Hold** to automatically put the call on hold before transferring or conferencing the call.

- Select **Bring main window to front** if you want the system to bring the main window to the foreground and activate the window for a ringing call.
 - Select **Flash icon** if you want to view the call flashing in the task bar when the system recognizes a ringing call.
4. Click **OK** to save the settings.
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Configuring incoming instant message appearance

Use these settings to define how you want to be notified about an incoming instant message. You can also specify messages to be sent automatically as greetings when you begin IM interaction or as responses when receive to an instant message. The messages set using the this procedure are available through the **Add Response** button on the IM window.

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1. On the top bar, click **System Options > Agent Preferences** . This opens the Agent Preferences dialog box.
 2. On the Agent Preferences dialog box, select **Instant Messaging**. This displays the Instant Messaging panel with **General**, **Alerts**, and **Responses** tabs.
 3. On the **General** tab, enter your automated IM greetings in the **Greeting** field.
 4. On the **Alerts** tab, select the following options:
 - a. Select the **Display main window** check box if you want the system to display main Avaya one-X Agent window on the foreground for an incoming message.
 - b. Select the **Display IM window** check box if you want the system to display the incoming message directly in an IM window.
 - c. Select the **Flash icon** check box if you want the system to flash the one-X Agent icon to flash on the task bar for an incoming message.
 5. On the **Responses** tab, set your automated IM response using the following steps. You can record multiple responses and use them anytime during your IM interaction.
 - a. Click the **+** (plus) button to add a response.
 - b. Select the response and add the text for you automated IM response.
 - c. Repeat steps a and b to add more IM responses.
 - d. To user the IM responses, click the **Add response** button on the IM window and select the IM response and press `Enter`.
 6. Click **OK** on the Instant Messaging panel to save your settings.
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Configuring incoming TTY appearance

Use this procedure to define how an incoming TTY call must be displayed. You can also set an automated response to the incoming TTY message and specify numbers for which the TTY message window should be displayed.

1. On the top bar, click **System Options > Agent Preferences** . This opens the Agent Preferences dialog box.
2. On the Agent Preferences dialog box, select **TTY**. This displays the TTY panel with **General** and **Abbreviations** tabs.
3. On the **General** tab panel, perform the following steps:
 - a. Enter your agent greeting in the **Greeting** text box.
 - b. To display TTY window on every incoming voice call, select **Show TTY window on every voice call** check box.
 - c. To display TTY window for specific incoming voice calls, select **Show TTY window when a call comes from** check box and then specify the TTY numbers.
 - d. Perform this step if you have selected the **Show TTY window when a call comes from** check box. Click the **+** (plus) button. This adds a blank text item.
 - e. Select the blank text item and type the number for which you want the TTY window to be displayed.
 - f. To display the TTY window for every voice work item on the work list window, select **Always show TTY button in Voice interaction**.
4. On the **Abbreviations** tab, perform the following steps:
 - a. To view the preset TTY abbreviations, select any abbreviation in the list. The abbreviation details are displayed in the **Meaning**, **Literal Meaning**, and **Description** fields.
 - b. To add a new abbreviation, click the **+** button. This adds an untitled abbreviation to the list.
 - c. Select the untitled abbreviation and enter the abbreviation.
 - d. Enter a short explanation in the **Meaning** field.
 - e. Enter the expansion in the **Literal Meaning** field.
 - f. Use the **Description** field to add additional description or information on the abbreviation.

The abbreviations are displayed in rectangular boxes on the TTY window. To view the abbreviation details, you must click the abbreviation box on the TTY window. The details are displayed in a popup box on the TTY window. The recipient can also

view the same details if the same abbreviation and details are configured through the recipient's Avaya one-X Agent.

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

Setting the audio options

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

1. On the top bar, click **System Options > Agent Preferences**.
2. In the Agent Preferences dialog box, click **Audio**.
This displays the **Audio** panel with **Basic** and **Advanced** tabs. The **Basic** tab is active by default.
3. On the **Basic** tab, perform the following steps in the **Volume** section to set the basic audio settings. The steps are optional and you can skip to the required step.
 - a. Adjust the **Playback** slider to set the volume for all sound output through your computer speakers or headphones.
 - b. Adjust the **Record** slider to set the recording volume of all sound transmitted through a microphone to your personal computer.
 - c. Select the **Mute** check box adjacent to the **Record** slider to eliminate any sound being sent to your personal computer through the microphone.
These settings will not affect the headset volume if the headset is attached to a telephone rather than the personal computer.
 - d. Adjust the **Ringing** slider to set the volume of the sound played through your speakers or headset when you receive an incoming call.
 - e. Select the **Mute** check box adjacent to **Ringing** slider to eliminate any sound that indicates an incoming call.
 - f. Select **Play ringing through the internal PC speakers** to play the sound associated with an incoming call through the speakers of your personal computer and your headset simultaneously.
If your personal computer does not have an internal speaker, this option has no effect.
 - g. Select **Use Custom ringtone** to play the a custom ringtone (a Wave file) through the speaker or headset when you receive an incoming call. The wave file is played from the specified location.

When you select **Use Custom ringtone**, a **Browse** field and **Test Ringtone** button are displayed below . Use the browse field to locate the wave file and click **Test Ringtone** to test the wave file.

Refer the *Audio Basic tab field descriptions* for more information.

4. On the **Advanced** tab, perform the following steps in the **Audio Devices** section to set the advanced audio settings:
 - a. Select the audio play back hardware on your local system from the **Playback Device** list.
 - b. Select the audio recording hardware on your local system from the **Record Device** list.
 - c. To be able to test the background noise, click **Background Noise Test**.
This opens a Background Noise Test window. Click the **Test** button on that to test the background noise.

Refer the *Audio Advanced tab field descriptions* for more information.

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

Defining an agent profile

Defining an agent profile from Avaya one-X Agent client interface is only possible for deployments without Central Management. With the given procedure, you can create a local agent profile.

A profile is a collection of pre-configured settings and preferences. Using profiles, agents can switch configurations (For example, agents can create profiles for different settings such as home, Office, Sales, Support and use them as needed) reusing the same Avaya one-X Agent installation. For example, you can create an agent profile for the My Computer configuration and use the profile with the appropriate VoIP network. You can also create another agent profile from the Desk Phone configuration and use it as appropriate.

-
1. Make necessary changes using the System Settings and Agent Preferences options.
 2. On the top bar, click **System Options > System Settings** .
 3. In the System Settings dialog box, click **Profiles**.
 4. In the **Profiles** panel:
 - a. Click **Add**.
The system displays the Create Profile dialog box.
 - b. In the **Profile Name** field, enter the name for the profile and click **OK**.

The new profile appears in the Profile list.

5. Click **OK**.

The system creates a new profile and stores it locally in your personal computer. When you restart the application, the application resets the last used profile as the default profile, however allows you to choose the required profile from the list. This is provided you have created multiple profiles. If you have a solitary profile, you do not get to choose a profile at the launch of the application. You must select the appropriate profile to at the launch of Avaya one-X Agent on your personal computer.

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

Integrating the voice mail system

Avaya one-X Agent provides voice mail support for registered extensions in a voice mail system. You can integrate the voice mail system with a telephone system, a third party voice mail application, or a web-based voice mail server, and retrieve your voice mail from one of the voice mail services.

 **Important:**

The voice mail service is available only for those extensions registered with a voice mail system. If voice mail settings are not available on your extension, contact the system administrator.

-
1. On the top bar, click **System Options > System Settings** .
 2. In the left pane of the System Settings dialog box, click **Voice mail Integration**.
 3. In the **Voice Mail Integration** panel, click **Enable Message Access**.
 4. To integrate voice mail service, perform one of the following actions as appropriate:
 - To integrate voice mail services with a telephone, select **Dial this number** and specify the voice mail number in the field.
 - To integrate voice mail services through a third-party voice mail application, select **Start this application** and click **Browse** to navigate a windows executable file.
 - To integrate voice mail with a third-party web server, select **Open on web** and type a valid web address in the field.
 5. Click **OK**.
-

Activating a recorded greeting

You must activate the Record Greetings option for the system to play the greeting. You can have more than one active greeting at the same time.

For example, you can set multiple greetings to be active if each greeting has a unique Vector Directory Number (VDN) as the activation criterion. This is also true for Agent Greetings that play for specific Automatic Number Identification (ANI) telephone numbers or Prompted Digits.

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

Prerequisites

You must have at least one greeting recorded to be able to activate a recorded greeting.

-
1. On the top bar, click **System Options > System Settings**.
 2. In the System Settings dialog box, select **Greetings Triggers**.
The system displays the **Greetings Triggers** panel.
 3. In the **Greetings Triggers** list, select a greeting.
 4. Click **OK**.
You can manually play the selected greeting on the incoming call.
-

Defining a reason code

Reason code is a way to associate a particular number to a label for an agent's reason for not being at the workstation or for not accepting an ACD call. These reason codes, if defined in Communication Manager, appear on the message window when an agent changes the work status to auxiliary or logs out from the ACD service. By default, the system creates a default reason code each for auxiliary, logout and work reason code types. You can change the default reason codes, but cannot delete them.

Important:

The system administrator must define a common set of reason codes and manage it centrally. The administrator can distribute these reason code files to all agents by pushing the configuration to agent's system. Moreover, if your deployment is using Central Management, the administrator must upload a CSV file and universally assign common reason codes across the account or skill.

Defining reason codes for work

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

1. On the top bar, click **System Options > System Settings** .
2. In the left pane of the System Settings dialog box, click **Reason Codes**. This opens the Reason Codes panel on the right.
3. From the **Select menu to edit** list, select **Work Reason Codes**. A default and untitled reason code item is displayed under a **root** node in the container below **Select menu to edit** list.
You can add a singular work reason code or create a group and add a set of work reason codes in that group. Reason codes having similar or related characteristics are organized together in one group. Make sure that the labels given to the group are easy to understand the group activity.
4. To add a group, perform the following steps:
 - a. Click the **Add Reason Group** button at the bottom of the Reason Codes panel. This adds an untitled group node in the container below **Select menu to edit** list.
 - b. Select the untitled node and type the group name. The group node gets labeled with the name you type.
 - c. Follow step 5 to add reason codes to the group.
5. To add a solitary reason code, perform the following steps:
 - a. Select the node under which you want to add a reason code. This node may be the **root** node or a group node.
 - b. Click the **Add Reason Code** button. This adds an untitled reason code item under the selected node.
 - c. Select the untitled reason code item and rename it. The reason code name replaces the default name of the reason code item.
 - d. Repeat step 5 to add as many singular reason codes you want to.
6. Click **OK** to save your settings.

Work codes created using the above procedure are displayed when you click the **Work Code** icon on an active call on the Work List window. You can choose the appropriate code to assign during the active call. If you have not created any work code, the **Work Code** icon remains disabled during an active call.

**Note:**

If Central Management is used, reason codes can be defined only from Central Management. You will not be able to edit from Avaya one-X Agent application.

Defining reason codes for logging out

The log out reason code describes the reason for logging out from the ACD service. You can use the log out reason code only if you have defined reason codes in the System Settings dialog box.

-
1. On the top bar, click **System Options > System Settings** .
 2. In the left pane of the System Settings dialog box, click **Reason Codes**. This opens the Reason Codes panel on the right.
 3. From the **Select menu to edit** list, select **Log Out Reason Codes**. A default and untitled reason code item is displayed under a **root** node in the container below **Select menu to edit** list.
 You can add a singular log out reason code or create a group and add a set of log out reason codes in that group. Reason codes having similar or related characteristics are organized together in one group. Make sure that the labels given to the group are easy to understand the group activity.
 4. To add a group, perform the following steps:
 - a. Click the **Add Reason Group** button at the bottom of the **Reason Codes** panel. This adds an untitled group node in the container below **Select menu to edit** list.
 - b. Select the untitled node and type the group name. The group node gets labeled with the name you type.
 - c. Follow step 5 to add reason codes to the group.
 5. To add a solitary reason code, perform the following steps:
 - a. Select the node under which you want to add a reason code. This node may be the **root** node or a group node.
 - b. Click the **Add Reason Code** button. This adds an untitled reason code item under the selected node.
 - c. Select the untitled reason code item and rename it. The reason code name replaces the default name of the reason code item.
 - d. Repeat step 5 to add as many singular reason codes you want to.
 6. Click **OK** to save your settings.

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

Defining reason codes for auxiliary

The auxiliary reason code describes the reason for changing your state to the AUX mode. You can use the auxiliary reason code only if you have defined the reason codes in the System Settings window.

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

1. On the top bar, click **System Options > System Settings** .
2. In the left pane of the System Settings dialog box, click **Reason Codes**. This opens the Reason Codes panel on the right.
3. From the **Select menu to edit** list, select **Aux Reason Codes**. A default and untitled reason code item is displayed under a **root** node in the container below **Select menu to edit** list.

You can add a singular auxiliary reason code or create a group and add a set of auxiliary reason codes in that group. Reason codes having similar or related characteristics are organized together in one group. Make sure that the labels given to the group are easy to understand the group activity.
4. To add a group, perform the following steps:
 - a. Click the **Add Reason Group** button at the bottom of the Reason Codes panel. This adds an untitled group node in the container below **Select menu to edit** list.
 - b. Select the untitled node and type the group name. The group node gets labeled with the name you type.
 - c. Follow step 5 to add reason codes to the group.
5. To add a solitary reason code, perform the following steps:
 - a. Select the node under which you want to add a reason code. This node may be the **root** node or a group node.
 - b. Click the **Add Reason Code** button. This adds an untitled reason code item under the selected node.
 - c. Select the untitled reason code item and rename it. The reason code name replaces the default name of the reason code item.
 - d. Repeat step 5 to add as many singular reason codes you want to.
6. Click **OK** to save your settings.

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

Viewing the phone display on the main window

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

 **Note:**

Only those telephone types that are capable of displaying 80 characters are compatible with this feature.

-
1. On the top bar, click **System Options > Agent Preferences > User Interface** .
 2. In the User Interface panel enable the **Show Phone Display** option.
 3. Click **OK**.
-

Setting the toolbar buttons on the main window

Avaya one-X Agent allows you to set the toolbar buttons on the main window. These buttons provide quick-access to options including releasing a call, changing the answer settings to manual or auto, changing the agent status to ready or auxiliary, making a call to the supervisor directly, assigning a work code to the work item, and dialing the last called number.

-
1. On the top bar, click **System Options > Agent Preferences > User Interface** .
 2. In the User Interface panel:
 - a. Enable the **Display Button Toolbar** option.
 - b. Click **Select Favorite Buttons**.
 - c. In the Favorite Buttons dialog box, select the appropriate buttons.
You can select up to eight buttons from the list.
 3. Click **OK**.
-

Setting up the initial configuration

Chapter 7: Repairing Avaya one-X Agent

If Avaya one-X Agent is not functioning properly, you can use the Repair function to reinstall it. If you repair an Avaya one-X Agent application, you must also repair any service release that has been installed.

 **Note:**

If you are experiencing difficulties at the time of installing Avaya one-X Agent, capture the event and error logs and send them to your system administrator. For detailed information on logs and debugging, see *Maintaining and Troubleshooting Avaya one-X Agent* .

-
1. In **Windows Control Panel**, select **Add or Remove Programs**.
 2. In the list of currently installed programs, locate the Avaya one-X Agent application you want to repair.
 3. Click the **Click here for support information link** to display the Support Info dialog box.
 4. Click **Repair**.
The system reinstalls the program.

 **Tip:**

Alternatively, you can run the installation again. The installer prompts you with **Repair** and **Remove** options. You can select **Repair** to repair the installation.

Chapter 8: Removing the Avaya one-X Agent application

You can remove Avaya one-X Agent using both manual and silent modes.

 **Note:**

You cannot remove the read-only folders that are shared with other applications, or remove any files or directories that you have added to the Avaya one-X Agent installation directory.

Removing Avaya one-X Agent in manual mode

-
1. Close Avaya one-X Agent if it is currently running.
 2. In the **Windows Control Panel**, select **Add or Remove Programs**.
 3. Select **Avaya One-X Agent** and choose **Change, Remove, or Uninstall (Windows Vista)**.

During the removal process, the Microsoft installer may display a message to shut down an application that is running. You can shut down the specified application, or ignore the message and continue with the removal.

 **Tip:**

Alternatively, you can run the installation again. The installer prompts you with **Repair** and **Remove** options. You can select **Remove** to uninstall the application.

Removing the Avaya one-X Agent application

Chapter 9: Removing existing software

If you are using the Avaya softphones with video, and if you plan to use Avaya one-X Agent with video, then you must remove the following Avaya software from your personal computer before installing Avaya one-X Agent:

- Avaya IP Softphone
- Polycom Via Video



Note:

If you are not using the Avaya softphones with video on your personal computer, you can skip this section.

Prerequisites

Before removing the Avaya IP Softphone software, record the following information. You will need this information when you install Avaya one-X Agent:

- Your IP Softphone call server address
- Your IP Softphone login
- The password for your extension

-
1. In Windows Control Panel, select **Add or Remove Programs**.
 2. Follow the standard process for removing programs from Windows.
-

Removing existing software

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