Installing and Configuring Avaya one-X® Agent

November 2009

© 2009 Avaya Inc.
All Rights Reserved.

Notice

While reasonable efforts were made to ensure that the information in this document was complete and accurate at the time of printing, Avaya Inc. can assume no liability for any errors. Changes and corrections to the information in this document might be incorporated in future releases.

Documentation disclaimer

Avaya Inc. is not responsible for any modifications, additions, or deletions to the original published version of this documentation unless such modifications, additions, or deletions were performed by Avaya. Customer and/or End User agree to indemnify and hold harmless Avaya, Avaya's agents, servants and employees against all claims, lawsuits, demands and judgments arising out of, or in connection with, subsequent modifications, additions or deletions to this documentation to the extent made by the Customer or End User.

Link disclaimer

Avaya Inc. is not responsible for the contents or reliability of any linked Web sites referenced elsewhere within this documentation, and Avaya does not necessarily endorse the products, services, or information described or offered within them. We cannot guarantee that these links will work all the time and we have no control over the availability of the linked pages.

Warranty

Avaya Inc. provides a limited warranty on this product. Refer to your sales agreement to establish the terms of the limited warranty. In addition, Avaya's standard warranty language, as well as information regarding support for this product, while under warranty, is available through the Avaya Support Web site: http://www.avaya.com/support

Licenses

USE OR INSTALLATION OF THE PRODUCT INDICATES THE END USER'S ACCEPTANCE OF THE TERMS SET FORTH HEREIN AND THE GENERAL LICENSE TERMS AVAILABLE ON THE AVAYA WEB SITE http://www.avaya.com/support/licenseinfo/ (“GENERAL LICENSE TERMS”). IF YOU DO NOT WISH TO BE BOUND BY THESE TERMS, YOU MUST RETURN THE PRODUCT(S) TO THE POINT OF PURCHASE WITHIN TEN (10) DAYS OF DELIVERY FOR A REFUND OR CREDIT.

Avaya grants End User a license within the scope of the license types described below. The applicable number of licenses and units of capacity for which the license is granted will be one (1), unless a different number of licenses or units of capacity is specified in the Documentation or other materials available to End User. "Designated Processor" means a single stand-alone computing device. "Server" means a Designated Processor that hosts a software application to be accessed by multiple users. "Software" means the computer programs in object code, originally licensed by Avaya and ultimately utilized by End User, whether as stand-alone Products or pre-installed on Hardware. "Hardware" means the standard hardware Products, originally sold by Avaya and ultimately utilized by End User.

License type

Concurrent User License (CU). End User may install and use the Software on multiple Designated Processors or one or more Servers, so long as only the licensed number of Units are accessing and using the Software at any given time. A "Unit" means the unit on which Avaya, at its sole discretion, bases the pricing of its licenses and can be, without limitation, an agent, port or user, an e-mail or voice mail account in the name of a person or corporate function (e.g., webmaster or helpdesk), or a directory entry in the administrative database utilized by the Product that permits one user to interface with the Software. Units may be linked to a specific, identified Server.

Copyright

Except where expressly stated otherwise, the Product is protected by copyright and other laws respecting proprietary rights. Unauthorized reproduction, transfer, and/or use can be a criminal, as well as a civil, offense under the applicable law.

Third-party components

Certain software programs or portions thereof included in the Product may contain software distributed under third party agreements (“Third Party Components”), which may contain terms that expand or limit rights to use certain portions of the Product (“Third Party Terms”). Information identifying Third Party Components and the Third Party Terms that apply to them is available on the Avaya Support Web site: http://www.avaya.com/support/ThirdPartyLicense/

Preventing toll fraud

"Toll fraud" is the unauthorized use of your telecommunications system by an unauthorized party (for example, a person who is not a corporate employee, agent, subcontractor, or is not working on your company’s behalf). Be aware that there can be a risk of toll fraud associated with your system and that, if toll fraud occurs, it can result in substantial additional charges for your telecommunications services.

Avaya fraud intervention

If you suspect that you are being victimized by toll fraud and you need technical assistance or support, call Technical Service Center Toll Fraud Intervention Hotline at +1-800-643-2353 for the United States and Canada. For additional support telephone numbers, see the Avaya Support Web site: http://www.avaya.com/support/

Suspected security vulnerabilities with Avaya Products should be reported to Avaya by sending mail to: securityalerts@avaya.com.

Trademarks

Avaya, the Avaya logo, one-X are either registered trademarks or trademarks of Avaya Inc. in the United States of America and/or other jurisdictions.

All non-Avaya trademarks are the property of their respective owners.

Downloading documents

For the most current versions of documentation, see the Avaya Support Web site: http://www.avaya.com/support

Contact Avaya Support

Avaya Inc. provides a telephone number for you to use to report problems or to ask questions about your product. The support telephone number is 1-800-242-2121 in the United States. For additional support telephone numbers, see the Avaya Web site: http://www.avaya.com/support
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.

<table>
<thead>
<tr>
<th>Feature Name</th>
<th>32 bit operating system</th>
<th>64 bit operating system</th>
<th>Server operating system</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACD</td>
<td>Available</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>Telephony</td>
<td>Available</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>Video</td>
<td>Available</td>
<td>Not Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>IM/Presence</td>
<td>Available</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>TTY</td>
<td>Available</td>
<td>Available</td>
<td>Not Available</td>
</tr>
<tr>
<td>Desktop Sharing</td>
<td>Available</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>Supervisor</td>
<td>Available</td>
<td>Available</td>
<td>Available</td>
</tr>
<tr>
<td>My Computer mode</td>
<td>Available</td>
<td>Available</td>
<td>Not Available</td>
</tr>
</tbody>
</table>

---

**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
Requirements

- 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
- 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.
Requirements

| 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 checklist makes sure that all requirements are in place for an error-free installation.

<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Determine how your enterprise will deploy Avaya one-X Agent.</td>
<td>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.</td>
</tr>
<tr>
<td>2</td>
<td>Ensure that all product licenses are in place.</td>
<td>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.</td>
</tr>
<tr>
<td>3</td>
<td>Download the software package from the Avaya support site.</td>
<td>The Avaya one-X Agent software download package is available on the Avaya Support Web site at <a href="http://www.avaya.com/support">http://www.avaya.com/support</a>. For software requirements, see Software requirements on page 7.</td>
</tr>
<tr>
<td>4</td>
<td>Ensure that the end user and enterprise environments can support Avaya one-X Agent.</td>
<td>For the installation option, consider the following: • Is the required hardware in place? For hardware requirement, see Computer and</td>
</tr>
</tbody>
</table>

Installing and Configuring Avaya one-X® Agent  November 2009  13
<table>
<thead>
<tr>
<th>#</th>
<th>Task</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>other hardware requirements on page 8.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Have all related Avaya software products been installed and administered correctly? For Avaya software requirements, see Software requirements on page 7.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Have all related third-party software products been installed and administered correctly? For third-party software requirements, see Software requirements on page 7.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• 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 <a href="http://www.avaya.com/support">http://www.avaya.com/support</a>.</td>
</tr>
<tr>
<td>4</td>
<td>Administer Avaya one-X Agent feature on Communication Manager.</td>
<td>Ensure that your system administrator has configured Communication Manager to support extension assignments, IP connectivity, telephone types, video, and other settings. For details, see Administering Communication Manager for Avaya one-X Agent.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>You can:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Use a tool such as the Microsoft Software Management Server</td>
</tr>
<tr>
<td>#</td>
<td>Task</td>
<td>Description</td>
</tr>
<tr>
<td>----</td>
<td>-------------------------------------------</td>
<td>------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>(SMS) for silent installations.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Use a customer installation process that requires end users to manually install the Avaya one-X Agent and other related software.</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Begin the installation process.</td>
<td>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.</td>
</tr>
<tr>
<td>7</td>
<td>Start Avaya one-X Agent.</td>
<td>You must register your telephone extension with the Communication Manager system to configure your system preferences.</td>
</tr>
<tr>
<td>8</td>
<td>Complete the initial administration.</td>
<td>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.</td>
</tr>
</tbody>
</table>
Avaya one-X Agent installation checklist
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.

<table>
<thead>
<tr>
<th>Options</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use windows credentials to login to Central Management/ Presence servers</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Enable Tutorials</strong></td>
<td>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.</td>
</tr>
<tr>
<td><strong>Enable Click to Dial in Internet Explorer</strong></td>
<td>Select this option to enable Click-to-Dial support in Internet Explorer.</td>
</tr>
<tr>
<td><strong>Enable Click to Dial in Mozilla Firefox</strong></td>
<td>Select this option to enable Click-to-Dial support in Firefox. This option is displayed only if Firefox is installed on your computer.</td>
</tr>
</tbody>
</table>

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\<your username>\Application Data \Avaya\one-X Agent\1.0\`

**Destination:** `C:\Documents and Settings\<your username>\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.

<table>
<thead>
<tr>
<th>Property</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>INSTALLLOCATION</td>
<td>Requires full path to the directory where you want to install Avaya one-X Agent.</td>
</tr>
<tr>
<td>USERNAME</td>
<td>Sets the agent user name.</td>
</tr>
<tr>
<td>COMPANY NAME</td>
<td>Sets the name of your company.</td>
</tr>
<tr>
<td>INSTALLTUTORIALS</td>
<td>Installs help with or without tutorials.</td>
</tr>
<tr>
<td>Property</td>
<td>Description</td>
</tr>
<tr>
<td>--------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>Set its value as 1 to install help with tutorials.</td>
</tr>
<tr>
<td>ENABLECLICKTODIALIE</td>
<td>Enables Click-to-Dial feature in Internet Explorer.</td>
</tr>
<tr>
<td></td>
<td>Set its value as 1 to enable the feature in Internet Explorer.</td>
</tr>
<tr>
<td>ENABLECLICKTODIALFF</td>
<td>Enables Click-to-Dial feature in Firefox.</td>
</tr>
<tr>
<td></td>
<td>Set its value as 1 to enable the feature in Firefox.</td>
</tr>
<tr>
<td>ENABLEVIDEO</td>
<td>Enables video in Avaya one-X Agent.</td>
</tr>
<tr>
<td></td>
<td>Set its value as 1 to enable video.</td>
</tr>
<tr>
<td>LAUNCHAPPONEXIT</td>
<td>Starts Avaya one-X Agent immediately after installation.</td>
</tr>
<tr>
<td></td>
<td>Set its value as 1 to start Avaya one-X Agent immediately after installation.</td>
</tr>
<tr>
<td>USESINGLESIGNON</td>
<td>Enables single sign-on (SSO) for Avaya one-X Agent.</td>
</tr>
<tr>
<td></td>
<td>Set its value as 1 to allow users to perform a single sign on.</td>
</tr>
<tr>
<td>ENABLECENTRALSTORAGE</td>
<td>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.</td>
</tr>
<tr>
<td>CENTRALMANAGEMENTURI</td>
<td>Sets the storage path of the central location where agent profiles and configuration will be stored. Set its value as https://&lt;host&gt;/oneXAgentCM/client/, where &lt;host&gt; is the IP address of the Central Management server.</td>
</tr>
</tbody>
</table>

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.

---

**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.

<table>
<thead>
<tr>
<th>System Settings (UI settings)</th>
<th>Configuration XML</th>
<th>Corresponding XSD</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Login</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Phone Numbers</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Work Handling</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Greeting triggers</td>
<td>AudioGreetings.XML</td>
<td>Phone.XSD</td>
<td></td>
</tr>
<tr>
<td>VuStats</td>
<td>Stored internally</td>
<td>Phone.XSD</td>
<td></td>
</tr>
<tr>
<td>Screen Pop</td>
<td>ScreenPops.XML</td>
<td>ScreenPop.XSD</td>
<td></td>
</tr>
<tr>
<td>Launch Application</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Directory</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>ContactLog</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td>Controls the settings for Contact Log. ContactLog.XML contains the data.</td>
</tr>
<tr>
<td>Voice Mail Integration</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Reason Codes</td>
<td>WorkReasonCodes.XML</td>
<td>ReasonCode.XSD</td>
<td></td>
</tr>
<tr>
<td>System Settings (UI settings)</td>
<td>Configuration XML</td>
<td>Corresponding XSD</td>
<td>Remarks</td>
</tr>
<tr>
<td>-------------------------------</td>
<td>------------------------------------</td>
<td>-------------------</td>
<td>--------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td>AuxReasonCodes.XML</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>LogoutReasonCodes.XML</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Event Logging</td>
<td>Log4net.XML</td>
<td>No XSD</td>
<td>Apache log4net configuration.</td>
</tr>
<tr>
<td>Outlook Contacts</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Dialing Rules</td>
<td>Settings.XML</td>
<td>Settings.XSD</td>
<td></td>
</tr>
<tr>
<td>Touch Tone Shortcuts</td>
<td>TouchToneShortcuts.xml</td>
<td>Phone.XSD</td>
<td></td>
</tr>
<tr>
<td>Profiles</td>
<td>Profiles.XML</td>
<td>Profiles.XSD</td>
<td>Profiles.XML stores the selected profile.</td>
</tr>
</tbody>
</table>

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](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.

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.

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.

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.
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.

---

### 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**.

---

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.

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 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**.
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.

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.

---

**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.

---

**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.
Setting up the initial configuration

- 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.

---

**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 this procedure are available through the **Add Response** button on the IM window.

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.
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 auto options to adjust the audio volume for playback,
recording, and incoming calls. You can also set the system to play ringtone 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.
5. Click **OK**.

The new profile appears in the Profile list.

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.
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 re-installs 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
Index

A
administration using XML ........................................... 23
agent greetings
  activating .............................................................. 45
  steps .................................................................... 45
  enabling ............................................................ 45
agent profile ................................................................. 43
agent settings ............................................................... 35
another phone settings .................................................. 34
architecture overview .................................................... 6

C
call handling ............................................................ 39, 42
checklist ................................................................. 13
configuration using XML ............................................. 23
configuring
  incoming TTY appearance ................................ 41
  configuring IM settings ........................................... 36
  configuring incoming message appearance ............ 40
  configuring the agent settings ................................ 35
  customizing the installation .................................. 22

defining agent profile .................................................. 43
defining incoming call appearance ..................... 39, 42
defining reason code
  auxiliary reason code ........................................... 48
  log out reason code .......................................... 47
defining TTY display .................................................. 41
defining work codes
  work code .......................................................... 46
defining work handling options ....................... 38
desk phone login ........................................................ 33
dialing rules ............................................................ 37
display button toolbar ............................................... 49

F
features based on configuration ..................................... 8

G
getting started ........................................................... 27

I
IM settings ................................................................. 36

initial configuration ..................................................................... 31
installation overview ...................................................... 5
installing
  polycom video ..................................................... 22
installing Avaya one-X Agent
  silent mode .......................................................... 20
installing manually ....................................................... 17
introduction ..................................................................... 5

L
launching one-X Agent ................................................... 27
legal notices ..................................................................... 2
logging from a Desk Phone ......................................... 33
logging from a personal computer ......................... 32

M
manual installation ........................................................ 17
message appearance settings ..................................... 40
migrate profiles .......................................................... 19
migration failed .......................................................... 19
my computer setting ..................................................... 32

N
network connection ....................................................... 11
notices, legal .................................................................... 2

O
one-X Agent registration ............................................. 33, 34
overview ..................................................................... 5

P
phone display ............................................................. 49
phone settings ............................................................ 31

R
reason codes .................................................................. 46
registering with Communication Manager ............ 32, 33
registration ................................................................. 31
removing .................................................................... 53
  in interactive mode .................................................. 53
removing existing software ........................................ 55