



Using IP Office Contact Center Configuration Tool

Edition: 1.0
02/25/2014

COMPAS ID: 163721

© 2014 Avaya Inc.
All Rights Reserved.

Notice

While reasonable efforts have been made to ensure that the information in this document is complete and accurate at the time of printing, Avaya assumes no liability for any errors. Avaya reserves the right to make changes and corrections to the information in this document without the obligation to notify any person or organization of such changes.

For full support, please see the complete document, *Avaya Support Notices for Hardware Documentation*, document number 03-600759.

For full support, please see the complete document, *Avaya Support Notices for Software Documentation*, document number 03-600758.

To locate this document on our website, simply go to <http://www.avaya.com/support> and search for the document number in the search box.

Documentation disclaimer

"Documentation" means information published by Avaya in varying mediums which may include product information, operating instructions and performance specifications that Avaya generally makes available to users of its products. Documentation does not include marketing materials. Avaya shall not be responsible for any modifications, additions, or deletions to the original published version of documentation unless such modifications, additions, or deletions were performed by Avaya. End User agrees 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 End User.

Link disclaimer

Avaya is not responsible for the contents or reliability of any linked websites referenced within this site or documentation provided by Avaya. Avaya is not responsible for the accuracy of any information, statement or content provided on these sites and does not necessarily endorse the products, services, or information described or offered within them. Avaya does not guarantee that these links will work all the time and has no control over the availability of the linked pages.

Warranty

Avaya provides a limited warranty on its hardware and Software ("Product(s)"). 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 to Avaya customers and other parties through the Avaya Support website: <http://support.avaya.com>. Please note that if you acquired the Product(s) from an authorized Avaya reseller outside of the United States and Canada, the warranty is provided to you by said Avaya reseller and not by Avaya. "Software" means computer programs in object code, provided by Avaya or an Avaya Channel Partner, whether as stand-alone products or pre-installed on hardware products, and any upgrades, updates, bug fixes, or modified versions.

Licenses

THE SOFTWARE LICENSE TERMS AVAILABLE ON THE AVAYA WEBSITE, [HTTP://SUPPORT.AVAYA.COM/LICENSEINFO](http://support.avaya.com/licenseinfo) ARE APPLICABLE TO ANYONE WHO DOWNLOADS, USES AND/OR INSTALLS AVAYA SOFTWARE, PURCHASED FROM AVAYA INC., ANY AVAYA AFFILIATE, OR AN AUTHORIZED AVAYA RESELLER (AS APPLICABLE) UNDER A COMMERCIAL AGREEMENT WITH AVAYA OR AN AUTHORIZED AVAYA RESELLER. UNLESS OTHERWISE AGREED TO BY AVAYA IN WRITING,

AVAYA DOES NOT EXTEND THIS LICENSE IF THE SOFTWARE WAS OBTAINED FROM ANYONE OTHER THAN AVAYA, AN AVAYA AFFILIATE OR AN AVAYA AUTHORIZED RESELLER; AVAYA RESERVES THE RIGHT TO TAKE LEGAL ACTION AGAINST YOU AND ANYONE ELSE USING OR SELLING THE SOFTWARE WITHOUT A LICENSE. BY INSTALLING, DOWNLOADING OR USING THE SOFTWARE, OR AUTHORIZING OTHERS TO DO SO, YOU, ON BEHALF OF YOURSELF AND THE ENTITY FOR WHOM YOU ARE INSTALLING, DOWNLOADING OR USING THE SOFTWARE (HEREINAFTER REFERRED TO INTERCHANGEABLY AS "YOU" AND "END USER"), AGREE TO THESE TERMS AND CONDITIONS AND CREATE A BINDING CONTRACT BETWEEN YOU AND AVAYA INC. OR THE APPLICABLE AVAYA AFFILIATE ("AVAYA").

Avaya grants you a license within the scope of the license types described below, with the exception of Heritage Nortel Software, for which the scope of the license is detailed below. Where the order documentation does not expressly identify a license type, the applicable license will be a Designated System License. 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 you.

"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.

License type(s)

Heritage Nortel Software

"Heritage Nortel Software" means the software that was acquired by Avaya as part of its purchase of the Nortel Enterprise Solutions

Business in December 2009. The Heritage Nortel Software currently available for license from Avaya is the software contained within the list of Heritage Nortel Products located at <http://support.avaya.com/LicenseInfo> under the link "Heritage Nortel Products". For Heritage Nortel Software, Avaya grants Customer a license to use Heritage Nortel Software provided hereunder solely to the extent of the authorized activation or authorized usage level, solely for the purpose specified in the Documentation, and solely as embedded in, for execution on, or (in the event the applicable Documentation permits installation on non-Avaya equipment) for communication with Avaya equipment. Charges for Heritage Nortel Software may be based on extent of activation or use authorized as specified in an order or invoice.

Copyright

Except where expressly stated otherwise, no use should be made of materials on this site, the Documentation, Software, or hardware provided by Avaya. All content on this site, the documentation and the Product provided by Avaya including the selection, arrangement and design of the content is owned either by Avaya or its licensors and is protected by copyright and other intellectual property laws including the sui generis rights relating to the protection of databases. You may not modify, copy, reproduce, republish, upload, post, transmit or distribute in any way any content, in whole or in part, including any code and software unless expressly authorized by Avaya. Unauthorized reproduction, transmission, dissemination, storage, and or use without the express written consent of Avaya can be a criminal, as well as a civil offense under the applicable law.

Virtualization

Use any one of the following: (whichever applies to Avaya Password Reset Tool)

Option 1:

Each vAppliance will have its own ordering code. Note that each instance of a vAppliance must be separately ordered. If the end order customer or the Business Partner would like to install 2 instances of the same type of vAppliances, then 2 vAppliances of that type must be ordered.

Option 2:

Each product has its own ordering code. Note that each instance of a Product must be separately licensed and ordered. "Instance" means one unique copy of the Software. For example, if the end user customer or Business Partner would like to install 2 instances of the same type of Products, then 2 Products of that type must be ordered.

Third Party Components

"Third Party Components" mean certain software programs or portions thereof included in the Software that may contain software (including open source software) distributed under third party agreements ("Third Party Components"), which contain terms regarding the rights to use certain portions of the Software ("Third Party Terms"). Information regarding distributed Linux OS source code (for those Products that have distributed Linux OS source code) and identifying the copyright holders of the Third Party Components and the Third Party Terms that apply is available in the Documentation or on Avaya's website at: <http://support.avaya.com/Copyright>. You agree to the Third Party Terms for any such Third Party Components.

Note to Service Provider

The Product may use Third Party Components that have Third Party Terms that do not allow hosting and may need to be independently licensed for such purpose.

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 Toll 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 website: <http://support.avaya.com>. Suspected security vulnerabilities with Avaya products should be reported to Avaya by sending mail to: securityalerts@avaya.com.

Trademarks

The trademarks, logos and service marks ("Marks") displayed in this site, the Documentation and Product(s) provided by Avaya are the registered or unregistered Marks of Avaya, its affiliates, or other third parties. Users are not permitted to use such Marks without prior written consent from Avaya or such third party which may own the Mark. Nothing contained in this site, the Documentation and Product(s) should be construed as granting, by implication, estoppel, or otherwise, any license or right in and to the Marks without the express written permission of Avaya or the applicable third party.

Avaya is a registered trademark of Avaya Inc.

All non-Avaya trademarks are the property of their respective owners, and "Linux" is a registered trademark of Linus Torvalds.

Downloading Documentation

For the most current versions of Documentation, see the Avaya Support website: <http://support.avaya.com>.

Contact Avaya Support

See the Avaya Support website: <http://support.avaya.com> for product notices and articles, or to report a problem with your Avaya product.

For a list of support telephone numbers and contact addresses, go to the Avaya Support website: <http://support.avaya.com>, scroll to the bottom of the page, and select Contact Avaya Support.

COMPAS

This document is also available in the COMPAS database. The

COMPAS ID for this document is 163731.

Contents

About this manual	13
Questions about this manual	13
Who is part of the target group?	13
What kind of information is provided?.....	13
What kind of information is not provided?.....	14
How is this manual organized?.....	14
Which edition are you reading?.....	14
Getting to know the Configuration module	16
What is Configuration?.....	16
What can you configure?.....	16
What does configuring mean?	16
What are objects?	16
Which objects are there?	16
What are task types?.....	17
Where are data stored?	17
Structure of the Configuration module	18
Opening the Configuration module	18
Menus	18
Commands in the Configuration menu.....	18
Commands in the System menu	19
Commands in the Service menu	20
Commands of the Window menu	20
Commands of the Help menu	21
List box.....	21
Tab.....	21
Search fields	21
Status bar	21
Tools	22
Changing the name of an object	22
Columns	23
Using the keyboard.....	24
Working with the mouse	24
Configuring topics	25
What is a topic?	25
What does the Topic tab show?	25
What do you need to configure a topic?	26
How many topics can you configure?	26
What do you need to change the name of a topic?	26
Which actions can you carry out on the Topic tab?.....	26
Editing a topic: General tab	27
Name	27
Priority.....	27
Task type	27
x blocked periods.....	27
Variables.....	27
About	27
Editing a topic: Telephony tab.....	28

Settings	28
Job code	30
Reporting/Realtime information	30
Skills	30
Routing	30
Announcement	30
Editing a topic: Email tab	31
Mailbox	31
Max. time to accept	31
Max. reservation time	31
Job code	31
Reporting/Realtime information	31
Skills	31
Routing	31
Inserting the ticket ID in the subject	32
Editing mailbox details	33
SMTP protocol	33
POP3 protocol	33
IMAP4 protocol	34
Configuring a POP3 topic	35
Configuring an IMAP4 topic	35
Enabling the POP3 or IMAP4 connector	36
Configuring Microsoft Exchange	37
Connecting to a Microsoft Exchange server	37
Creating a dedicated contact for each topic	37
Creating a distribution group	37
Adding contacts to a distribution group	38
Adding a subdomain and a relay host	38
Configuring blocked periods	38
What are blocked periods?	38
Note	39
Which settings can you configure for blocked periods?	39
Configuring job codes	40
What is a job code?	40
Which settings can you configure for job codes?	40
Configuring skills	41
Skill tab	41
Which actions can you execute with the Topic skills and Agent skills tabs?	42
Skill	42
Skills-based routing optimization	43
Skills and skill levels	43
Task Flows	43
Configuring skill tag names	44
Configuring topic skills and skill levels	44
Configuring agent skills and skill levels	45
Using statistical values in the task flow	45
Scenario: Routing calls based on an agent's product knowledge	46
Configuring routing	46
Options for routing calls and emails	47
Recommendation for high load systems	47
Last agent function	47
Routing functions	47
Creating a keyword-based email routing task flow	47
Configuring announcements	48
What are direct incoming calls?	48
What are transferred calls?	49
Which settings can you configure for the announcement text assignment?	49
What are hold announcements?	49
Editing a topic: chat tab	50
Settings	50

Automatic text at	50
Job code	50
Reporting/Realtime information	50
Skills	51
Configuring agent groups	52
What is an agent group?	52
What does the Agent group tab show?	52
How many agent groups can you configure?	52
What do you need to change the name of an agent group?	53
Which actions can you execute with the Agent group tab?	53
What is a virtual agent group?	54
Assignment	54
Agent signon and signoff	54
Priority	54
Task flow set	55
Note on Realtime information	55
Icon	55
Editing an agent group: General tab	56
Name	56
Task type	56
Variables	56
Virtual agent group	56
Editing an agent group: Telephony tab	57
View option	57
PBX	57
Number	57
Call distribution	57
Queue factor	58
Overflow factor	58
Announcement factor	58
Ring timeout	58
Urgent info	59
Signaling threshold	59
Routing number	59
Signoff prevention	59
Overflow groups	59
Night service group	59
Reporting/Realtime information	60
Agents	60
Editing an agent group: Email tab	61
Signoff prevention	61
Agents	61
Reporting/Realtime information	61
Editing an agent group: chat tab	62
Agents	62
Reporting/Realtime information	62
Creating a virtual agent group	63
Prerequisites	63
Notes on assigning agents	63
Configuration using an example	63
Example: Variable for virtual agent group	64
Settings for virtual agent group	64
Configuring agents	65
What is an agent?	65
What does the Agent tab show?	65
How many agents can you configure?	65
Which actions can you execute with the Agent tab?	66

Editing an agent: General tab.....	66
System name.....	66
Login name.....	66
Alias	66
Automatic Login through Windows User Account	67
Language	67
Task type	67
Last name	67
First name.....	67
Employee ID.....	67
Cost center.....	67
Title	68
Predefined profile	68
Address book profile	68
Password.....	68
2. Password.....	68
Variables.....	69
Skills.....	69
Availability	69
Privileges	69
Authorization.....	70
Editing an agent: Telephony tab	71
Telephony name	71
PBX	71
Subscriber number.....	71
Number of connections.....	71
ACW.....	71
Routing logout.....	71
Group assignment.....	72
Password.....	72
Editing an agent: Email tab.....	73
Mailbox	73
Mailbox details	73
Group assignment.....	73
Editing an agent: Chat tab.....	74
Settings	74
Group assignment.....	74
Which privileges are there?	75
What are privileges?	75
Setting privileges.....	75
What does P mean?	75
Privileges: Agent	76
Privileges: UI.....	78
Privileges: UMR.....	80
Privileges: Configuration.....	81
Privileges: Variables.....	83
Privileges: Reporting	84
Privileges: Realtime information.....	85
Privileges: Taskflow Editor	87
Configured privileges: Others	88

Configuring agent profiles 89

What is an agent profile?	89
Using inheritance.....	89
Assigning the same profile to several agents.....	89
Using profiles as tools	90
What does the Agent profile tab show?.....	90
How many agent profiles can you configure?	90
When is it not possible to delete a profile?.....	90

Which actions can you execute with the Agent profile tab?.....	91
Update in the UI configuration.....	91
Editing an agent profile: General tab.....	92
Name.....	92
Task types.....	92
Used for.....	92
Privileges.....	92
Authorization.....	92
Editing an agent profile: Telephony tab.....	94
PBX.....	94
Group assignment.....	94
Settings.....	94
Editing an agent profile: Email tab.....	94
Group assignment.....	94
Editing an agent profile: Chat tab.....	94
Settings.....	94
Group assignment.....	95

Configuring teams 96

What is a team?.....	96
What does the Team tab show?.....	96
How many teams can you configure?.....	96
How many members can a team have?.....	96
Which actions can you execute with the Team tab?.....	96
Editing a team: General tab.....	97
Name.....	97
Team members.....	97
Other agents.....	97
Editing a team: Telephony, Email, Chat tab.....	98
Realtime information settings.....	98
Wait time threshold for TSF.....	98
Calculating period of time.....	98

Configuring announcements 99

What is an announcement?.....	99
What does the Announcement tab show?.....	99
Which actions can you execute with the Announcement tab?.....	100
Editing an announcement.....	101
How many announcement texts can you configure?.....	101
Creating or changing an announcement text.....	101
Supported WAV format.....	101
PBX: Announcement.....	102

Configuring announcement scripts 103

What is an announcement script?.....	103
What are announcement texts?.....	103
What does the Announcement script tab show?.....	103
How many announcement scripts can you configure?.....	103
Which actions can you execute with the Announcement script tab?.....	104
Editing an announcement script.....	105
Name.....	105
Welcome announcement.....	105
Free of cost.....	105
At the end of script.....	105
Announcement texts.....	106
Which actions can you execute with the Edit Announcement Script tab?.....	106
Inserting an announcement text.....	106
Configuring a 1x announcement.....	107

Configuring voice units	108
What is a voice unit?.....	108
What does the Voice unit tab show?	108
How many voice units can you configure?.....	108
Which actions can you execute with the Voice unit tab?	108
Editing a voice unit.....	109
Properties of a voice unit.....	109
Line allocation.....	111
Scripts.....	111
Editing the properties of a VU script.....	111
Voice mails.....	112
Configuring customer recognition	113
What is a customer?.....	113
How is a customer identified?	113
What does the Customer tab show?.....	113
How many customers can you configure?.....	114
Which actions can you execute with the Customer tab?.....	114
Editing a customer	115
Name	115
Customer no.	115
Prio	115
Company entry	115
Numbers/emails.....	116
Personal contact/topic.....	116
Creating or changing a customer number or email.....	117
Inserting an agent as personal contact	117
Inserting a topic as personal topic	117
Dialed topic	117
Importing customers	118
Which prerequisites must be met?.....	118
Restriction	118
What does an import file look like?.....	118
What does a control file look like?.....	118
Examples for data and control files	120
Importing customer data automatically	121
Prerequisites	121
What can you configure?.....	121
Icon for automatic import.....	121
Configuring external destinations	122
What is an external destination?	122
What does the External destination tab show?	122
How many external destinations can you configure?	122
Which actions can you execute with the External destination tab?	122
Properties of an external destination.....	123
Properties.....	123
How does the delay time work?	124
Configuring voice recording with Voicemail Pro	124
Configuring automatic voice recording	124
Procedure.....	124
Configuring on demand voice recording	125
Procedure.....	125
Configuring workplaces	126

What is a workplace?.....	126
What does the Workplace tab show?.....	126
How many workplaces can you configure?.....	126
Which actions can you execute with the Workplace tab?.....	127
Editing a workplace	127
Workplace name and info.....	127
Terminal workplace.....	127
Telephone	127
How do you set up an agent on a terminal server?	128
Installing on a terminal server	128
Setting up a workplace on a terminal server.....	128
Signing on	128
Note for trace system.....	129
Configuring pause codes	130
What is a pause code?.....	130
What does the Pause code tab show?	130
How many pause codes can you configure?.....	130
Which actions can you execute with the Pause code tab?	130
Editing a pause code	130
Pause code	130
Configuring PBXs	131
What is a PBX?.....	131
What does the PBX tab show?	131
How many PBXs can you configure?.....	131
Which actions can you execute with the PBX tab?	131
Editing a PBX.....	131
Editing a PBX configuration	132
Settings	134
External line	135
Configuring PBX connections.....	136
Task server	137
Editing the properties of an assigned application [VEA] VEA	138
PBX access	141
Access code	142
Conf. access.....	143
Configuring the country setting	145
What is the country setting?.....	145
What does the Country setting tab show?.....	145
Which actions can you execute with the Country setting tab?	145
Editing the country setting.....	146
Creating a country setting.....	146
Deleting a country setting.....	146
Configuring queue devices	147
What is a queue device?.....	147
What does the Queue device tab show?	147
Which actions can you execute with the Queue device tab?	147
Editing queue devices	148
Creating queue devices.....	148
Deleting queue devices.....	148
Configuring telephones	149
What is a telephone?	149

Notice IP Office PBX.....	149
What does the Telephone tab show?	149
Which actions can you execute with the Telephone tab?	149
Editing telephones	150
Creating a telephone	150
Deleting a telephone	150
Configuring telephone groups	151
What is a Telephone group?	151
Conditions.....	151
What does the telephone group tab show?.....	151
Which actions can you execute with the Telephone group tab?	151
Monitoring telephone status.....	152
Configuring the CHAP server	152
What is the CHAP server?	152
What does the CHAP server tab show?.....	152
Which actions can you execute with the CHAP server tab?.....	153
Editing the CHAP server	154
Prerequisite.....	154
Properties Chap adapter line	154
Pool for topics	154
IPO-SIPEXT-IP Settings Explanation.....	154
PBXIPAddress, PBXSignalPort	155
Network quality	156
Deleting CHAP servers	156
Ring tone setup for CHAP	157
Ring tone properties	157
Format	157
Ring tone set up.....	157
Examples	158
Fax tone detection.....	159
Settings: Fax tone detection.....	159
Fax tone detection set up	159
Configuring the VEA	160
What is a VEA?	160
Note for assigning a VEA.....	160
What does the VEA tab show?	160
Which actions can you execute with the VEA tab?.....	160
Properties VEA.....	160
Configuring the Chat server	162
What is a Chat server?	162
What does the Chat server tab show?	162
Edit, create or delete a Chat server	162
Properties Chat server.....	162
Editing the Chat taskservers	163
Properties Chat taskservers.....	163
Configuring the Chat script	164
What is a Chat script?	164
What does the Chat script tab show?.....	164
Edit, create or delete a Chat script.....	164
Editing a Chat script	164
Properties of a Chat script	164

Configuring the system settings	165
General.....	165
System language.....	165
Pause codes.....	165
Call list	165
Time off	166
When do you use time off?.....	166
What is the difference between breaks and blocked periods?	166
Which actions can you execute with the Definition of time off tab?.....	166
Which settings can you configure for time off periods?.....	167
Reporting settings	168
General reporting settings.....	168
Reporting settings for the task type Telephony	170
Reporting settings for the task type Email.....	171
Reporting settings for the task type Chat.....	172
Deleting reporting data	173
Prerequisites	173
Deleting reporting data	173
Realtime information default values	174
General realtime information default values	174
Realtime information default values for the task type Telephony	174
Realtime information default values for the task type Email	175
Realtime information default values for the task type Chat	176
Variables	177
Which actions can you execute with the Defined Variables dialog?.....	177
Inserting or changing variables.....	177
Selecting a tag	177
Tag list.....	178
What is a tag?	178
Which actions can you execute with the Defined Tags dialog?	178
Inserting or changing tags	179
Applying Tags into Task resulting from Conference/Transfer.....	179
Which tags are prepared in the IP Office Contact Center system?.....	180
Configuration report	181
What do you need for a configuration report?.....	181
How long does the export take?	181
Which configuration data can you export?.....	181
Availability for tasks.....	183
Task type Telephony	183
Task type Email	183
Task type Chat.....	184
Skill overview.....	185
List box: View	185
Tab: Agent skills	185
Tab: Topic skills.....	186
Interface for staff planning	187
Prerequisites for using the interface for staff planning	187
Time settings	187
Counters	187
Task report.....	188
Prerequisite	188
View option	188
Starting or stopping	188
Deleting data.....	188
Shift plan.....	189
Shifts.....	189
 Configuring the service settings	 190
Overview of service settings.....	190

Prerequisite	190
List of service settings	190
Reporting filters	191
Prerequisite	191
Which types are there?	191
List of counters	191
Selecting the view	191
Where can you get additional information on counters?	191
Modifying the reporting counter name	192
Special settings	193
Prerequisite	193
Allow changing topic names and Allow changing agent group names	193
Minimum team size	193
Reporting from caller's point of view	193
Reporting type	194
Reporting/Realtime information	194
Last/Current agent routing function	194
Additionally send as an Email	194
Telephone default settings	196
Prerequisite	196
Telephone settings	196
Inserting or changing an announcement module	198
Access code agents and Access code topics	199
Prerequisite	199
Which actions can you execute with the Access code agents dialog?	199
Editing an external line code	199
Email settings	200
Prerequisite	200
System settings tab	200
Chat settings	200
Prerequisite	200
Archive settings	200

Using the Help and About dialogs 201

Using the Help	201
Help during the operation	201
Starting the Online Help	201
Displaying information about the Configuration module	202
Information in the About Configuration dialog	202
Other ways to get help	202
Information on the Internet	202

Glossary 203

Index 205

About this manual

Questions about this manual

Before you start reading you might have questions concerning this document. In this section, we answer some of those questions.

Who is part of the target group?

This manual is intended for persons working with the **Configuration** module or wanting to learn about its individual features. It makes no difference whether you are using this document in printed or online form.

Use this manual as you see fit, for reference purposes or to get to know the options the **Configuration** module provides.

Please note that as a user you might have different authorizations (privileges). To be able to use all functions of the **Configuration** module, you either need to have the respective privileges or sign on as a specific user with the respective password.

What kind of information is provided?

This document contains information on how to use and operate the **Configuration** module.

What kind of information is not provided?

This document does not provide information on the installation and commissioning of the **Configuration** module. You can find information about other modules in the IP Office Contact Center system in the corresponding documents.

How is this manual organized?

The structure of this document provides a systematic introduction to the use of the **Configuration** module. Once you have read a few pages you will notice that topics are structured similarly. Usually, an introduction to the topic is provided first. Prerequisites or necessary skills are often described next, Instructions follow the prerequisites or necessary skills. An illustration or example further clarifies the topic.

Which edition are you reading?

The following table lists information about this edition:

Compiled on:	February 25, 2014
Based on:	Configuration module

Getting to know the Configuration module

What is Configuration?

The **Configuration** module is a central module of a IP Office Contact Center system for configuring objects. The other modules use these configured objects.

Get to know the most important terms used with the **Configuration** module.

What can you configure?

You configure all objects of a IP Office Contact Center system with the **Configuration** module. You also configure system settings. You can change configurations and delete objects.

What does configuring mean?

Configuring means that you create objects and determine the properties of these objects.

What are objects?

In this document objects is used as collective term for different items fulfilling certain tasks within the IP Office Contact Center system. An object has certain properties for these tasks. The properties of an object also depend on the task type the object is used for.

Which objects are there?

The following list shows all possible objects of a IP Office Contact Center system you can configure with the **Configuration** module. The objects are illustrated with icons. You also find these icons in the other modules of the IP Office Contact Center system.

Object	Icon
Topic	
Agent group	
Virtual agent group	
Agent	
Agent profile	

Object	Icon
Team	
Announcement	
Announcement script	
Voice unit	
Customer	
External destination	
Workplace	
Pause code	
PBX	
Country setting	
Queue device	
Telephone	
Telephone group	
CHAP server	
VEA	
Chat server	
Chat script	

What are task types?

The task type indicates the task a certain object is used for. You can use an object for several task types. You have to configure the respective properties for each task type.

A IP Office Contact Center system supports the following task types.

Task type	Explanation
Telephony	Used for all telephony tasks. An agent uses a telephone to process telephony tasks. It makes no difference whether the agent uses an analog or a digital telephone or a PC with the telephony module.
Email	Used for all email tasks. An agent processes email tasks with the modul E-mail.
Chat	Used for all chat tasks. An agent processes chat tasks with the modul Chat.

Where are data stored?

All data are stored in a database. The database is located on a network computer. The respective computer must be entered in your server settings.

Structure of the Configuration module

Like other Windows applications the **Configuration** module features menus, commands, and a tool bar.

Opening the Configuration module

The **Configuration** is included in the user interface.

Prerequisite

You must start the user interface before you can use the module. For information on how to do so, see the relevant documentation.

Open

To open the **Configuration** module, follow these steps.

1. In the **task bar** click **Administration**.



2. Click the **Configuration module**.
3. The **Configuration** module opens.

or

1. In the **Window** menu select **Configuration**.
2. The module will open.

Menus

The following schematic illustration shows the menus of the **Configuration** module.

Configuration System Service Window Help

Commands in the Configuration menu

The following table shows the commands and functions of the **Configuration** menu.

Command	Function
Topic	Shows the configured topics. The Topic tab opens.
Agent group	Shows the configured agent groups. The Agent group tab opens.
Agent	Shows the configured agents. The Agent tab opens.
Agent profile	Shows the configured agent profiles. The Agent profile tab opens.
Team	Shows the configured teams. The Team tab opens.
Customer	Shows the configured customers. The Customer tab opens.

Command	Function
External destination	Shows the configured external destinations. The External destination tab opens.
Workplace	Shows the configured workplaces. The Workplace tab opens.
Announcement	Shows the configured announcements. The Announcement tab opens.
Announcement script	Shows the configured announcement scripts. The Announcement script tab opens.
Voice unit	Shows the configured voice units. The Voice unit tab opens.

Commands in the System menu

The following table shows the commands and functions of the **System** menu.

Command	Function
General	Shows the system settings.
Time off	Shows the defined time off periods.
Reporting settings	Shows the reporting settings.
Delete Reporting Data	Shows a period for deleting reporting data.
Realtime information default values	Shows Realtime information default values.
Variables	Shows the defined variables.
Tag list	Shows the defined tags.
Configuration report	Shows the configuration report.
Availability for Tasks (default)	Shows the default settings for availability for task types.
Skill overview	Shows the skill overview.
Interface for staff planning	Shows the settings for the staff planning interface.
Task Report	Shows the settings for the Task report.
Shift plan	Shows the settings for the shift plan.
Pause code	Shows the pause code.

Commands in the Service menu

The following table shows the commands and functions of the **Service** menu.

Command	Function
Reporting filters	Shows the reporting counters.
Special settings	Shows the special settings.
Telephone default settings	Shows the default telephone settings.
Announcement Modules	Shows the announcement modules.
PBX	Shows the configured PBXs.
Country setting	Shows the configured country settings. These settings are currently not required for IP Office Contact Center.
Queue device	Shows the configured queue devices.
Telephone	Shows the configured telephones.
Telephone group	Shows the configured telephone groups.
CHAP server	Shows the configured CHAP server.
VEA	Shows the configured Voice Extension Adapter.
Access code agents	Shows the selection codes of the PBXs for agents.
Access code topics	Shows the selection codes of the PBXs for topics.
Email Settings	Shows the email settings.
Chat server	Shows the settings for the chat server.
Chat settings	Shows the chat settings.

Commands of the Window menu

The following table lists all commands and functions of the **Windows** menu.

Command	Function
Status bar	Hides or shows the status bar.
Save settings	You can save the current settings. The same settings are used the next time you start the module.

Commands of the Help menu

The following table lists all commands and functions of the **Help** menu.

Command	Function
Contents	Shows the Help contents.
About Configuration	Shows information about the Configuration module.

List box

A list box shows the objects configured for the specific task type.

The respective objects are displayed for the following task types.

Task type	Object
Telephony	Shows the configured PBXs.
Email	Shows the configured email archives.
Virtual	Shows the configured virtual agent groups.

Selecting an object

You can select an object of a task type. The list of a tab shows only the objects configured for the respective task type.

Select all

If you select **<All>** all objects are displayed in the list of a tab.

Tab

For a clear presentation the objects are displayed on tabs. A tab lists the corresponding configured objects.

In a tab you can use the following functions.

- Edit
- Add
- Copy
- Delete
- Update
- Columns

Search fields

You can use the search fields to search lists on a tab. Search fields are located at the bottom of lists.

Status bar

The status bar displays information about the selected command.

You can show or hide the status bar.

1. In the **Window** menu, select **Status bar**. The status bar is hidden or displayed.

Tools

You learn how to work with the **Configuration** module and use special functions.

Changing the name of an object

Problems

You can change the name of an object anytime. However, please keep in mind that the name of an object also defines the object explicitly in the **Taskflow Editor** module. Problems might arise if for example you change the name of a topic and this topic is used in a task flow set.

No brackets () [] { }

Please note that you must not use any brackets for the name of an object.

No characters @ " ' % ! \ < > | / ? =

Please note that you must not use these characters for the name of an object.

Columns

Objects, like topics or agent groups, are presented in tables. These tables show additional information on objects in columns.

You can customize the column arrangement of these tables, change the order of columns and display or hide columns. You can also search for certain entries.

Changing the order

Objects in a table are always shown in alphabetical order. You can sort the display alphabetically according to any column. You can sort in ascending or descending order. Per default the information, e.g. names, is presented alphabetically. This means after A comes B then C etc.

Proceed as follows to sort the table according to a certain column.

1. Click the column heading.
2. The table is sorted alphabetically according to this information, e.g. the number. The column heading shows the symbol ▲ .
3. Click the column heading again to change the order.
4. The table is sorted in reverse order. The column heading shows the symbol ▼ .

Configuring the columns

You can configure which information the table shows. The standard setting is used by default.

Proceed as follows to configure the columns.

1. In table, view click the **Columns** button. The **Configuration of Columns** dialog opens.
2. Deselect **Use defaults**.
3. You can customize the visible columns with the buttons <<< (insert) >>> (remove), **Up** and **Down**.
4. Click **OK** to save your settings. The table of objects is then displayed with the configured columns.

Searching in columns

You can search a table for certain entries. You find respective search fields at the bottom area of the table. You can thus search a table containing many objects for specific objects with certain properties.

Proceed as follows to search for an agent, for example, with a certain number.

1. Enter "2", for example, in the search field for the number.
2. The first entry found is selected in the table. In our case, an agent whose number starts with "2".

Using the keyboard

You can execute the following functions with the keyboard.

Function	Action
Selecting a list box	Press the Space bar.
To move to the next command or button	Press the Tab key. Press Shift + Tab to return to the previous entry.
To increase a numeric entry	Press the Up arrow.
To decrease a numeric entry	Press the Down arrow.
To select the maximum value of an entry	Press the Page Up key.
To select the minimum value of an entry	Press the Page Down key.

Working with the mouse

You can execute the following functions with the mouse button.

Function	Action
To edit an object	Double-click the name of the object.
To select multiple objects in sequence	Click the first object of the list. Press the Shift key and keep it pressed. Click the last object of the list.
To select several non-successive objects	Click the first object of the list. Press the Ctrl key and keep it pressed. Click the objects you want to select.
To edit, create, copy, delete	Click the name of an object with the right mouse button. A pop-up menu opens. Select the command.

Configuring topics

What is a topic?

A topic represents a service or task to carry out in the IP Office Contact Center system.

A certain destination and a name identify a topic. A customer dials this destination.

Every topic must be assigned to an agent group.

You must enter topic name, VDN and agent group for a topic. You can further determine other settings for a topic.

What does the Topic tab show?

The **Topic** tab shows a list of all configured topics. The following information is listed.

Header	Explanation
Name	Shows the name of the topic.
Tel	Shows if a topic is configured for the task type Telephony.
Email	Shows if a topic is configured for the task type Email.
Subscriber number	Shows the number of the topic.
active	Symbol X indicates that the number has been set up in the CHAP configuration.
PBX	Shows the PBX of the topic.
Email address	Shows the email archive of the topic.

What do you need to configure a topic?

Please note that you cannot configure a topic without an access code (external line code).

How many topics can you configure?

You can configure up to 4,000 topics in a PBX.

Note that you need the necessary licenses.

What do you need to change the name of a topic?

You need the corresponding special privilege to change the name of an already configured topic.

Which actions can you carry out on the Topic tab?

You can initiate the following actions with the Topic tab. There is a button for each action.

Action	Explanation
Edit	Opens the selected topic. You can edit the properties.
Create	Creates a new topic.
Copy	Copies a selected topic.
Delete	Deletes a selected topic.
Blocked periods	Shows the blocked periods for the selected topic. You can edit the blocked periods.

Editing a topic: General tab

You can configure name, task type, priority, blocked periods, variables and info in the general settings.

The general settings are valid for all task types.

Name

Shows the name of the topic. You can use a topic name only once. You can use 29 alphanumeric characters maximum.

No brackets () [] { }

Please note that you must not use any brackets for the name of an object.

No characters @ " ' % ! \ < > | / ? =

Please note that you must not use these characters for the name of an object.

Priority

You can assign a priority to a topic. This priority is evaluated only if the IP Office Contact Center server handles call routing. You can set the priority between 0 and 100.

Task type

Shows the task type for which the topic is configured. You can configure a topic for the following task types. A new tab opens for each task type. You have to enter the respective settings.

- Telephony
- Email
- Chat

x blocked periods

You can configure blocked periods for a topic. The number (x) shows how many blocked periods are defined.

Variables

Shows the variables for the object topic. You can add, change or delete variables.

About

Shows the topic information. You can define an info field and text for row 1 and row 2.

Editing a topic: Telephony tab

You can configure the respective properties if you enable a topic for the task type Telephony.

If you enable a topic for the Telephony task type, you must select a PBX. Note that you cannot change this setting later.

Settings

You have to configure the following settings.

Setting	Explanation
VDN	Specifies the VDN and extension. You configure VDNs (access codes) and the extension length in the PBX settings.
Access code	
Extension	Select a VDN. Enter an extension number. Once you click OK to save the topic, you can no longer change the VDN, extension or PBX. For further information about call number identification see the user manual System Administrator.
PBX	To select a PBX, select Telephony as the task type for a topic and click OK . You cannot change the PBX assignment later.
Agent group	For a PBX you can select an agent group for the topic. You need the allocation of an agent group for the ring timeout function for Last agent, Current agent and Personal contact. _D2HLink_162890
ACW	Shows the ACW. The ACW determines how soon an agent who answered a call for this topic is assigned the next call. The ACW starts at the end of a call. In the ACW box enter the default ACW for the topic. You can set the ACW between 0 and 180 seconds.
Max. reservation time	Shows the maximum reservation time. The maximum reservation time determines for how long a call to this topic is held. In the Max. reservation time box enter the maximum reservation time for this topic You can set the maximum reservation time between 0 and 3,600 seconds.

Setting	Explanation
Distribute call after release by agent - max. times	Shows the maximum number of times a call is rerouted if the agent releases the call. If 0 is set the call is not returned to call routing after the agent released the call. If 1 is set the call is returned to call routing once after the agent released it. The caller is e.g. connected to an automatic announcement (number).
VIP topic	Please note that this function has no consequence if the IP Office Contact Center server handles call routing.
Script for playing voice mails	Shows a script for voice mails. If a voice mail for the topic comes in this script is started. The script processes the voice mail. The script can play the voice mail for example.
PBX cluster overflow topic	Selects a topic as an overflow topic. You need an overflow topic in the PBX cluster. See also: Overflow topic in the PBX cluster

Job code

You can configure job codes for the topic. You can determine the length of the job code and predefine codes. At a PC terminal these codes are then displayed in a list. This simplifies the input and allocation at a PC workplace.

Reporting/Realtime information

You can use the default values for reporting and realtime information or set other values.

You determine the default values using the system settings.

Skills

You can select the agents' skills for the task type Telephony.

Routing

You can set the hold time and minimum contact time for the last agent last agent function. You can also configure how the Last agent, Current agent and Personal contact objects are handled in IP Office Contact Center system routing. If the object are included in the kernel, you can define a sequence for the objects.

Announcement

You can assign four announcements to the topic.

- Hold announcements
- For dialed-in calls
- For transferred calls

Editing a topic: Email tab

You can configure the respective properties if you enable a topic for the task type Email.

Mailbox

Shows the topic mailbox.

Max. time to accept

Shows the maximum time to accept for emails in hours and minutes.

The time to accept starts as soon as an email arrives at the agent's folder.

If the agent does not open an email (Outlook) before the maximum time for accepting is exceeded, the workplace is logged out of the distribution for all agent groups.

Use the format hh:mm (hours, minutes).

Max. reservation time

Shows the maximum reservation time. The maximum reservation time determines for how long an email for this topic is held.

The reservation time starts as soon as an email arrives in the agent's folder.

Use the format hh:mm (hours, minutes). You can set the maximum reservation time between 1 minute and 24:00 hours.

Job code

You can configure job codes for the topic. You can determine the length of the job code and predefine codes. At a PC terminal these codes are then displayed in a list. This simplifies the input and allocation at a PC workplace.

Reporting/Realtime information

You can use the default values for reporting and realtime information or set other values.

You determine the default values using the system settings.

Skills

You can select the agents' skills for the task type Email.

Routing

You can set the hold time and minimum contact time for the last agent last agent function. You can also configure how the Last agent, Current agent and Personal contact objects are handled in IP Office Contact Center system routing. If the object are included in the kernel, you can define a sequence for the objects.

Inserting the ticket ID in the subject

You can automatically assign a number, the ticket ID, to new emails that are received in the topic.

Ticket IDs are used to logically connect several customer requests and queries relating to the same transaction.

If you select the check box, the ticket ID is inserted in the subject. The subject line is only updated when you reply or forward an e-mail. If you delegate an e-mail, the subject is not changed.

In order to activate the change, the service C3000 Client adapter must be restarted.

Editing mailbox details

You configure the properties of the mailbox with the **Mailbox Details** dialog.

Field	Explanation
Email	Shows the mailbox email address.
Reply to	This field contains the reply address for a received email. If an agent uses the Reply function to reply to an email, the Reply to address in the MIME message is used. The Reply to address is not necessarily the sender's address. This option is primarily used to control replies to emails the agent sends or that are sent automatically.
From	This field lets the agent change his sender address. The topic address is usually used in this field.
<input checked="" type="checkbox"/> Mailbox active	<p>If you select Mailbox active, emails are accepted and routed by this mailbox.</p> <p>If you do not select this option, emails that are routed in realtime to topics are processed until the topic does not contain any more emails.</p> <p>In the UMR web client, the topic is not available as a destination when delegating.</p>

SMTP protocol

You do not need to make any more settings for the SMTP protocol.

If you select **Mailbox active**, emails are received and then routed to the respective topic.

If you do not select **Mailbox active**, emails are declined. An error message indicating that the mailbox is unavailable is sent to the upstream mail server (before UMR). Emails from customers to the company are received correctly by the upstream mail server.

POP3 protocol

You need to populate the following fields for the POP3 protocol.

Field	Explanation
Mail server	Specifies the name of the mail server.
Port	Port 110 is usually the default port.
User	Specifies the mailbox address.
Polling interval	Specifies the interval at which the unread messages are retrieved.
Password	Specifies the user's password.
Confirm password	Repeat the password.

If you select **Mailbox active**, emails are retrieved by this mailbox and then routed to the respective topic.

If you do not select **Mailbox active**, emails are received by the POP3 mailbox but not retrieved. Emails from customers to the company are received correctly by the upstream mail server.

IMAP4 protocol

You need to populate the following fields for the IMAP4 protocol.

Field	Explanation
Mail server	Specifies the name of the mail server.
Port	Port 143 is usually the default port.
User	Specifies the mailbox address.
Polling interval	Specifies the interval at which the unread messages are retrieved.
Password	Specifies the user's password.
Confirm password	Repeat the password.
Action	Specifies the action that is carried out after messages are retrieved.
Folders	You can move messages to a folder. To do so, select the Move action.

If you select **Mailbox active**, emails are retrieved by this mailbox and then routed to the respective topic.

If you do not select **Mailbox active**, emails are received by the IMAP4 mailbox but not retrieved. Emails from customers to the company are received correctly by the upstream mail server.

Configuring a POP3 topic

Before you begin, configure the email settings.

When you use the POP3 protocol, the system retrieves messages from the inbox folder and then deletes them from the inbox folder.

1. Click Configuration > Topic > Create.
2. In the Topic - Create dialog box, enter a name for the new topic.

For example: Info1

3. Check the Email checkbox.
4. Click the Email tab.
5. Set the options and values as required.
6. Click Details.

The email address of the topic consists of the name and domain.

7. Set the required options and enter addition information as necessary.
8. Check the POP3 check box.
9. Enter the following settings:
 - a. In the **MailServer** field, enter the name of the mail server.
 - b. In the **Port** field, enter 110.
 - c. In the **User** field, enter the mailbox address.
 - d. In the **Polling interval** field, enter the interval at which all messages are retrieved.
 - e. In the **Password** field, enter the user's password.
 - f. In the **Confirm password** field, re-enter the password.
10. Click OK.
11. Click OK.

Configuring an IMAP4 topic

Before you begin, configure email settings.

This feature does not work with Secure Password Authentication.

1. Click Configuration > Topic > Create.
2. In the Topic - Create dialog box, enter a name for the new topic.
3. For example: Info1
4. Check the Email checkbox.
5. Click the Email tab.
6. Set the options and values as required.
7. Click Details.
8. The email address of the topic consists of the name and domain.
9. Set the required options and enter addition information as necessary.
10. Check the IMAP4 check box.
11. Enter the following settings:
 - a. In the **MailServer** field, enter the name of the mail server.

- b. In the **Port** field, enter 143.
 - c. In the **User** field, enter the mailbox address.
 - d. In the **Polling interval** field, enter the interval at which all messages are retrieved.
 - e. In the **Password** field, enter the user's password.
 - f. In the **Confirm password** field, re-enter the password.
 - g. In the **Action** field, specify the action to be carried out after messages are retrieved.
 - h. In the **Folders** field, specify the folder to which you want to move the messages after they are retrieved. You must select the **Move** action.
12. Click **OK**.
 13. Click **OK**.

Enabling the POP3 or IMAP4 connector

1. Open the Email configuration module.
2. Click **Components > C3000 POP3-IMAP4 Connector**.
3. In the C3000 POP3 IMAP4 Connector dialog box, enter the following settings:
 - a. In the **Maximum size of incoming messages (mega bytes)** field, enter a limit for the incoming messages. The default is 2 MB. The size also includes attachments, such as FAXes and bitmaps. If messages are not received, check the size of incoming messages and increase the limit if necessary. Coordinate this value with the customer's email system administrator. The limit in the Unified Media component must be great than or equal to the customer's email system limit.
 - b. In the **Maximum DB filling level in percent** field, enter a fill percentage at which the system stops retrieving messages.
 - c. In the **Polling interval in minutes** field, enter the time after which the gateway searches for new jobs. The default is 10 minutes.
4. Click **Save**.
5. Click **Close**.
6. Restart the service.

Next Steps

1. Send a sample email to the new email address you created for the topic. For example: Info1@company.com.
2. Sign on the IP Office Contact Center as an agent user in the agent group defined. For example: AG-Info1. The test message should appear in the inbox folder.
3. Use the UMR Administrator to manage email system connections and security.

Configuring Microsoft Exchange

Connecting to a Microsoft Exchange server

1. Click **Start > Control Panel > Administrative Tools > DNS**.
2. Click **DNS**, then select the Exchange server.
3. Click **Forward Lookup Zones**.
4. Right-click on the domain name and click **New Mail Exchanger...** on the pop-up menu.
5. In the **Host or child** domain field, enter a subdomain.
6. In the **Mail server** field, enter the mail server on which the C3000 SMTP connector is running.
7. Accept the default value in the **Mail server priority** field.
8. Click **OK**.

Creating a dedicated contact for each topic

1. Click **Start > All Programs > Microsoft Exchange > Active Directory Users and Computers**.
2. Click on the domain.
3. Right-click **Users** and click **New > Contact** in the pop-up menu.
4. In the **Last Name** field, enter a name for the topic contact.
5. Accept the default settings.
6. Click **Modify**.
7. Select **SMTP address** as the email address type.
8. Click **OK**.
9. In the **email address** field, enter a UMR address.
For example: service@umr.company.com
Important: The user must also exist on the C3000.
10. Click **OK**.
11. Click **Next**.
12. Click **Finish**.

Creating a distribution group

1. Click **Start > All Programs > Microsoft Exchange > Active Directory Users and Computers**.
2. Click on the domain.
3. Right-click **Users** and click **New > Group** in the pop-up menu.
4. Under **Group type**, select **Distribution**.
5. Under **Group scope**, select **Universal**.
6. In the **Group name** field, enter a group name.
For example: service
7. Click **Next**.

8. Accept the default settings.
9. Click **Next**.
10. Click **Finish**.
11. Double-click on the new distribution group or right-click and click **Properties**.
12. Click on the **General** tab.
13. In the **E-mail** field, enter an email address for the topic.
For example: service@company.com
14. Click **OK**.

Adding contacts to a distribution group

1. Click Start > All Programs > Microsoft Exchange > Active Directory Users and Computers.
2. Double-click on a distribution group or right-click and select Properties.
3. Click the Members tab.
4. Click Add.
5. Click Advanced > Find Now.
6. Select one or more contacts and click Add.
7. Click OK.
8. Click OK.

Adding a subdomain and a relay host

1. Click **Start > All Programs > Avaya > UMR Administrator > Components**.
2. Click the + in front of the computer and click **C3000 SMTP Connector**.
3. Under Local accepted DNS domains, enter the subdomain created in the previous task.
For example: umr.service.com
4. In the **Relay host for outgoing mails** field, enter the relay host responsible for external email traffic on the Internet.
5. Click **Save**.

Configuring blocked periods

You can configure blocked periods for a topic. The number (x) shows how many blocked periods are defined.

You can create, change or delete blocked periods.

What are blocked periods?

You can evaluate blocked periods in the Taskflow Editor. You have to use a logic unit to take the defined periods into account.

In the **Taskflow Editor**, blocked periods are used in a logic units. The term is q(?).blocked. The question mark is a placeholder for the topic. If the present time matches a blocked period for a topic, the term q(?).blocked is set to 1.

Note

Please note that other than holidays blocked periods are only valid for the selected topic.

Which settings can you configure for blocked periods?

You configure the following properties for blocked periods.

Property	Explanation
Repetition <input checked="" type="checkbox"/> None (one-time-only blocked period) <input type="checkbox"/> Daily (e.g. regular breaks) <input type="checkbox"/> Weekly <input type="checkbox"/> Yearly (e.g. national holidays)	Specifies the repetition of blocked periods. You can select whether a break is to be repeated daily, weekly, yearly, or not at all. An example of a daily repetition is the daily lunch break from 12:00 p.m. to 12:30 p.m.
Start of blocked period	You can set the date and time you want a blocked period to start. If you set <input checked="" type="checkbox"/> Daily or <input checked="" type="checkbox"/> Weekly, you can only set the time. If you set <input checked="" type="checkbox"/> Weekly, you can select a day. You can enter the time or use  (up and down) to set the time. You can enter the date or click  . A calendar in month view opens. A red circle  indicates today's date. A blue circle  indicates the set date.
End of blocked period	You can set the date and time you want a blocked period to stop. The settings are the same as for the start of the blocked period described above. The end of the blocked period must be after the start.

Configuring job codes

You can choose whether you want to use job codes for a topic.

If you want to use job codes select Use job code. The predefined job codes are displayed with code and name for the selected job code length.

You can insert, change or delete job codes.

What is a job code?

You can enter a job code with every agent workplace. Job codes are used for reporting evaluations or to assign calls to certain processes and activities.

With analog telephones the agent can enter a job code during the ACW. With digital telephones (TH13, TM13, TS13) and PC workplaces the agent can enter any number of job codes during the call or during the ACW.

For a topic you can determine whether a job code has to be entered (mandatory job code). If the agent must enter a job code he is not assigned another call until the job code has been entered.

Which settings can you configure for job codes?

You can enter a fixed job code with a description.

properties

Property	Explanation
In this topic	You can define whether a job code is used or whether a job code must be entered for the topic (mandatory job code).
<input checked="" type="checkbox"/> Do not use job codes	
<input type="checkbox"/> Use job codes	
<input type="checkbox"/> Mandatory job code	
Job code length	You can set the job code length between 1 and 20 digits.
Predefined codes	A list shows the predefined job codes. You can insert, change and delete job codes.
Code	You can only use digits for the code. With job code length you determine the number of digits to be entered.
Name	Shows a description of the code. You can use 29 alphanumeric characters maximum.

Configuring skills

You can insert skills for each task type of a topic or an agent and define the respective skill levels.

The **Topic skills or Agent skills** dialog shows the **Skill** tab.

For information on skills and how to work with them, see [What is skill-based routing?](#).

Skill tab

The **Skill** tab shows the defined skills with name and skill level.

You can use the **Skill** tab to skills and skill levels to be valid for the respective topic or agent.

Skills for task types

You can configure skills for Telephony tasks for a topic and skills for Email tasks separately.

Topic overflow

You can select the following settings for a topic overflow.

- Get original skills
- Set own skills

You can use the following four combinations.

Option	Setting	Explanation
1. Option	<input type="checkbox"/> Get original skills	Skills or the dialed-in topic are deleted.
	<input type="checkbox"/> Set own skills	The skills of the overflow topic are not added.
2. Option	<input type="checkbox"/> Get original skills	Skills or the dialed-in topic are deleted.
	<input checked="" type="checkbox"/> Set own skills	The skills of the overflow topic are added.
3. Option	<input checked="" type="checkbox"/> Get original skills	Skills or the dialed-in topic are retained.
	<input type="checkbox"/> Set own skills	The skills of the overflow topic are not added.
4. Option	<input checked="" type="checkbox"/> Get original skills	Skills or the dialed-in topic are retained.
	<input checked="" type="checkbox"/> Set own skills	The skills of the overflow topic are added.

Please note that in the case of a dialed-in topic all skills of the dialed-in topic are added independent of the configuration of the Get original skills and Set own skills parameters.

To delete skills specifically for a call or email you must use a tag operation to set the skill to zero in the task flow set.

Which actions can you execute with the Topic skills and Agent skills tabs?

You can execute the following actions in the **Topic skills** or **Agent skills** dialog. There is a button for each action.

Action	Explanation
Insert	Opens the Select skill dialog. You can select a skill.
Delete	Deletes the selected skill.

To change a skill you can edit the name and skill level directly in the list.

The skill level shows how high the agent's skills and knowledge have to be in a certain area, so that he is assigned the respective task (call or email). The skill level is given in percent. A minimum of 0 and a maximum of 100 percent are possible for a skill level.

Skill

The **Select skill** dialog shows the names of the skills of the tag list.

You configure skills in the **System** menu under **Tag list**.

Skills-based routing optimization

Use skills-based routing to connect call center customers to agents who are uniquely qualified to deal with their problems, questions and requests. Configure agent skills, skill levels and task flows to distribute contacts to the most qualified agents.

To configure skills-based routing, you need to set skill tag names and then set topic and agent skill levels.

Skills and skill levels

Every call center agent has certain skills which consist of their knowledge and abilities. Skill levels quantify agent knowledge and abilities and indicate how good an agent's skills are in a certain area.

To configure skills-based routing, create skill topics that equate to knowledge and ability areas and set skill levels for each skill using percentages. Identify the skill levels required to manage customer calls and emails regarding specific topics and route those contacts to the appropriate agents. You can assign more than one skill to agents and topics. To route a contact, all criteria must be met. For example, the following list shows skills and skill levels for agents that are fluent in English, have some fluency in German, and do not speak French.

Skill	Skill Level
Agent is fluent in English	100
Agent is fluent in German	80
Agent is fluent in French	0

If you set up the task flow appropriately, when a customer calls and requires an agent that speaks French, the system will not route the call to an agent that does not speak French.

Task Flows

The system routes all incoming contacts for a specific topic to available agents in an agent group. When a contact requires an agent with specific skills, that affects how the system distributes contacts within the group. The system can use two different methods to determine how to distribute contacts to agents:

- Default task flows
- Customized task flows

Default task flows

By default, if you define agent skills for skill topics and do not change the task flows, the system distributes contacts to the best suited agent. When multiple criteria are required, the system uses the following formula to determine how to route the call:

Total skill level = skill_1+skill_2+ ...+skill_n.

If more than one agent has the same skill level, sometimes referred to as skill grade, the system chooses the agent with the highest agent group priority. The system sets priority by determining which agent has gone the longest time with no contact. Agents that lack at least one required skill are excluded from contact distribution.

Customized task flows

Modify the default task flow to sort the agent group according to a certain skill and select ascending or descending order. Agents that lack the required skill level are excluded from contact distribution. The system determines the most qualified agent (descending order) or the agent with the minimum skill level (ascending order) to process the contact. Both kinds of sorting meet specific operational goals. Use descending order to assign agents that are best qualified to handle a topic. Use ascending order to ensure the most qualified agents remain available while training less skilled agents.

In the case where no agents meet the criteria for an incoming contact, you can define a task flow to distribute the call to the most qualified agent. Use this method to temporarily reduce the skill level required for a contact. Use a static or global variable valid for all contacts or manage contacts dynamically within the task flow.

Static call distribution

Use the global variable `g.skillFactor` to temporarily reduce a skill level. If this parameter has a value less than 100, all skills for that topic are reduced by that factor. For example, if you set a skill level of 60% and `g.skillFactor=50`, the skill requirement is reduced to 30%. You can change the `g.skillFactor` during configuration or in real-time.

Dynamic call distribution

You can dynamically change skills and skill level values, defined with tags attached to an incoming contact, by changing the tags. You can lower the level. This method only affects the specific contact.

Configuring skill tag names

To use dynamic skills-based routing, configure skills by giving the skills descriptive tag names.

1. Click **System > Tag list > Add**.
2. In the **Tag (Create)** dialog box, enter a tag name.
For example, `A_speaks_German`.
3. Select **Skill** as the type.
4. Click **OK**.
The new tag appears in the list.
5. Add more tags to the list if necessary.
6. Click **OK** to save the tags.

Configuring topic skills and skill levels

Before you begin, you must configure skill tag names.

1. Click **Configuration** and select the **Topic** tab.
2. Double-click a topic to edit its properties.
3. Click the tab of a task type.
For example, click **Telephony**.
4. Click **Skills**.
5. In the **Topic Skills** dialog box, double-click a tag which equates to a skill.

6. Enter a skill level.

The value determines the skill level as a percentage; 100 is the maximum level. Use this setting to specify the agent's minimum skill level requirement to handle a contact tagged with that tag.

7. Click **OK**.

The tags and skill levels appear in the list.

8. Add more skill levels as necessary.
9. Click **OK** to save the skill configuration.

Configuring agent skills and skill levels

Before you begin, you must perform the following.

- Configure skill tag names.
- Configure topic skills and skill levels. You must configure skill levels for all skills for each agent.

1. Click **Configuration** and select the **Agent** tab.

2. Double-click an agent to edit the properties.

3. Click **Skills > Add**.

4. In the Create skill dialog box, double-click a tag which equates to a skill.

5. Enter a skill level for a skill.

The value determines the skill level as a percentage; 100 is the maximum level. Use this setting to specify the agent's skill level for this skill.

6. Click **OK**.

The skill levels appear in the list.

7. Add more skill levels as necessary.

8. Click **OK** to save the configuration.

Using statistical values in the task flow

Use statistical values in task flows to control call distribution. Adjust call distribution by setting service level thresholds in the task flow. Use the TSF or Accept level setting to adjust thresholds. In contact centers where only the acceptance rate must be guaranteed, use the Accept level setting.

Configure a statistical value consisting of TSF, accessibility, and average wait time as a variable in the Monitor_srv process and store it in the database. After restarting the system, the last stored variable will be used. The first update occurs after 15 minutes to allow sufficient statistical values to collect for a reliable calculation.

Note: The monitor values are valid for the Telephony task type.

Configure the following parameters in a topic:

1. Configure the TSF parameter Mon_TSF with a start value of 100.
2. Configure the Accept level parameter Mon_AcceptLevel with a start value of 0.
3. Configure the Average wait time parameter Mon_AvgTConvWait with a start 21 value of 0.

Scenario: Routing calls based on an agent's product knowledge

This scenario describes the system uses skills-based routing to distribute contacts to agents based on a specific level of product knowledge. In this scenario, skill tag names were set up using the Telephony task type and three agents are signed on and available. Without sorting according to skill, the system determines the most qualified agent by using the following formula: knows product A+knows product B.

The following skills are configured for a topic called 4711 in this scenario:

- Knows product A
- Knows product B

For an incoming contact tagged with topic 4711, an agent must have a skill level of 50% for product A and a skill level of 70% for product B in order to be connected to the contact.

	Skill: Knows product A	Skill: Knows product B
Topic skills and skill levels		
4711	50	70
Agent skills and skill levels		
Agent 1	90	70
Agent 2	70	80
Agent 3	40	100

Routing without sorting according to skill

Without any task flow configuration and based on the settings above, the system handles contacts as follows:

- Agent 1 and Agent 2 get calls related to topic 4711.
- The agent who has been available for the longest period of time receives calls first.
- Agent 3 does not get any calls for topic 4711.

Routing with descending sorting according to skill

With a task flow configured with a descending sort, the system handles the contacts as follows:

- Agent 1 gets calls for topic 4711 if he is available.
- Agent 2 gets a call for topic 4711 only if Agent 1 is not available.
- Agent 3 does not get any calls for topic 4711.

Configuring routing

You can set the hold time and minimum contact time for the last agent last agent function. You can also configure how the Last agent, Current agent and Personal contact objects are handled in IP Office Contact Center system routing.

Options for routing calls and emails

If you use the kernel process

The kernel process processes calls and emails for assigned objects.

The sequence of objects determines the priority. The top object has first priority, the next has second priority and so on.

If you use the vectors process

The vectors process processes calls and emails for assigned objects.

You must define how calls and emails are routed in terms of the last agent, current agent and personal contact in the task flow.

Recommendation for high load systems

To reduce the load in high load systems and reduce the number of calls and emails routed by the vectors process, we recommend using the rules defined for the last agent, current agent and personal contact objects in the kernel process.

Last agent function

The times for configuring the last agent are entered in this dialog.

Action	Explanation
Hold duration	<p>Shows the hold duration for emails in hours and minutes. Use the format hh:mm (hours, minutes).</p> <p>The hold duration defines how long the assignment between the caller or sender and agent is saved. For calls the duration begins after the conversation ends. For emails the duration begins after the email is sent.</p>
Minimum contact time	<p>Shows the minimum contact time for emails in hours and minutes. Use the format hh:mm (hours, minutes).</p> <p>The minimum contact time defines the minimum time a contact between the caller and agent must exist or the minimum time an agent must process an email. If the minimum contact time is not reached, a call or email is not included in the last agent function.</p>

Routing functions

You can compile lists for task flow (vectors) and automatic (kernel) as required.

Button	Explanation
>>>	Inserts the selected object in the Automatic list (kernel).
<<<	Inserts the selected object in the task flow list (vectors).
Up	Use Up and Down to determine the priority when you use the kernel process to route objects.
Down	

Creating a keyword-based email routing task flow

You can create a task flow that distributes emails based on words contained within them.

Configure a script and create an email flow. The script can contain up to 10 keyword patterns. The system evaluates each keyword pattern separately. A keyword pattern can contain 200 keywords. The system executes the script checking the text of the email for designated keywords and if it finds a match, then it sets a special task tag to true.

1. Create a script.
 - a. Click **Start > All Programs > Avaya > UMR Administrator**.
 - b. Click the **E-Mail script** tab.
 - c. Click **Add**.
 - d. In the Name field, enter a name for the script.
The script name can contain up to 29 alphanumeric characters.
 - e. To add a keyword pattern, click **Add**.
Patterns can include special characters.
 - f. To edit a keyword pattern, click the **Edit** button.
 - g. Click **Apply** to apply the keywords.
 - h. Click **Save**.
2. Test the keyword pattern.
 - a. In the Edit configuration dialog box, click **Test**.
 - b. In the Text configuration dialog box, enter a text message.
 - c. Click **Test**.
 - d. Click **Close**.
3. Create an email task flow.
 - a. Click **Start > All Programs > Avaya > Task Flow Editor**.
 - b. Create an E-mail flow with the E-Mail script and Task Tag elements.
 - c. Save the task flow set.
 - d. Activate the task flow set.
 - e.

Configuring announcements

You can assign announcements to direct incoming or transferred calls to the topic. You can choose from DSPF or voice unit (VU) texts or MHX1 to MHX4 (music on hold).

You have to configure the announcement texts first.

You can only use this feature for the task type **Telephony**.

For hold announcements you can select either a voice unit announcement script or a time slot (MHX).

What are direct incoming calls?

Direct incoming calls are calls to the topic directly via the VDN.

What are transferred calls?

Transferred calls are calls that originally dialed into another topic and were transferred to this topic by an agent or the call distribution.

Which settings can you configure for the announcement text assignment?

A list shows the following information for the selected type.

- Number
- Name
- Interruptible

You can insert, delete, play and change the sequence of announcement texts.

What are hold announcements?

Hold announcements are announcements played to subscribers while they wait.

Editing a topic: chat tab

You can configure the respective properties if you enable a topic for the task type chat.

You have to configure a user in the chat server. This user is a chat topic in the IP Office Contact Center system. You will need the username and password in order to identify the user.

Settings

You have to configure the following settings.

TaskServer

Select a chat taskserver. If a chat taskserver is configured, then it is automatically used. A chat taskserver can manage one chat server.

Jabber Identifier

A Jabber Identifier enables addressing a user on a chat server.

The scheme if a Jabber Identifier has the following form,

Example:

topic1@domain.com/ipocc

Node @ Domäne / Resource

The first part is the address of the node. Node represents the user name. Enter the user name. The complete Jabber Identifier is composed of the IP Office Contact Center system. The domain is derived from the selected taskserver. The IP Office Contact Center system uses ipocc as resource.

Password

Enter the password of the user of the chat server.

Announcement text

Enter an announcement text.

Automatic text at

You can select an automatic text for the following states. An automatic text is configured as chat script.

- Reject
- Hold
- End

Job code

You can configure job codes for the topic.

Reporting/Realtime information

You can use the default values for reporting and realtime information or set other values.

You determine the default values using the system settings.

Skills

You can select the agents' skills for the task type chat.

Configuring agent groups

What is an agent group?

An agent group consists of a group of agents. An agent group processes tasks for one or several topics. An agent group distributes a call to the next available agent. Agents have to sign on to the agent group. Calls are distributed to agents either according to hierarchical or available-time criteria.

Please note that some settings are valid for internal call distribution only.

What does the Agent group tab show?

The **Agent group** tab lists all configured agent groups. The following information is listed.

Header	Explanation
Name	Shows the name of the agent group.
Virt. AG AG	Shows whether the agent group is a virtual agent group.
Tel	Shows whether an agent group is configured for task type Telephony.
Email	Shows whether an agent group is configured for task type Email.
PBX	Shows the PBX of the agent group.

How many agent groups can you configure?

You can configure 250 agent groups maximum for one PBX.

Note that you need the necessary licenses.

What do you need to change the name of an agent group?

You need the corresponding special privilege to change the name of an already configured agent group.

Which actions can you execute with the Agent group tab?

You can execute the following actions with the Agent group tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected agent group. You can edit the properties.
Create	Creates a new agent group.
Create virtual AG	Creates a virtual agent group.
Copy	Copies the selected agent group.
Delete	Deletes the selected agent group.

What is a virtual agent group?

To route calls over several PBXs in a call center network, you can combine some physical agent groups to form a virtual agent group.

In a virtual agent group agents are only assigned indirectly.

For further information see also: [Creating a virtual agent group](#)

Assignment

The following rules apply to the assignment.

- A physical agent group can be assigned to only one virtual agent group.
- A virtual agent group can work for several physical agent groups.
- The physical agent groups of a virtual agent group can be of several PBXs or just one PBX.
- Physical and virtual agent groups can be assigned to an agent.

Agent signon and signoff

If an agent signs on to or off from a physical agent group the agent is also signed on to or off from assigned virtual agent groups.

If several physical agent groups with the same virtual agent group are configured for an agent, the agent is signed on to the virtual agent group as soon as he signs on to the first physical agent group.

The agent is signed off from the virtual agent group as soon as he signs off from the last physical agent group.

If an agent is signed on to a virtual agent group via the UI, all physical agent groups of the assigned virtual agent group are signed on as well.

Priority

The priority of a virtual agent group for an agent matches the most important (lowest) priority of the assigned signed-on physical agent group.

The following actions change the priority of a virtual agent group.

- Changing the priority of a physical agent group
- Signing on to or off from a physical agent group
- Adding or removing a physical agent group for an agent
- Configuring or deleting the assignment of a physical agent group with a virtual agent group

Task flow set

Routing in a task flow set via a virtual agent group matches the behavior of a routing via a physical agent group. For assignment to an agent only one of the assigned, signed-on, physical agent groups is signaled to the PBX. PBXs know only the physical agent groups.

Note on Realtime information

The Realtime information area of the **user interface** shows agent group-dependent realtime information, like the realtime agent status information for virtual agent groups and physical agent groups.

Icon

The **Configuration** module uses the following icon for virtual agent groups.



Editing an agent group: General tab

With the general settings you can configure name, task type, variable and the assignment to a virtual agent group.

The general settings are valid for all task types.

Name

Shows the full name of the agent group. The name must be unique system-wide. You can use 29 alphanumeric characters maximum.

No brackets () [] { }

Please note that you must not use any brackets for the name of an object.

No characters @ " ' % ! \ < > | / ? =

Please note that you must not use these characters for the name of an object.

Task type

Shows the task types of the agent group. You can configure an agent group for the following task types. A new tab opens for each task type. You have to enter the respective settings.

- Telephony
- Email
- Chat

Variables

Shows the variables for the object virtual agent group. You can add, change or delete variables.

Virtual agent group

Shows whether the agent group is assigned to a virtual agent group.

You can select a virtual agent group for the agent group. An agent group can be assigned to **only one** virtual agent group.

Editing an agent group: Telephony tab

You can configure the respective properties if you enable an agent group for the task type Telephony.

View option

Shows the name of the agent group. You enter the name with the general settings.

PBX

Shows the PBX. If more than one PBX is configured, you must select a PBX when you create the task type Telephony.

Number

Shows the number of the agent group at the PBX. The PBX assigns the number, a free number to the agent group. When you delete an agent group the respective number is free again.

Call distribution

Specifies the type of routing.

Hierarchical

Hierarchical means that within a priority level the call is assigned to the agent who signed on to the agent group with this priority first. If this agent is not available the call is assigned to the agent who signed on second etc. The next priority level is searched only if no agent of the respective level is available.

Available longest

Incoming calls to the agent group are assigned to available agents who signed on to the agent group with priority 1. The call is signaled at one terminal only. Available longest means that calls are assigned to available agents with the same priority successively, so that an even distribution within a priority level is achieved.

If all agents of an agent group with priority 1 are busy the agents with priority 2 are taken into account next.

This procedure is repeated until all priority levels of the agent group are checked.

Depending on the number of calls and the average wait time in the queue, additional calls can overflow to another queue.

In the case of an overflow the call is queued into another queue. Seen from the original queue an assignment referring to available time is no longer possible.

If several agents are available the call distribution assigns new calls in chronological order, that is according to available times. The agent who has been available longest is assigned the next call.

Idle time description

The idle time (longest available) is ACD call related.

Idle time starts: agent signs on to first agent group

Idle time is reseted: agent signs off from last agent group

Idle time is reseted: agent is working for ACD and gets free

Idle time is reseted: agent ends pause

Idle time is reseted: ACW ends (does not matter if automatic or manual)

Direct calls does not affect the idle time, neither inbound nor outbounds calls. So if a receptionist transfers a call directly to an agent the idle time continues because it is a none-ACD-call.

Queue factor

Specifies the queue factor. The queue factor and the number of agents signed on to the group determine the size of the agent group queue. Calls that cannot be queued get busy tone. Enter the queue factor in the Queue factor input box.

50 is the maximum value.

Note that the queue factor is only evaluated for routing using the IP Office Contact Center system.

Overflow factor

Specifies the overflow factor in percent. Incoming calls are transferred to the defined overflow groups if the queue load in percent exceeds the defined overflow factor. Enter the overflow factor in % in the Overflow factor input box.

100 % is the maximum value.

Announcement factor

Specifies the announcement factor in percent. As soon as the position of a call in the queue is below the announcement factor, the call is connected to a defined announcement. Enter the announcement factor in % in the Announc. factor input box.

100 % is the maximum value.

Ring timeout

Specifies the ring timeout in seconds. A workplace is signed off from the call distribution for all agent groups, if a call is not answered until ring timeout. An agent is also logged out, if a signoff prevention is configured. In the Ring timeout box, enter the time in seconds after which a workplace is to be signed off from call distribution.

The ring timeout configured for the agent group assigned to the topic is always used. It does not matter which agent group processes the call.

180 seconds is the maximum value.

Urgent info

Specifies the three values for urgent information in percent.

If the load on the queue exceeds one of the values normal, medium or high, this information is given to a PC or TH13 workplace.

Signaling threshold

Specifies the signaling threshold in percent.

Enter in this box from which degree of change of the queue the realtime information display of this agent group is to trigger an update. (0% = after every change, 30% = only after a 30% change in the queue). The signaling threshold is only valid for telephone not for PC terminals.

30% is the maximum value.

Routing number

Displays an alternative routing number. A call to the agent group is transferred to the defined number via trunk or tie line.

Agents can be assigned to this agent group but no agent can sign on to the group if a routing number is entered. It is thus possible e.g. to redirect an agent group with assigned agents for a certain time without having to change the assignment of agents.

Signoff prevention

Shows how many agents have to remain signed on to the agent group. Only as many agents as permitted by the quota can sign off. No further agent of this agent group is allowed to sign off. The signoff prevention is suspended, if the ring timeout is exceeded.

255 is the maximum value.

Overflow groups

Displays the overflow groups. Up to four groups can be entered as overflow groups in the input field. Calls are transferred to the next defined overflow group as soon as the overflow factor is exceeded. The order of the list determines the order of the overflow groups.

Night service group

<None> or the configured night service groups are listed.

During night service, calls to the agent group are forwarded to another agent group, the night service group. Night service for an agent group is automatically activated as soon as the last agent of the group signs off from call distribution.

Reporting/Realtime information

You can use the default values for reporting and realtime information or set other values.

You determine the default values using the system settings.

Agents

Shows the agents assigned to this agent group with priority, name and number.

Editing an agent group: Email tab

You can configure the respective properties if you enable an agent group for the task type Email.

Signoff prevention

Shows how many agents have to remain signed on to the agent group. Only as many agents as permitted by the quota can sign off. No further agent of this agent group is allowed to sign off. The signoff prevention is suspended, if the ring timeout is exceeded.

255 is the maximum value.

Agents

Shows the agents assigned to this agent group with priority, name and number.

Reporting/Realtime information

You can use the default values for reporting and realtime information or set other values.

You determine the default values using the system settings.

Editing an agent group: chat tab

You can configure the respective properties if you enable an agent group for the task type chat.

Agents

Shows the agents assigned to this agent group with priority, name and number.

Reporting/Realtime information

You can use the default values for reporting and realtime information or set other values.

You determine the default values using the system settings.

Creating a virtual agent group

A distinction is made between physical and virtual agent groups.

A physical agent group is permanently assigned to a PBX. Thus only agents of this PBX can sign on to this agent group.

Multiple physical agent groups can be assigned to one virtual agent group. Agents of several PBXs can thus work for one virtual agent group.

Restriction

A physical agent group can be assigned to **only one** virtual agent group.

Prerequisites

In order for a virtual agent group to be available across several PBXs certain prerequisites are necessary.

You need to configure a physical Call Center network across several PBXs and create and configure the connections between the PBXs. You will need network lines between the PBXs which are appropriately configured in the PBXs. Calls can then be transferred from one PBX to another. You need to carry out these configuration steps in the PBXs and in the IP Office Contact Center system.

For further information see:

- Editing a PBX
- PBX cluster

Notes on assigning agents

In order to implement a Call Center network and assign physical agent groups from different or the same PBXs you need to configure the physical agent groups, and assign the physical agent group to a virtual agent group. The configuration part of the virtual agent group only shows the allocation of the physical agent group.

Configuration using an example

To set up a virtual agent group:

Step 1

1. Click the **Agent group** tab or choose **Agent group** in the **Configuration** menu.
2. Click **Create virtual AG**. The [virtual agent group] - Create dialog opens.
3. Enter a name for the virtual agent group.
4. You can assign variables or TaskTags to a virtual agent group, and those can be used in the CallFlow set. These variables or TaskTags can be queried from the CallFlow set and used for other purposes. To insert a variable click **Variable**.
5. To save your settings click **OK**. The virtual agent group is now configured.

Step 2

Now you can assign the virtual agent groups to the agent groups.

1. Click a (non-virtual) agent group which you have created.
2. Click  in the **General** tab.
3. Double-click the virtual agent group you have created.
4. Click **OK** to save the settings
5. Repeat steps 1 to 4 for all agent groups that you want to combine in a virtual agent group.

Example: Variable for virtual agent group

You can allocate variables and TaskTags to a virtual agent group.

Example

Every 10th caller to the virtual agent group hears a greeting.

Procedure

Add a variable to the virtual agent group. In the CallFlow set increase the value of this variable for each call to the agent group. You can now check the CallFlow set to see whether this call will be answered by a greeting before the call gets routed to an agent in the virtual agent group.

Settings for virtual agent group

Virtual agent group

Shows the name of the virtual agent group.

Shows the physical agent groups assigned to this virtual agent group.

Variables

Shows the variables for the object agent group. You can add, change or delete variables.

Assignment

On the **General** tab for a physical agent group, you can assign the agent group to a virtual agent group.

Configuring agents

What is an agent?

Any user of the IP Office Contact Center system is called an agent. It makes no difference whether the user is working with a telephone or a correspondingly equipped PC.

Please note that depending on the task type the agent uses different tools (e.g. a telephone).

What does the Agent tab show?

The **Agent** tab lists all configured agents. The following information is listed.

Header	Explanation
Name	Shows the agent's name
Tel	Shows whether an agent is configured for the task type Telephony.
Email	Shows whether an agent is configured for the task type Email.
Subscriber number	Shows the agent's number.
Email address	Shows the agent's email address.
PBX	Shows the agent's PBX.

How many agents can you configure?

You can configure up to 1,000 agents maximum in a PBX.

Which actions can you execute with the Agent tab?

You can execute the following actions with the Agent tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected agent. You can edit the properties.
Create	Creates a new agent.
Copy	Copies the selected agent.
Delete	Deletes the selected agent.

Editing an agent: General tab

The **General** tab lets you define the general properties for an agent.

The general settings are valid for all task types.

System name

Shows the display name within the system. Assign a name to the agent. The name must be unique system-wide.

You can use 29 alphanumeric characters maximum.

No brackets () [] { }

Please note that you must not use any brackets for the name of an object.

No characters @ " ' % ! \ < > | / ? =

Please note that you must not use these characters for the name of an object.

Login name

Name and password identify an agent upon login.

You can use 29 alphanumeric characters maximum.

Alias

Shows the agent's alias. You can use this alias with the **Reporting** module for anonymous reporting. The agent usually creates his own alias.

You can use 29 alphanumeric characters maximum.

Automatic Login through Windows User Account

You can configure an agent so that the agent is identified in the IP Office Contact Center system with his/her Windows user account. The agent can then start the **Contact Center User Interface** application without having to log in to the IP Office Contact Center system.

This function is also called a single sign-on (SSO) or one-time login.

User Name

Shows the Windows user name. The login name is automatically incorporated.

Domain/Computer

Indicates the domain or the computer which the user is login into. The selection list shows previously used domains or computers.

Language

Specifies the language for IP Office Contact Center modules. IP Office Contact Center modules open in the respective language (menus, commands, dialogs).

Assign a language to the user by clicking it in the list. After login, all language-specific parts (including regional formats) of the system are presented in the selected language.

Task type

Shows the task types for which the agent is configured. You can configure an agent for the following task types. A new tab opens for each task type. You have to enter the respective settings.

- Telephony
- Email
- Chat

Last name

Shows the agent's last name. You can use 29 alphanumeric characters maximum.

First name

Shows the agent's first name. You can use 29 alphanumeric characters maximum.

Employee ID

Specifies the agent's employee ID. If you want you can enter the user's internal company code. This entry is optional.

You can use 29 alphanumeric characters maximum.

Cost center

Specifies the agent's cost center. If you want you can enter the user's internal company cost center. This entry is optional.

You can use 29 alphanumeric characters maximum.

Title

Specifies title for the agent. You can select either Mr. or Mrs.. The selected title is passed on to the module.

Predefined profile

Specifies a predefined profile or <None> for the agent.

You can use a predefined profile for the agent. Please note that changing the predefined profile will affect this agent.

You cannot change the group assignment and authorization of a predefined profile with the agent configuration. You have to change these settings with the Agent profile configuration.

Address book profile

Address book profiles let you define which agents can read which address books and which they can import.

The address book profile serves also for the phone book function in the module Firstscreen.

Password

Specifies the agent's password. The agent can change his password anytime.

Password conditions

The password must contain at least eight characters.

To keep the password secret an asterisk (*) is displayed for each digit when the password is entered.

For security reasons, there is no default password.

You must enter a password.

You can use the following types of characters in the password:

- Lower case letters
- Upper case letters
- Digits
- Special characters

You must use characters from at least two of these groups.

Sample password

MyPassword_01

This example uses characters from all groups.

2. Password

For an agent with "four-eye principle" privilege you have to enter a password for a second person.

Please note that the second person cannot change this password.

If you do not have the "4-eye-principle" privilege, you cannot configure this setting.

Variables

Shows the agent's variables. You can add, change or delete variables.

Skills

The Agent skills dialog shows skills and skill levels defined for the agent. The agent's skills are valid for all task types.

You can insert, change and delete skills.

You can change a skill directly in the list by changing name and skill level.

The skill level shows how high the agent's skills and knowledge are in a certain area. The skill level is given in percent. A minimum of 0 and a maximum of 100 percent are possible for a skill level.

Availability

For each task type the **Availability for Tasks** dialog shows which conditions have to be met so that no further tasks are assigned to the agent.

You can customize the settings for an agent or use the default settings. You determine the default settings for **Availability for Tasks** with the **System** menu.

For further information see [Availability for Tasks](#).

Privileges

You can change or view the agent's privileges.

For further information please refer to: Which privileges are there?

Authorization

Shows the agent's authorizations. You can determine which topics, agent groups, agents, teams and workplaces the agent can work with.

Topic

You set which topics the agent can use.

Agent group

You set which agent groups the agent can use.

With the AG (agent group) authorization it is determined for which agent groups an agent can process tasks if he has the **Select AG** privilege.

For agents with privileges like Realtime information, Reporting or Agent group configuration, AG authorization determines for which agent groups they can execute these functions.

Agent

You set which agents the agent can configure.

The agent needs to have the Agent configuration privilege.

Team

You set which teams the agent can configure.

Telephone

You set which workplaces the agent can use.

Telephone group

You set which telephone group the agent can use.

Campaign

You set which campaign the agent can edit and view in the module dialer.

Editing an agent: Telephony tab

A subscriber (also called DTE xxx) is an agent for the task type Telephony.

An agent can be work with a telephone or a PC.

A PC is connected to the PBX. You can use the full scope of the **Configuration** module.

You can configure the respective properties if you enable an agent for the task type Telephony.

Telephony name

Shows under which name the agent is configured at the PBX.

You can use 18 alphanumeric characters maximum.

PBX

Shows the PBX. If several PBXs are configured you need to select a PBX when you create the task type Telephony.

Subscriber number

You can enter the call number optional.

Number of connections

Shows the number of connections. You can choose between 1, 2 or 30 connections. During external call distribution, only the number 1 is supported, a different setting can lead to errors.

ACW

Shows the ACW.

The ACW determines when an agent who processed a call for this agent group is assigned the next call. The ACW starts at the end of a call.

You can increase or decrease the ACW for the agent in percent.

You can increase the ACW up to 999% maximum.

You configure the ACW when you configure topics.

100% is set as the default for the ACW.

Routing logout

Specifies the number calls are transferred to if the agent is not logged in to the IP Office Contact Center system.

Group assignment

Shows the agent groups the agent or the agent profile for the task types Telephony or Email are assigned to. You can use a priority between 1 (highest) and 5 (lowest) for each agent group. You can select the priority directly in the list.

You can insert or delete agent groups and change the order with the **Up** and **Down** buttons.

Password

Specifies the agent's password for the telephone. To keep the password secret an asterisk (*) is displayed for each digit when the password is entered.

The password can consist of maximally nine numbers.

Editing an agent: Email tab

You can configure the respective properties if you enable an agent for the task type Email.

Mailbox

Shows the agent's mailbox. You can change the properties.

Click the **Details** button to specify the mailbox details.

Mailbox details

You can specify the following details for a mailbox.

Setting	Explanation
Email	Shows the agent's email address.
Reply to	Specifies the reply address for a received email. If an agent uses the Reply function to reply to an email, the Reply to address is used. The Reply to address is not necessarily the sender's address. This option is primarily used to control replies to emails the agent sends.
From	Shows the agent's sender address.

Group assignment

Shows the agent groups the agent is assigned to for the task type Email. A priority between 1 (highest) and 5 (lowest) can be defined for each agent group.

You can insert or delete agent groups and change the order with the **Up** and **Down** buttons.

Editing an agent: Chat tab

You can configure the respective properties if you enable an agent for the task type Chat.

Settings

You have to configure the following settings.

TaskServer

Select a chat taskserver. If a chat taskserver is configured, then it is automatically used. A chat taskserver can manage one chat server.

Welcome text

Select a welcometext. A welcome text is configured as chat script.

Group assignment

Shows the agent groups the agent is assigned to for the task type Chat. A priority between 1 (highest) and 5 (lowest) can be defined for each agent group.

You can insert or delete agent groups and change the order with the **Up** and **Down** buttons.

Which privileges are there?

Privileges are divided into tabs.

What are privileges?

Privileges let you control which modules in the IP Office Contact Center system an agent can use and which actions the agent can carry out within the modules. You can also determine whether the agent may pass on his privileges or not.

Setting privileges

Proceed as follows to set privileges.

1. On the **Agent** tab, double-click an agent.
2. Click **Privileges**.
3. Select privileges. You can assign certain privileges to an agent. The agent can only pass on his privileges to other agents if you also select the corresponding **P** (pass on) box.
4. Click **OK** to enable the privileges.

What does P mean?

P stands for pass on. You can choose whether an agent may pass on the respective privilege or not.

Privileges: Agent

You can set the following privileges for an agent.

Privilege	Meaning
Change password	The agent can change his password.
Change alias	The agent can change his alias. The alias can be used for reporting evaluations.
Call routing logged-out user	The agent can activate a call routing for the time he is logged-out.
Automatic sign on (Tel.)	The agent (e.g. an answering machine) is automatically signed on to call distribution.
Agent group assignment	The agent can assign himself to an agent group.
Terminal pause controls e-mail pause	If the privilege Terminal pause controls e-mail pause is set for an agent, then if the agent set pause with the terminal automatically pause is set for e-mail.
Job code input	The agent can enter a job code. This privilege is not needed for IP Office Contact Center PBXs. The adjustment is set in the topic.
Mandatory job code input	The agent must enter a job code for every call. The agent stays in ACW until a job code is entered. If you select Mandatory job code input you also have to select Job code input or the agent cannot enter a job code. This privilege is not needed for IP Office Contact Center PBXs. The adjustment is set in the topic.
Outgoing job code	The agent can enter a job code for outgoing calls.
Extend wrap-up time	The agent can extend the ACW.
Chat	
Automatic sign on	The agent is automatically signed on to all assigned agent groups.
Advanced archive view	The agent Can use the chat archive.
Server-specific	

Privilege	Meaning
Four-eye principle	With this privilege certain data can only be surveyed by two persons at a time. A second password is required to retrieve this data. Two passwords have to be defined in the agent configuration. An agent with the four-eye principle cannot log in on his own. He can only log in together with a second person (second password).

Privileges: UI

You can set the following privileges for the UI.

Privilege	Meaning
Home	
Select own home file	If you select the Select own home file privilege, the agent can select which realtime information he wants to view.
Home configuration	If you select the Home configuration privilege, the agent can configure realtime information for all agents.
First screen	
Select own first screen	If you select the Select own first screen privilege, the agent can select which first screen he wants to view.
First screen configuration	If you select the First screen configuration privilege, the agent can configure first screens for all agents.
Change own contact bar	If you select the Change own contact bar privilege, the agent can change his own contact bar.
Contact bar configuration	If you select the Contact bar configuration privilege, the agent can configure the contact bar for all agents.
Show quick bar	If you select the Show quick bar privilege, the quick bar is displayed.
Select own quick bar	If you select the Select own quick bar privilege, the agent can select a file for the quick bar. For further information see Manual User Interface.
Cockpit bar	
Show cockpit bar	If you select the Show cockpit bar privilege, the agents can see the cockpit bar.
Change own cockpit bar	If you select the Change own cockpit bar privilege, the agent can change his own cockpit bar.
Cockpit bar configuration	If you select the Cockpit bar configuration privilege, the agent can configure the cockpit bar for all agents.
Status bar	

Privilege	Meaning
Change own status bar	If you select the Change own status bar privilege, the agent can change his own status bar.
Status bar configuration	If you select the Status bar configuration privilege, the agent can configure the status bar for all agents.

Privilege	Meaning
UI config	
UI configuration	If you select the UI configuration privilege, the agent can configure his own UI. The UI Config module appears in the task bar and can be used.
Change default settings	If you select the Default interface privilege, the agents see the default interface.
UI Config. Application	With the UI Config. Application , privilege the agent can select an active view. After starting the application Contact Center User Interface , the selected view starts automatically, for example, Monitoring. In the UI configuration of a system, profile or agent, the Application tab also appears with the privilege. You can select the active view in the Application tab.
Grid color configuration	Agents can configure background and text colors.

Privileges: UMR

The following privileges are required for **UMR**. Note that these privileges determine whether or not you can use individual functions.

Privilege	Meaning
UMR administrator	If you possess this privilege, you can use the following functions: Email configuration Address book administration The relevant icons will appear under Administration in the task bar.
Keyword based E-Mail routing	If you have this privilege, then you can configure scripts for e-mail with text search keywords. The privilege UMR administrator includes the privilege Keyword bases E-mail routing.
Textblock administrator	If you possess this privilege, you can use the Text block administration module. For details of how to perform this role, see the relevant topics in the online help or the manual.

Privilege	Meaning
UMR supervisor	<p>If you possess this privilege you can work as a supervisor. As a supervisor you can use the following functions.</p> <p>In the Overview folder</p> <ul style="list-style-type: none"> - Delete document - Delegate document to agents - Delegate document to topics <p>In the Deleted folder</p> <ul style="list-style-type: none"> - Delegate document to topic <p>Dictionary</p> <ul style="list-style-type: none"> - Manage - Import
Use textblocks	<p>If you have this privilege, you can use text blocks in documents. The text blocks are set up using the Text block administration module.</p>
Defer e-mails	<p>If you possess this privilege you can put documents on hold. These documents will then be placed in the Held folder.</p>
Print e-mails	<p>If you possess this privilege you can print documents.</p>
Agent queue view	<p>This privilege gives the agent an overview of the email queue for his authorized topics. The agent can select emails from this queue.</p>
Delete e-mails	<p>With this privilege, agents can delete active emails. Once deleted, these emails cannot be retrieved.</p>
Automatic sign on	<p>With this privilege, you are automatically logged into the agent group configured for you.</p>
Advanced archive view	<p>With this privilege, agents can display mailboxes of deleted agents or topics in the Archive folder.</p>
Reply as agent	<p>With this privilege, an agent can choose whether to reply as a topic or an agent. The corresponding email address is then used as the sender.</p>

Privileges: Configuration

You can set the following privileges for the **Configuration** module.

Privilege	Meaning
Configuration	The agent can start and use the Configuration module.
Topic	The agent can configure topics.
Blocked periods	The agent can configure blocked periods.

Privilege	Meaning
Agent group	The agent can configure agent groups.
Agent	The agent can configure agents.
Edit alias	The agent can edit the alias if the agent can configure agents.
Agent profile	The agent can configure agent profiles.
Team	The agent can configure teams.
Workplace	The agent can configure workplaces.
Skill	The agent can configure skills.
Announcement	The agent can configure announcements.
Announcement script	The agent can configure announcement scripts.
Voice unit	The agent can configure voice units.
Chat script	The agent can configure chat scripts.
Customer recognition	The agent can change and enter data for the customer recognition.
External destinations	The agent can change and enter external destinations.
System	The agent can configure general system settings.
Interface for staff planning	The agent can configure the interface for staff planning.
Configuration report	The agent can create a configuration report.
Shift plan	The agent can configure the shift plan.
Delete statistic data	The agent can delete the statistic data.

Service privilege	Meaning
Reporting filters	The agent can configure reporting filters.
Special settings	The agent can configure special settings.
Telephone settings	The agent can configure telephone default settings.
Announcement module	The agent can configure announcement modules.
PBX	The agent can configure PBXs.
Country	The agent can configure country settings.
Queue device	The agent can configure queue devices.
Telephone	The agent can configure telephones.
CHAP server	The agent can configure CHAP servers.
Access code agents	The agent can configure access codes for agents.
Access code topics	The agent can configure access code topics.
E-mail settings	The agent can configure email settings.
Chat server	The agent can configure the settings for the chat server.
Chat settings	The agent can configure chat settings.

Privileges: Variables

You determine whether the agent can configure variables for certain objects (configuration). You can further determine whether the agent may change the value or not (Assign values). You can change the value in the Realtime information area of the user interface if you have the necessary privilege.

You can configure variables for the following objects if you have the necessary privileges.

- Global
- Topic
- Agent group
- Agents
- VU script
- External destinations

Privileges: Reporting

The following privileges are needed for the **Reporting** module.

Privilege	Meaning
Team leader	
Reporting	The agent can start and use the Reporting module.
Topic	The agent can create reports on topics.
Agent group	The agent can create reports on agent groups.
Agent	The agent can create reports on agents.
Show alias only	The agent can create reports on agents using aliases.
Team	The agent can create reports on teams.
Telephone	The agent can create reports on workplaces.
Trunk Line	The agent can create reports on lines.
Outbound ACD	The agent can create reports on outgoing ACD connections.
Voice unit	The agent can create reports on voice units.
Skill	The agent can create reports on skills.
System	The agent can create reports on the system.
PBXs	The agent can create reports on PBXs.
Automatic reporting	The agent can create automatic reports.
Delete data	The agent can delete the reporting data of a certain period.
Set report parameters	The agent can open predefined reports in the Inspector and adjust the report period.
Supervisor	
Definition	The agent can configure the file manager to create new reports, for example.

Privileges: Realtime information

The following privileges are required for the **Realtime information** module.

Agent

Note that you need the necessary license.

Privileges	Meaning
Callback from call list	The agent can use the Callback from call list function.
Switch	The agent can use the Switch function.
Pick up call	The agent can use the pick up call function.
Switch/reserve from queue	The agent can use the Switch/ reserve from queue function. He can accept or switch tasks from the queue or reserve them for himself or other agents.

Team leader

Note that you need the necessary license.

Privileges	Meaning
Realtime information	The agent can start and use the Realtime information module.
Remote functions	The agent can use the remote functions. For information on the available functions, see the user manual or Online Help.
Trunk realtime information	The agent can use the trunk realtime information function.
Out of office notice	The agent can edit the out of office notice of other agents. Note: To use this function the agent needs also the privilege Variable – Agents.
Agent history	The agent can use and edit the agent history.

Supervisor

Note that you need the necessary license.

Privileges	Meaning
Configuration	The agent can use the Configuration function to create or change private or system-wide realtime information.
Supervisor Emergency	The agent can use the Supervisor Emergency function. To be able to configure the function as well, the agent also needs the Configure Supervisor Emergency privilege.
Silent Monitoring	The agent can use the Silent Realtime information or Coaching function in the telephone contact bar.
Supervisor Assistance	The agent can use the Supervisor

Privileges**Meaning**

Assistance and the Silent Monitoring functions.

Privileges: Taskflow Editor

The following privileges are required for the **Taskflow Editor** module.

Privilege	Meaning
Task Flow Editor	The agent can start and use the Taskflow Editor module.
Edit task flow set	This privilege lets you edit a task flow set. If this privilege is not selected you have read-only access.
Activate task flow set	In the case of a system failure the IP Office Contact Center system uses a default task flow set. This default task flow set is protected separately. This privilege lets the agent edit and change the default task flow set.
Use default task flow set	This privilege lets you define a task flow set as the default task flow set.
Edit predefined conditions	With this privilege the agent can edit and change these predefined conditions. A user can edit private conditions without a special privilege.
Advanced mode	<p>The Taskflow Editor has a license called Feat_CC_extUI. This license enables an advanced mode for the Taskflow Editor. You must have this license to use the following elements.</p> <ul style="list-style-type: none">- Logic- Distributor (equal)- Distributor (cyclic) <p>If you do not have the license or the Advanced mode privilege, you cannot open task flow sets with these elements.</p>

Configured privileges: Others

The following privileges are needed for the other modules in the IP Office Contact Center system.

Privilege	Meaning
Dialer	The agent can start and use the Dialer module.
Wallboard	The agent can start and use the Wallboard module.
IVR-Editor	The agent can start and use the IVR-Editor module.
Addressbook Admin	The agent can start and use the Addressbook Admin module.
Task reporting	
Agent evaluation	The agent can use non-call-related agent events.
Contact evaluation	The agent can use Contact evaluation.
Start/stop reports	The agent can start or stop reports.

Configuring agent profiles

What is an agent profile?

An agent profile includes group assignment, authorizations, privileges and telephone. Agent profiles makes it possible to administer these settings comfortably for several agents.

The settings are explained below.

Agent profiles have an inheritance mechanism. You can use this mechanism for the following functions.

- for inheritance
- for assigning the same profile to multiple agents
- as a tool

Using inheritance

If you assign a profile to several agents and change the settings of this profile, the agents' settings are automatically changed as well.

Assigning the same profile to several agents

You can conveniently create a number of agents with the same settings. You do not have to configure the settings for each agent individually.

Using profiles as tools

Even if each agent uses different settings you can use profiles as templates to configure common settings, e.g. keys. Assign the profile to the agent first. All settings of the profile are copied. Then select <None> as predefined profile. The profile settings are kept. You only have to make the differing settings. It does not affect the new customized settings if the original profile is changed later.

What does the Agent profile tab show?

The **Agent profile** tab lists all configured agent profiles. The following information is listed.

Header	Explanation
Name	Shows the name of the agent profile.
Tel	Shows whether an agent profile is configured for the task type Telephony.
Email	Shows whether an agent profile is configured for the task type Email.
PBX	Shows the PBX of the agent profile.

How many agent profiles can you configure?

You can configure any number of agent profiles. Please pay attention to the size of the database.

When is it not possible to delete a profile?

Please note that you cannot delete an agent profile as long as one or several agents are using this profile.

Which actions can you execute with the Agent profile tab?

You can execute the following actions with the **Agent profile** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected agent profile. You can edit the properties.
Create	Creates a new agent profile.
Copy	Copies the selected agent profile. The following settings will be copied. <ul style="list-style-type: none">• Contact bar• Cockpit bar• Home• First screen• Status bar• Application• Realtime information
Delete	Deletes the selected agent profile.

Update in the UI configuration

If you work in the user interface with the module **UI configuration**, then changes of the profiles (new profile, deleted profile) are not immediately visible. You need to update the view (Right click - Update).

Editing an agent profile: General tab

You determine the general settings of an agent profile with the General tab.

Name

Shows the name of the agent profile. Give the agent profile a name. This name must be unique system-wide.

You can use 29 alphanumeric characters maximum.

Task types

You can configure an agent for the following task types. A new tab opens for each task type. You have to enter the respective settings.

- Telephony
- Email
- Chat

Used for

Shows the agents using the profile.

Privileges

Shows the privileges of the agent profile.

Authorization

Shows the authorizations of the agent profile. You determine which topics, agent groups, agents, teams and workplaces the agent profile can use.

Topic

You determine which topics the agent can use.

AG

You determine which agent groups the agent can use.

With the AG (agent group) authorization it is determined for which agent groups an agent can process tasks if he has the **Select AG** privilege.

For agents with privileges like Realtime information, Reporting or Agent group configuration, AG authorization determines for which agent groups they can execute these functions.

Agent

You set which agents the agent can configure.

The agent needs to have the Agent configuration privilege.

Team

You set which teams the agent can configure.

Telephone

You set which workplaces the agent can use.

Telephone group

You set which telephone group the agent can use.

Campaign

You set which campaign the agent can edit and view in the module dialer.

Editing an agent profile: Telephony tab

You can configure the respective properties if you enable an agent profile for the task type Telephony.

PBX

Shows the PBX. If several PBXs are configured you need to select a PBX when you create the task type Telephony.

Group assignment

Shows the agent groups the agent is assigned to for the task type Telephony. A priority between 1 (highest) and 5 (lowest) can be defined for each agent group.

You can insert or delete agent groups and change the order with the **Up** and **Down** buttons.

Settings

Shows the telephone settings. If you deselect Use default settings, you can change the settings.

See also: [Telephone default settings](#)

Editing an agent profile: Email tab

You can configure the respective properties if you enable an agent profile for the task type Email.

Group assignment

Shows the agent groups the agent is assigned to for the task type Email. A priority between 1 (highest) and 5 (lowest) can be defined for each agent group.

You can insert or delete agent groups and change the order with the **Up** and **Down** buttons.

Editing an agent profile: Chat tab

You can configure the respective properties if you enable an agent for the task type Chat.

Settings

You have to configure the following settings.

TaskServer

Select a chat taskserver. If a chat taskserver is configured, then it is automatically used. A chat taskserver can manage one chat server.

Announcement text

Enter an announcement text.

Group assignment

Shows the agent groups the agent is assigned to for the task type Chat. A priority between 1 (highest) and 5 (lowest) can be defined for each agent group.

You can insert or delete agent groups and change the order with the **Up** and **Down** buttons.

Configuring teams

What is a team?

A team usually consists of several agents. You can use the **Realtime information** module to monitor teams and use the **Reporting** module to evaluate them. You can also use teams to subdivide large agent groups for realtime information and reporting purposes.

You can add or remove selected agents. You can also execute these functions by double-clicking an agent.

What does the Team tab show?

The **Team** tab lists all configured teams. The list shows the following information.

Header	Explanation
Name	Shows the name of the team.

How many teams can you configure?

You can configure any number of teams. Please pay attention to the size of the database.

How many members can a team have?

A team can have any number of members. Please pay attention to the size of the database.

Which actions can you execute with the Team tab?

You can execute the following actions with the **Team** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected team. You can edit the properties.
Create	Creates a new team.
Copy	Copies the selected team.
Delete	Deletes the selected team.

Editing a team: General tab

You determine the general settings of a team with the General tab.

Name

Shows the name of the team. Enter a name for the team.

You can use 29 alphanumeric characters maximum.

No brackets () [] { }

Please note that you must not use any brackets for the name of an object.

No characters @ " ' % ! \ < > | / ? =

Please note that you must not use these characters for the name of an object.

Team members

Shows the team members.

Other agents

Shows the agents who are not members of the team.

Editing a team: Telephony, Email, Chat tab

You can configure the respective properties if you enable a team for the task types Telephony or Email or Chat.

Realtime information settings

Shows the realtime information settings. You can use the defaults or change the values.

Wait time threshold for TSF

Enter the wait time in hours and minutes (hh:mm) after which a call or email or chat request is counted as having waited in the queue for too long. Every call or email or chat request that has to wait for more than the duration set reduces the TSF. This setting is also valid for reporting.

The queue of the task type Email is the topic mailbox.

Calculating period of time

Shows the calculated period of time. You can change this value with the Realtime information default values.

Configuring announcements

What is an announcement?

An announcement text is playable text or music. The announcement text can be a wav file. The wav file is stored in the database.

What does the Announcement tab show?

The **Announcement** tab lists all configured announcements. The list shows the following information.

Header	Explanation
Name	Shows the name of the announcement.
PBX	Shows the PBX in which the announcement is configured.
Status	Shows the status of the announcement.
No.	Shows the number of the announcement.
Enable	Shows whether the announcement is enabled for a certain topic or for all topics.
Interr.	Shows whether the announcement is interruptible or not.
Duration	Shows the duration of the announcement.

Which actions can you execute with the Announcement tab?

You can execute the following actions with the **Announcement** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected announcement. You can edit the properties.
Create	Creates a new announcement text. You can configure the properties.
Delete	Deletes the selected announcement text.

Editing an announcement

You can edit the announcement texts of an announcement.

How many announcement texts can you configure?

You can configure up to 500 announcement texts.

Creating or changing an announcement text

You can create or change an announcement text.

The following table lists the settings and provides explanations.

Setting	Explanation
Name	Shows the name of the announcement text. Enter a name for a new announcement text or change the name of an existing text. If a text with the same name already exists, the old announcement text is overwritten. You can use 29 alphanumeric characters maximum.
Text number	Shows the sequential number of this announcement text.
Sound file	Shows a sound file. You can use an existing sound file. You can only use wav files.
Duration	Shows the length of the announcement text in mm:ss (minutes:seconds).
Interruptible	Activate this checkbox if you want the announcement text to be interruptible, e.g. if an agent becomes available during the announcement or music.
Comment	Specifies a comment. You can enter a description for the announcement text file.
Status	Shows the state of the announcement text. The following states are possible. Not transferred. No WAV file was transferred for this text number. Transfer interrupted Interr. The transfer of the WAV file was interrupted. Transferred Transfer completed without errors. Newly transferred. An old WAV file was replaced by a new WAV file.

Supported WAV format

We recommend the following WAV format.

PCM 8,000 kHz, 16 bit, Mono

PBX: Announcement

Shows the PBX. If several PBXs are configured you need to select a PBX when you create an announcement.

Configuring announcement scripts

What is an announcement script?

To be able to use announcement texts in the **Taskflow Editor**, you have to create announcement scripts. The **Taskflow Editor** can then use these announcement scripts for task flow processing. Please note the difference between announcement scripts and announcement texts.

An announcement script can consist of several announcement texts.

What are announcement texts?

All announcement texts in the list are played to the caller one after the other. After all announcement texts have been played the last text of the chain is repeated until replay is stopped (e.g. the call is connected to a free agent). To change the position of an announcement text in the chain select the text and move the mouse pointer to the new position between two other texts. When the mouse pointer changes to a double arrow press the left mouse button to drop the text to its new position.

What does the Announcement script tab show?

The **Announcement script** tab lists all configured announcement scripts. The list shows the following information.

Header	Explanation
Name	Shows the name of the announcement script.
Welc.	Shows if this script is a welcome announcement.
PBX	Shows the PBX in which the announcement script is configured.

How many announcement scripts can you configure?

You can configure any number of announcement scripts.

Which actions can you execute with the Announcement script tab?

You can execute the following actions with the **Announcement script** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected announcement script. You can edit the properties.
Create	Creates a new announcement script.
Copy	Copies the selected announcement script.
Delete	Deletes the selected announcement script.

Editing an announcement script

You can set the properties of an announcement script. You can further play and add announcement texts and move them up or down in the list.

Name

Shows name of the announcement script. You can use 29 alphanumeric characters maximum.

No brackets () [] { }

Please note that you must not use any brackets for the name of an object.

No characters @ " ' % ! \ < > | / ? =

Please note that you must not use these characters for the name of an object.

Attention when using 1x announcements

If the announcement script is used for a 1x announcement, you can only use 22 alphanumeric characters for the name. If you do not take this into account, the task flow using this 1x announcement script cannot be activated. The reason is that when the announcement script is created, a tag with the name Script_<Name> is automatically created. Tags have a maximum length of 29 characters.

IVR Script

It should be no IVR script with the same name.

Welcome announcement

You can select if the announcement script is a welcome announcement.

If an announcement script is marked as welcome announcement, it is not counted as wait time in reporting.

If an announcement script is not marked as welcome announcement, it is counted as wait time in reporting.

Free of cost

The announcement script is free of cost for the caller (no charge).

At the end of script

You can choose whether the last text is to be repeated at the end of the script or if the announcement is to be stopped.

Repeat last text

After all announcement texts have been played the last text of the chain is repeated until replay is stopped (e.g. the call is connected to a free agent).

Automatic stop

The announcement is stopped after all announcement texts have been played.

Announcement texts

Shows number, name and interruptible.

Interruptible means that the announcement text can be interrupted, e.g. if an agent becomes available during the announcement or music.

Which actions can you execute with the Edit Announcement Script tab?

You can execute the following actions with the **Edit Announcement Script** tab. There is a button for each action.

Action	Explanation
Play	Click the Play button to listen to an announcement text. The announcement text is played on the handset.
Insert	Shows the configured announcement texts with number, name and interruptible. You can select one or several announcement texts.
Delete	Deletes the selected announcement text.
Up	Moves the selected announcement text up.
Down	Moves the selected announcement text down.

Inserting an announcement text

If you click the **Insert** button of the **Edit Announcement Script** dialog, the **Select Announcement Text for Script** dialog opens.

The **Select Announcement Text for Script** dialog shows the configured announcement texts with number, name, interruptible and the PBX.

You can select one or up to 5 announcement texts.

Configuring a 1x announcement

In previous releases announcement scripts did not have an exit connector. In release 4.0 and later, you can configure 1x announcement scripts and use them in task flow sets. A 1x announcement script has an exit connector. You can thus determine an alternative flow with the task flow set.

Until release 4.0 a subscriber heard ringing tone after an announcement script with welcome announcement. You can now prevent this with a 1x announcement script.

You can use 1x announcement scripts in a task flow set. You need to take the following points into account for a 1x announcement.

- You have to select the option **Repeat last text**.
- You have to insert at least two announcement texts. The first announcement text usually contains the text, e.g. a welcome text. This text must not be interruptible. The second announcement text (silence) does not contain text. You can use several announcement texts but the last text (silence) must not contain text.
- Only the last text (silence) must be interruptible. Select the **Interruptible** option.
- You can use 22 alphanumeric characters maximum for the name of a 1x announcement script. If you do not take this into account, the task flow using this 1x announcement script cannot be activated. The reason is that when the announcement script is created, a tag with the name Script_<Name> is automatically created. Tags have a maximum length of 29 characters.

Configuring voice units

What is a voice unit?

A voice unit adds features like announcements, speech recognition, and interaction with the caller via DTMF to the functional range of the **IP Office Contact Center** system. DTMF stands for Dual Tone Multi Frequency Dialing.

A voice unit is installed on a PC with hardware and software. The PBX is connected with the voice unit via a line (e.g. S2M with 30 B-channels).

The voice unit creates scripts for the unit with the corresponding software. The VU process offers access to these scripts. This process runs on the IP Office Contact Center server. The scripts can be used in task flow processing.

What does the Voice unit tab show?

The **Voice unit** tab lists all configured voice units. The list shows the following information.

Header	Explanation
Name	Shows the name of the voice unit.
PBX	Shows the PBX in which the voice unit is configured.

How many voice units can you configure?

You can configure any number of voice units.

Which actions can you execute with the Voice unit tab?

You can execute the following actions with the **Voice unit** tab. There is a button for each action.

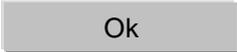
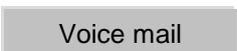
Action	Explanation
Editing	Opens the selected voice unit. You can edit the properties.
Create	Creates a new voice unit.
Copy	Copies the selected voice unit.
Delete	Deletes the selected voice unit.

Editing a voice unit

You can configure the properties of a voice unit.

Properties of a voice unit

You configure the following properties for a voice unit in a **IP Office Contact Center** system.

Settings	Explanation
Name	Specifies the name of the voice unit. You can use 29 alphanumeric characters maximum.
PBX 	Shows the PBX. If you have configured a voice unit, you cannot change this setting.
Type 	You can select Voice Control or <External> as the type.
Version 	Specifies the version of the interface protocol. For Voice Control, enter 1.070.
Host	Shows the host name of the voice unit. You can also use the IP address.
Mail server	Specifies the host name of an SMTP-capable mail server. This mail server is used by Voice Control to send emails.
Standard script 	Shows the standard script. If an error occurs, it is started by Voice Control .
	Confirms your entries and closes the dialog.
	Closes the dialog without applying the changes.
	Opens the VU scripts dialog. The dialog shows the configured VU scripts.
	Opens the Voice mails dialog. The dialog shows the configured voice mails.
	Inserts a line (telephone number of the channels).
	Replaces a line.
	Deletes a line.
	Moves the selected line up in the sequence.
	Moves the selected line down in the sequence.

PBX-specific settings that must be entered

The following lists indicate the settings you must enter based on the PBX you are using.

IP Office Contact Center and Voice Control

- Name
- PBX
- Host
- Mail server
- Default script
- Scripts
- Voice mails

Line allocation

Shows the line allocation of the voice unit.

The list shows the following information.

- Line
- B-channels
- Port

You can add, replace, delete, or move the line up and down the list.

Scripts

The following information is provided.

- Name
- Type
- Welc.
- Accessible

Editing the properties of a VU script

If you select a VU script in the **Voice Unit Scripts** dialog and click the **Properties** button, the **Voice Unit Script - Name of voice unit script** dialog opens.

Properties

You can view the following properties. Use the IVR Editor module to define the settings for an IVR script. Announcement is the default type.

If you are using a version 1.060 voice unit or earlier, you can also edit the properties.

Type

- Undefined
- Announcement
- Welcome announcement
- Automatic agent

Accessible

- Yes
- No

Variables

Shows the defined variables.

1x announcement

You can use the VU script (1x announcement) element in the task flow set.

Voice mails

Shows the current voice mails of the selected voice unit.

The list shows the following information.

- Date / Time
- Done
- Type
- Name
- Customer
- Length
- Topic

You can delete a voice mail.

Click on **Details**, to display any tags stored for the voice mail.

Configuring customer recognition

What is a customer?

Customer recognition provides agents with preliminary information regarding the calling party.

How is a customer identified?

A customer's numbers or email addresses are used for identification. After the identification the database is searched for customer information and the information is offered to the agent.

What does the Customer tab show?

You can choose normal or extended view for the table. You can sort the list by clicking the headers.

View: normal

The **Customer** tab lists all configured customers. The list shows the following information.

Header	Explanation
Name	Shows the customer's name.
Customer number	Shows the customer's number.
Prio	Shows the customer's priority.
Company entry	Shows whether there is a company entry for the customer.

View: extended

The **Customer** tab lists all configured customers. The list shows the following information.

Header	Explanation
Name	Shows the customer's name.
Number/email	Shows the customer's number or email address.
Type	Shows the type.
Type	Shows the kind of number or email.
Prio	Shows the customer's priority.
Company entry	Shows whether there is a company entry for the customer.
Customer number	Shows the customer's number.

How many customers can you configure?

You can configure any number of customers. Please pay attention to the size of the database.

Which actions can you execute with the Customer tab?

You can execute the following actions with the **Customer** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected customer. You can edit the properties.
Create	Creates a new customer.
Delete	Deletes the selected customer.
Man Import	Imports customer data.
Auto Import	Imports customer data automatically in certain cycles.

Editing a customer

You can set the properties for a customer.

Name

Shows the customer's name. You can use 40 alphanumeric characters maximum.

Customer no.

Shows the customer number. You can use 29 alphanumeric characters maximum.

Prio

Shows the customer's priority. The priority is appended to the message (call or email). You can evaluate this priority with in task flow processing (routing) and route the call accordingly. You can e.g. assign a higher priority to more important customers.

Company entry

Determines how a customer is recognized if the configured numbers or email addresses are used.

Valid for the type Telephony

You can e.g. enter a company number for a company (e.g. 0071113586) and in addition enter individual employees with their full numbers (007111358612). If a full number is entered this customer is displayed even if the company number is recognized.

Selected

Recognizes a customer by the company number. If the number matches the beginning of a company number the respective company is displayed as customer.

Not selected

Recognizes a customer by his full number.

Valid for the type Email

You can e.g. enter a company email address (e.g. comergo.com) and in addition enter individual employees with their full email addresses e.g. (heinz.schmidt@comergo.com). If a full email address is entered this customer is displayed even if the company email address is recognized.

The characters after the @ are usually used for a company email address.

Selected

Recognizes a customer by the company email address. If the email address matches the company email address the respective company is displayed as customer.

Not selected

Recognizes a customer by his full email address.

Numbers/emails

A list shows the numbers and emails addresses that can be used to identify a customer. The following information is listed.

- Type
- Category
- Number or email

You can create, edit or delete an entry.

Personal contact/topic

A list shows the personal contacts and topics.

The following information is listed.

- Name (of agents or topics)
- Telephone number
- Email
- Dialed topic

You can insert or delete personal contacts (agents) or personal topics.

Creating or changing a customer number or email

A customer number can have 128 digits maximum.

You can select type and kind of number.

You can select one of the following types.

- Telephone
- Fax
- Email

You can select one of the following kinds.

- Office
- Mobile
- Private

Inserting an agent as personal contact

If you click the **Insert agents** button in the **Customer-Edit** dialog, the **Select personal contact for customer** dialog opens.

A list shows the agents with name, task type, number and PBX.

If you select a PBX and task type the list shows only matching entries.

Inserting a topic as personal topic

If you click the **Insert topics** button in the **Customer-Edit** dialog, the **Select personal topic for customer** dialog opens.

A list shows the topics with name, task type, number and PBX.

If you select a PBX and task type the list shows only matching entries.

Dialed topic

In the **Edit customer** dialog, if you select a contact and click **Dialed topic**, the **Assign topic** dialog opens

A list shows the topics with name, task type, number and PBX.

If you select a PBX and task type the list shows only matching entries.

Importing customers

You can import customer data.. You need two files for the import. One file (import file) contains the data records. The other file (control file) is used to control the import.

You can select whether the imported data is to replace the existing customer data or whether it is added to the existing data.

Which prerequisites must be met?

The following prerequisites must be met if you want to import customers.

- The name of the import file must be the same as the name of the control file. The only difference is the file extension.
- Both files must be in the same folder.

Restriction

You can only import agents.

What does an import file look like?

The import file contains the data records.

The data of a record is separated with semicolons (;).

You must not use any other characters (e.g. ").

The file extension is csv.

What does a control file look like?

The control file contains the entries necessary for controlling the import.

The entries of the control file must match the entries of the import file.

The file extension is txt.

Permitted settings for the control file

The following settings may be used for a control file. You cannot use other settings. The entry is case-sensitive.

Settings	Default	Must use setting	Max. record length	Comment
NOP	-	-	Any	NOP signifies that this column of the record is not imported.
Name	-	Yes	19	Name of customer
Prio	1	No	1	Priority
IsCompany	1	No	1	Specifies if the entry is a company address.
CustomerNo	-	No	19	Customer number
AgentNumber	-	No	29	Agent's number
Agent	-	No	29	Agent's name. You can import several personal contacts (agents).
TopicNumber	-	No	29	Number of a topic
Topic	-	No	29	Name of a topic
BusinessPhone	-	Yes	128	Customer's business number
BusinessEmail	-	No	128	Customer's business email address
BusinessFax	-	No	128	Customer's business fax number
PrivatePhone	-	No	128	Customer's home number
PrivateEmail	-	No	128	Customer's home email address
PrivateFax	-	No	128	Customer's home fax number
MobilePhone	-	No	128	Customer's mobile number
MobileEmail	-	No	128	Customer's mobile email address
MobileFax	-	No	128	Customer's mobile fax number
PhoneNumber	-	Yes	128	Old setting for BusinessPhone

You have to enter 0 or 1 for the entries Prio and IsBusiness. If you do not enter values, 1 is set for Prio and IsBusiness (selected). Fields that are not configured are left empty. Make sure that the name of the agent used as personal contact is the same name used by the IP Office Contact Center system. If this is not the case the personal contact is not imported.

Examples for data and control files

The following texts are examples for an import and the corresponding control file. In the example, only the data Name, CustomerNo and personal contact (Agent) are imported from the import file.

File name of the import file: Example.csv

Import GmbH;Stuttgart;0815;0711/4722;imports all;Agent_5

Export GmbH;Munich;0207;089/4712;exports all;Agent_3

Polzer Peter;Frankfurt;0816;069/4713;Developer;Agent1

File name of the control file: Example.txt

Name

NOP

CustomerNo

BusinessPhone

NOP

Agent

Importing customer data automatically

You can import customer data automatically. The **Configuration** module imports the customer data automatically at set intervals.

Prerequisites

The following prerequisites must be met if you want to import customers.

- The name of the import file must be the same as the name of the control file. The only difference is the file extension.
- Both files must be in the same folder.

What can you configure?

You can configure the following settings for automatic import.

Setting	Explanation
Automatism enabled	Check this box to enable the automatic import of customer data.
Import file	Select an import file.
Ignore import errors	If you check this box the Configuration module ignores errors during import.
Mode	You can select a mode: Replace existing customer data For the automatic import the Configuration module first deletes all existing customer data. The customer data is newly created with the import. Add imported customer data to existing data The existing customer data is updated. If customer data with the same number is imported the existing data is overwritten.
Time	You can select the following intervals for the automatic import. The import starts every day at the time set. The import starts every week at the weekday and time set. The import starts at the time specified. Use the format hh:mm (hours:minutes) for times.

Icon for automatic import

If automatic import is enabled, a clock icon is displayed at the right of the status bar.



Configuring external destinations

What is an external destination?

Any external number (e.g. a mobile telephone number) or the VDN of another call center can be an external destination.

You use external destinations in the Taskflow Editor.

What does the External destination tab show?

The **External destination** tab lists all configured external destinations. The list shows the following information.

Header	Explanation
Name	Shows the name of the external destination.
Task type	Shows the task type of the external destination.
Number/email	Shows the number or email address of the external destination.

How many external destinations can you configure?

You can configure any number of external destinations.

Which actions can you execute with the External destination tab?

You can execute the following actions with the **External destination** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected external destination. You can edit the properties .
Create	Creates a new external destination.
Copy	Copies the selected external destination.
Delete	Deletes the selected external destination.

Properties of an external destination

You can configure the properties of an external destination.

You can set up an external destination to be able to forward a message as an SMS or fax or print the message on a network printer.

Properties

You must define the following properties for external destinations.

Property	Explanation
Name	<p>Shows the name of an external destination. You can use 29 alphanumeric characters maximum.</p> <p>No brackets () [] { }</p> <p>Please note that you must not use any brackets for the name of an object.</p> <p>No characters @ " ' % ! \ < > / ? =</p> <p>Please note that you must not use these characters for the name of an object.</p>
Task type	<p>Shows the task type of an external destination.</p> <p>You have to enter the number and the delay time if destination is busy for the task type Telephony.</p> <p>You have to enter the email address for the task type Email.</p>
Telephone number	<p>Shows the number of the external destination. You can use 25 digits maximum. You have to take the access code into account for external destinations.</p>
Task type:  Telephony	<p>The number is obligatory for the task type Telephony.</p>
Email	<p>Shows the email address of the external destination. You can use up to 25 characters.</p>
Task type:  Email	<p>The email address is obligatory for the task type Email.</p> <p>You can define an external destination as an SMS, fax or network printer. In the Email field, use the following entries.</p> <p>Email address EMAIL=<email address></p> <p>SMS=<telephone number></p> <p>FAX=<telephone number></p> <p>PRINT=<UNC path to the network printer></p>
Delay time if destination is busy	<p>You can only enter the delay time if dest. busy for the task type Telephony.</p> <p>Shows the delay time in minutes and seconds. The minimum delay time is one second, the maximum delay time 1 hour.</p> <p>The delay time defines for how long the external destination is blocked for task flow processing. Please note that the delay time is not equivalent with automatic redialing.</p>
Variables	<p>Shows the defined variables.</p>

How does the delay time work?

A delay time of 1 minute is set for an external destination. Task flow processing tries to route to this external destination. The external destination is busy. It is now blocked for task flow processing for 1 minute. During this time (delay time) the task flow processing does not try to reach the destination. After the delay time, 1 minute in this example, task flow processing tries to reach the destination again.

Configuring voice recording with Voicemail Pro

You can configure voice recording to occur automatically or on demand

Configuring automatic voice recording

Automatic voice recording occurs when an agent connects to an incoming call with the topic variable VMProRec assigned.

Announcements and queries with voice control scripts are not recorded. Calls of less than three seconds duration are not recorded. Voice recording ends when the agent transfers the call or when the agent or caller ends the call.

Voice recording is paused for consultation call and resumes when the consultation call ends. Voice recording is paused for calls on hold.

Procedure

1. Configure a voice recording tag. Select **Administration > Configuration > Tag list > Create**.
2. In the Tag - Create window, in the **Name** field, enter **VMProRec**.
3. In the **Data Type** field, select **Number**.
4. In the **Resolution** field, select **Integer**.
5. Assign the tag as a topic variable. Select **Administration > Configuration > Topic > <topic_name> > Variables > Add > Select Tag**.
6. In the Select Tag window, select the **VMProRec** tag and then select the value. The value options are:
 - 0: Tag is not applied to the topic and no automatic recording occurs.
 - 1: Call is recorded when agent connects and the Recording Type is VRL.

- 2: Call is recorded when agent connects and the Recording Type is VRLA.
- <xxxx>: Call is recorded when agent connects and the Recording Type is any valid IP Office Mailbox number.

Configuring on demand voice recording

When on demand voice recording is configured, an agent can select the recording button to initiate voice recording. The call can be incoming or outgoing and can be a distributed call or a direct call. If an announcement is configured in Voicemail Pro, recording starts after the announcement.

The recording button light is green when voice recording is active. The agent can toggle voice recording on and off. Each time voice recording is initiated, a new file is created.

Announcements and queries with voice control scripts are not recorded. Calls of less than three seconds duration are not recorded. Voice recording ends when the agent transfers the call or when the agent or caller ends the call.

Voice recording is paused for consultation call and resumes when the consultation call ends. Voice recording is paused for calls on hold.

Procedure

1. Configure an External Destination. Select **Administration > Configuration > External Destination**.
2. In the External Destination - Edit window, enter the external destination **Name**.
The **Name** must begin with VMProRec. You can configure as many external destinations as required for different recording types and destinations. For each external destination, append the number to the name. For example, **VMProRec3100**.
3. Enter a value in the **Number** field. The options are:
 - 0: Tag is not applied to the topic and no automatic recording occurs.
 - 1: Call is recorded when agent connects and the Recording Type is VRL.
 - 2: Call is recorded when agent connects and the Recording Type is VRLA.
 - <xxxx>: Call is recorded when agent connects and the Recording Type is any valid IP Office Mailbox number.
4. Assign the external destination to the recording button. Select **Administration > UI config > Agent > <agent> > Contact bar**.
5. In the Configuration Contact Bar window, if the **Default** check box is checked, uncheck it.
6. In the **Available elements** list, select the **Recording** element and click **Add** to move it to the **Selected elements** list.
7. In the **call recording on: (element: recording)** field, click the selection button.
8. In the Choose external destination window, select the external destination.
9. Click **OK**.
10. Close the Configuration Contact Bar window.

Configuring workplaces

What is a workplace?

A workplace lets you assign a PC and telephone to a specific workstation.

When an agent logs in on the IP Office Contact Center system with a PC and **Outlook**, the PC is automatically listed in the list of workplaces. The host name of the PC is used as name. You can change the name and assign a telephone to the workplace.

What does the Workplace tab show?

The **Workplace** tab lists all configured workplaces. The list shows the following information.

Header	Explanation
Name	Shows the name of the workplace.
Terminal workplace	Shows the name of the terminal workplace.
Type	Shows the type of terminal workplace. PC for personal computer. NC for network computer.
Telephone	Shows the number of the telephone.
PBX	Shows the PBX the telephone is connected to.

How many workplaces can you configure?

You can configure any number of workplaces.

Which actions can you execute with the Workplace tab?

You can execute the following functions with the **Workplace** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected workplace. You can edit the properties.
Create	Creates a new workplace.
Copy	Copies the selected workplace.
Delete	Deletes the selected workplace.

Editing a workplace

You can configure the properties of a workplace.

You can configure a terminal workplace and telephone for a workplace.

Workplace name and info

You can enter a name and info for a workplace.

The name must be unique in the IP Office Contact Center system. You can use 256 alphanumeric characters maximum.

In addition to the name of a workplace you can enter information. You can use 256 alphanumeric characters maximum.

Terminal workplace

You can enter the following information for a terminal .

Information	Meaning
Type	Specifies the type of terminal workplace. You can select PC or NC. PC for personal computer. NC for network computer.
Type: PC Host name	If you select PC, specify the host name of the terminal workplace.
Type: NC NC name	If you select NC, specify the network computer name of the terminal workplace. You must enter the network computer name in all capital letters.
About	Shows information on the terminal workplace. You can use 256 alphanumeric characters maximum.

Telephone

If you configure a telephone as a workplace you must enter the number and select a PBX.

Telephone messaging

By default, IP Office Contact Center message feedback on the phone is switched off. It can be switched on by setting a configuration variable on the pbx. The variable must be created from TaskTag in configuration. The name of the TaskTag must be "IPOSendPhoneMsg". Type is a string. Once the TaskTag is created, it can be assigned to the PBX and the value can be set.

When the value is set to "on" IP Office Contact Center phone messaging is activated. When the value is set to "off" or variable is not set, phone messaging is not activated.

Note that the set value for the "IPOSendPhoneMsg" tasktag is case sensitive. Only lower case "on" or "off" is accepted.

How do you set up an agent on a terminal server?

To set up an agent on a terminal server, follow these instructions.

Installing on a terminal server

You must install the user interface as an RPC connection on the terminal server.

An agent on a PC starts a terminal server session on a terminal server. A telephone is assigned to the agent.

Setting up a workplace on a terminal server

To set up a workplace as a terminal server, follow these steps.

1. Click the **Workplace** tab.
2. Click **Create**. The **Workplace Configuration - Create** dialog opens.
3. Enter a name. You can enter information as an option.
4. Select **Terminal workplace**.
5. Select **NC**.
6. Enter the NC name in all caps. You can enter information as an option.
7. Select a telephone.
8. Click **OK** to save your settings. The workplace is set up and appears in the list.

Signing on

Note that each remote client is signed on with its own separate account. If this is not the case, the different client sessions and accounts logged on to the terminal server can influence each other.

Effect 1:

testuser is signed on to the terminal server. testuser is also signed on to the remote client. If the user interface is started on the remote client, it also starts on the terminal server.

Effect 2:

If the same remote account is signed on to multiple terminal sessions, starting the user interface on one terminal client also starts the client on all corresponding terminal sessions.

Note for trace system

If you use the trace system (TTrace), you can use the following function.

1. You have activated the **ReportRPCFunction** reporter category in the kernel.
2. A remote client name is displayed in the trace system output.

Configuring pause codes

What is a pause code?

You specify the kind of break with a pause code.

What does the Pause code tab show?

The **Pause code** tab lists all configured pause codes. The list shows the following information.

Header	Explanation
Name	Shows the name of the pause code.

How many pause codes can you configure?

You can configure any number of pause codes.

Which actions can you execute with the Pause code tab?

You can execute the following actions with the **Pause code** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected pause code. You can edit the properties.
Create	Creates a new pause code.
Delete	Deletes the selected pause code.

Editing a pause code

You edit the properties of a pause code with the **Pause Code** dialog.

Pause code

Shows the name of the pause code. You can use 254 alphanumeric characters maximum.

Configuring PBXs

What is a PBX?

PBX stands for private branch exchange.

What does the PBX tab show?

The **PBX** tab lists all configured PBXs. The list shows the following information.

Header	Explanation
Name	Shows the name of the PBX .
Abbreviation	Shows the abbreviation of the PBX .
Location	Shows the location of the PBX .
Type	Shows the type of PBX.
Version	Shows the version of the PBX.

How many PBXs can you configure?

You can configure any number of **PBXs**.

Which actions can you execute with the PBX tab?

You can execute the following actions with the **PBX** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected PBX . You can edit the properties.
Create	Creates a new PBX .
Delete	Deletes the selected PBX . If you delete a PBX, all assigned agents, topics, agent groups, voice units, announcements, announcement scripts, telephones and queue devices are also deleted.

Editing a PBX

You can configure PBX properties, accesses and connections. You can view the PBX settings.

Editing a PBX configuration

You can configure the following properties of a PBX.

General fields

You enter the following settings as general settings for a PBX.

Setting	Explanation
Name	Shows the name of the PBX. This name must be unique within the IP Office Contact Center system.
Abbreviation	Shows the abbreviation of the PBX . This setting is optional.
Location	Shows the location of the PBX . This specification is optional.
Color	Shows the color of the PBX. The PBX is displayed with this color by the modules of the IP Office Contact Center system.
Type	Shows the type of PBX.
Version	Shows the software version of the PBX. The <i>kernel</i> process needs this information.
User name	IP Office
Password	Not required.

List

The PBX connections are listed. You have to enter the corresponding properties for more than one PBX.

Assign to IP Office Contact Center

Selecting this option activates the input boxes for IP Office Contact Center.

Setting	Explanation
Access code for dialer	<p>Shows the access code for external connections for Preview, Direct and Agent dialers.</p> <p>The external line code is a special code used within PBXs for seizing external lines and for numbers of dialer campaigns. If this code is prefixed it allows the seizure of specific lines.</p> <p>The numbers of campaigns do not have to be adjusted.</p> <p>Additional note</p> <p>For the dial parameters of a campaign or topic the option Mark call as ACD call <u>must not</u> be selected or the external line code is not used.</p>
Access code for external OutCC	Shows the access code for external callback.
Access code for internal OutCC	Shows the access code for internal callback.
Access code	<p>You must enter an access code for Preview, Direct and Agent dialers. You can configure any number of access codes.</p> <p>You can insert, change or delete access codes for preview, direct and agent dialers.</p>
Access code for address book server	Shows the access code for address book server. The address book is used by agents as telephone book function.

Settings

The settings of the configured PBX are listed.

The list shows the following information with description, minimum and maximum values.

- Number of AGs per agent
- Number of overflow groups
- Length password
- Number of B-channels
- Length topic name
- Length AG name
- Length agent name
- Dealer group
- Urgent info (agent)
- Signaling threshold (agent)
- Announcement text number
- AG position
- AG priority
- Job code length general
- Job code length for topic
- Ring timeout (AG)
- ACW agent
- ACW topic
- Announcement factor (AG)
- Overflow factor (AG)
- Queue factor (AG)
- AG number

External line

The **External line** dialog shows a list of all configured **external lines**.

Which actions can you execute with the External line tab?

You can execute the following actions with the **External line** tab. There is a button for each action.

Action	Explanation
Cancel	Cancels an action.
Create	Creates a new external line .
Delete	Deletes the selected external line.

What does the external line list include?

The list shows the following information.

Header	Explanation
Country setting	Shows the selected country.
Area code	Shows the area code. Example: 07191
PBX number start	Shows the PBX start number. Example: 13586-00
PBX number stop	Shows the PBX stop number. Example: 13586-99
Number of local digits	Shows the number of local digits (digits which already belong to the local call number stock of the PABX domain. Example: PABX number start 1321 to PABX number end 1385 Therefore there are 2 local digits. If you only enter one PABX number start the number of local digits is 0.

Creating an external line

To create an external line, follow these steps.

1. In the **External line** list, view click the **Create** button. The **Country setting** field is set to Germany by default.
2. In the **Area code** field, enter the area code.
3. Fill in the **PBX number start**, **PBX number stop** and **Number of local digits** fields.
4. Click **OK** to confirm your settings.

Deleting an external line

In the **External line** list, select one or more country settings and click the **Delete** button. The selected external lines are deleted following a prompt.

Configuring PBX connections

You have to configure the connections of the PBX. You must configure inbound and outbound connections.

From PBX 1 to PBX 2

Access code

Shows the access code from PBX 1 to PBX 2.

Number

Shows the number of B-channels from PBX 1 to PBX 2.

From PBX 2 to PBX 1

Access code

Shows the access code from PBX 2 to PBX 1.

Number

Shows the number of B-channels from PBX 2 to PBX 1.

Task server

The **Task server** dialog lets you edit and display the general properties of a task server.

Displays

1. To edit the properties of a task server, click **Edit**. The following properties are shown on three tabs.

General tab

Enter the following settings as general settings for a **task server**.

Setting	Explanation
Name	Shows the name of the task server.
Host name	Shows the network computer name of the task server.
Session ID	Shows the session ID of the task server. If multiple task servers are connected to the PBX, the session ID is different. You cannot edit this value.
Start time	Specifies the time when the task server is started. You cannot edit this value.
Version	Shows the current version of the task server. You cannot edit this value.

Properties tab

The **Properties** tab shows following information.

Setting	Explanation
PABXTenant	The PABXTenant is used for the configuration synchronization with the PBX. You can enter multiple tenants. The Tenants are separated by a comma. If you change a tenant, the configuration will be updated.
PbxDriverName	Specifies the name of the PBX task server.
EndPauseAfterLogin	false Default. The pause is not finished after logging. true The pause is terminated after logging.

The **Assignment** tab displays the content of the task server.

Setting	Explanation
Assigned applications	Shows the assigned applications. In general [VEA] VEA must be assigned in the list. You can edit the properties of an assigned application. See also: Editing the properties of an assigned application.
Other applications	Shows the other applications.

Editing the properties of an assigned application [VEA] VEA

You can edit the properties of an assigned application.

General tab

Enter the following settings as general settings for an assigned application.

Setting	Explanation
Name	Shows the name of the application.
Host name	Shows the network computer name of the application. You cannot edit this value.
Session ID	Shows the session ID of the application. You cannot edit this value.
Start time	Specifies the time when the application is started. You cannot edit this value.
Version	Shows the current version of the application. You cannot edit this value.

Properties tab

Enter the following settings as properties for an assigned application.

Setting	Explanation
UseCarrierBasedRouting	The UseCarrierBasedRouting parameter must be set (true) if calls that cannot be routed in the IP Office Contact Center system must be further routed in the intelligent network. If the UseCarrierBasedRouting parameter is not set (false), the caller immediately hears a dial tone. The default setting is false.
DefaultScript	Do not change the setting.
MaxTransferTime	Do not change the setting.
TaskserverActionTimeout	Do not change the setting.
TaskServerRouteResponseTimeout	Do not change the setting.
MaxSpeakTime	Do not change the setting.
MaxCountOfWaitQueueDevices	Shows the percentage of devices available used for queue devices.
MaxCountOfDialingDevices	Shows the percentage of devices available for the dialer used for outbound jobs.
DisconnectSupervisionTimeout	Do not change the setting.
PlayTextSeqRetryTimeout	Do not change the setting.
PlayTextSeqRetryCount	Do not change the setting.

Settings for dialers with IP Office Contact Center

You must set **MaxCountofWaitQueueDevices** and **MaxCountofDialingDevices** for using the Dialer module with IP Office Contact Center.

You can configure the values to total more than 100%. For example, you can set 75% for queue devices and 65% for dialing devices. This enables optimum use of the devices for inbound and outbound calls and jobs. If you have few inbound calls for example, the Dialer module can use more devices for outbound jobs or vice versa if you have more inbound calls.

Do not set **MaxCountofDialingDevices** too high since otherwise there may be no available devices for inbound calls, which are then routed to the queue.

See also: Using the Dialer module with IP Office Contact Center.

PBX access

The **PBX Access** dialog shows a list of connections with the PBX.

You can use several Module Managers on different PCs for accessing a PBX. You have to configure these connections with the PBX accordingly.

Which actions can you execute with the PBX Access dialog?

You can execute the following actions with the **PBX Access** dialog. There is a button for each action.

Action	Explanation
Insert	Creates a new PBX access. You can edit the properties.
Delete	Deletes the selected PBX access.

Editing a PBX access

You have to enter host name, port and B-channels for PBX access.

Setting	Explanation	Explanation
	explanation	L0x
Host name	Shows the name or TCP/IP number of the PC the Module Manager is installed on.	You have to enter the TCP/IP number of the ACB board. The PBX with L0x must be accessible in the network.
Port	Shows the socket port of the respective Module Manager. This is usually socket port 5679.	Shows the socket port for accessing the PBX with L0x. You must enter port 6555.
B-channels	Shows the number of B-channels of the respective Module Manager. One B-channel is usually used. A changed number of B-channels becomes effective only after a reconnect with the PBX (PBX is deactivated and reactivated).	Multiple LAN connections for a multi-module PBX are possible.

Access code

You must enter an access code for Preview, Direct and Agent dialers. You can configure any number of access codes.

You can insert, change or delete access codes for Preview, Direct and Agent dialers.

Conf. access

The dialogue is currently without function.

OSSI stands for Operations Support Systems Interface.

From the CM configuration the agent passwords are read and transferred in the IP Office Contact Center system over a synchronisation.

For the function a user for OSSI with appropriate authorization is needed. You must configure the access to OSSI.

Enter the following settings.

Setting	Explanation
IP address	Specifies the IP address of the CM.
Port	Specifies the port for the connection to OSSI. The default port is 5022.
User	Specifies the OSSI user. You can use 29 alphanumeric characters maximum.
Password	Specifies the password of the user. You can use 29 alphanumeric characters maximum.
2nd password (opt.)	Specifies an optional password. You can use 29 alphanumeric characters maximum.
Pin (opt.)	Specifies an optional PIN. You can use 20 numbers maximum.
Automatic synchronisation	You can select that the data are synchronized automatically. The data are read in the OSSI and transferred to the IP Office Contact Center. In the OSSI no data are changed.
Start time	You can set a time for the automatic synchronisation. Adjustable is 00:00 to 24:00.
Interval	You can enter an interval between 30 minutes and 30 days. If you enter 0, then the synchronisation will be done only once at the start time.

Messages

Messages about the function are shown in the trace outputs of the process config.

Usage

A IP Office Contact Center system can use CM agents.

To use a CM agent in the IP Office Contact Center system, you have to enter the phone number configured in the CM in the IP Office Contact Center telephony configuration. The PBX process task server then uses the corresponding CM-Agent.

Configuration- Agent – tab Telephony - Number

CM agent password

The CM-Agent has for logging on the telephone a CM agent password. The CM agent password can be included in the following ways in the IP Office Contact Center configuration:

- Submit CM Agent password in the application configuration
- Submit CM agent password by the IP Office Contact Center agent in user interface
- Submit CM agent password by the process IP Office Contact Center Config

In all three variants it is important to note that the IP Office Contact Center system does not write data to the CM. The CM agent password is encrypted in the IP Office Contact Center database. The CM-Agent password is used when logging the CM agent on the phone by the IP Office Contact Center UI.

Submit CM Agent password in the application configuration

A IP Office Contact Center administrator can add a current CM-agent password for the agent.

Submit CM agent password by the agent in user interface

The IP Office Contact Center administrator does not know all the CM agent passwords. The IP Office Contact Center agent can enter the CM agent password. If the IP Office Contact Center agent has entered the correct CM-agent password, then the CM Agent are logged on automatically by the IP Office Contact Center-UI.

User Interface - File- Change PBX password

Submit CM agent password by the process IP Office Contact Center Config

The IP Office Contact Center Config process can use the Operations Support System Interface (OSSI) of the CM. The CM-Agent password is read and stored in the IP Office Contact Center database. For this function, the following requirements must be set:

- Access to the OSSI of the CM must be configured in the IP Office Contact CenterUI.
- The used OSSI Users (init) must be authorized to read the CM agent passwords.

If these conditions are met, then the process IP Office Contact Center Config reads for agents who have configured in the tab telephony a CM agent number, the corresponding CM-agent passwords from the CM and enters it in the IP Office Contact Center database.

The adjustment is using the following conditions.

- The OSSI access is configured on the PBX system and activated.
- The OSSI data have the required permission level.
- The process IP Office Contact Center Config is started.

- The IP Office Contact Center-Config process is working and the OSSI password will be changed in the IP Office Contact Center-config UI.
- The IP Office Contact Center-Config process is working and an interval is entered. The interval determines when the data are imported.

Configuring the country setting

What is the country setting?

The country setting lets you enter the name of a network provider, assign it a country and enter the national and international codes. The country setting displays the provider data.

What does the Country setting tab show?

The **Country setting** tab lists all configured **countries**. The list shows the following information.

Header	Explanation
Name	Shows the name of a network provider (such as Deutsche Telecom AG, Arcor).
Country	Shows the country name of the country setting.
Country code	Shows the country code (for example, 49 for Germany, 33 for France, 39 for Italy).
National code	Shows the national code for the country setting (example: 0).
International code	Shows the international code for the country setting (example: 00).
Use area code	Indicates whether the area code for the country setting is also dialed. (For example, in Spain you always dial the area code)

Which actions can you execute with the Country setting tab?

You can execute the following actions with the **Country setting** tab. There is a button for each action.

Action	Explanation
Editing	Opens the selected country setting. You can edit the

Action	Explanation
Create	Creates a new country setting.
Delete	Deletes one or more selected country settings.

Editing the country setting

Double-click the country you want to change or click the **Edit** button to open the **Country setting - Edit** dialog. You can edit the settings.

Creating a country setting

To create a country setting, follow these steps.

2. On the **Country setting** tab, click the **Create** button. The **Create country setting** dialog opens.
3. In the **Name** field, enter a network operator.
4. In the **Country** field, enter a country.
5. Fill in the **Country code** and **Codes** fields and select the **Use area code** checkbox.
6. Click **OK** to confirm your settings.

Deleting a country setting

To delete a country setting, follow these steps. Please note that you cannot undo this action.

7. On the **Country setting** tab, select one or more country settings and click the **Delete** button. You are prompted.
8. Click **Yes**. The selected country settings are deleted.

Configuring queue devices

What is a queue device?

A queue device receives incoming calls until they can be forwarded to an available agent.

What does the Queue device tab show?

The **Queue device** tab shows a list of start and stop numbers **and the associated PBX**. The list shows the following information.

Header	Explanation
Number	Shows the queue device number.
PBX	Shows the PBX for the number.
active	Symbol X indicates that the number has been set up in the CHAP configuration.

Which actions can you execute with the Queue device tab?

You can execute the following actions on the **Queue device** tab. There is a button for each action.

Action	Explanation
Create	Creates a new number block.
Delete	Deletes one or more selected numbers.

Editing queue devices

The Queue device tab displays the assigned numbers and PBX. These numbers are used for the PBX to assign the queue devices.

Creating queue devices

If you use queues, you must configure queue devices. Proceed as follows:

1. On the **Queue device** tab, click the **Create** button.
2. Select a PBX. The **Create queue device** dialog opens.
3. In the **Start no.** field, enter the first number.
4. Click the **Stop no. field**. The number entered in the **Start no.** field is highlighted. Replace this number with the stop number and click **OK**.

Deleting queue devices

To delete a queue device, follow these steps. Please note that you cannot undo this action.

1. On the **Queue device** tab, select one or more numbers and click the **Delete** button. You are prompted.
2. Click **Yes**. The selected numbers are deleted.

Configuring telephones

What is a telephone?

The Telephone tab lets you specify the available agent telephones for the IP Office Contact Center. The ACM PBX and IP Office Contact Center system are not synchronized automatically.

Notice IP Office PBX

For each telephone configured in the IP Office Contact Center system, a AES license VALUE_TSAPI_USERS is allocated.

What does the Telephone tab show?

The **Telephone** tab lists all configured **numbers and PBXs**. The list shows the following information.

Header	Explanation
Subscriber number	Shows the number of the telephone.
PBX	Shows the PBX for the number.
Name	Shows the configured name. The name can be used in the realtime information Telephone status for telephone group (grid).
IP address	Shows the IP address of the telephone.
MAC address	Shows the MAC address of the telephone.
Last contact to push_srv	Shows the time of the last contact to the push server.

Which actions can you execute with the Telephone tab?

You can execute the following actions with the **Telephone** tab. There is a button for each action.

Action	Explanation
Create	Creates a new number block.
Delete	Deletes one or more selected numbers.

Editing telephones

The **Telephone** tab displays the assigned numbers and PBX.

Creating a telephone

To create a telephone, follow these steps.

1. On the **Telephone** tab, click the **Create** button.
2. Select a PBX. The **Create telephone** dialog opens.
3. In the **Start no.** field, enter the first number.
4. Click the **Stop no. field**. The number entered in the **Start no.** field is highlighted. Replace this number with the stop number and click **OK**.

Deleting a telephone

To delete a telephone, follow these steps. Please note that you cannot undo this action.

1. On the **Telephone** tab, select one or more numbers and click the **Delete** button. You are prompted.
2. Click **Yes**. The selected numbers are deleted.

Configuring telephone groups

What is a Telephone group?

You can use a telephone group to get real time information about it.

Conditions

To configure a telephone group you need the following conditions.

- You need the privilege of telephone / telephone group.
- You need the appropriate permissions for the telephones and telephone groups.

What does the telephone group tab show?

The Register-phone group shows the name of the phone-groups.

Name

You can use 29 alphanumeric characters maximum. The name must be unique in the IP Office Contact Center system.

Number of Telephone groups

The number of telephone groups is not limited.

Which actions can you execute with the Telephone group tab?

You can execute the following actions with the **Telephone group** tab.

Action	Explanation
Edit	Opens a selected telephone group. You can edit the properties.
Create	Creates a new telephone group.
Copy	Copy a selected telephone group.
Delete	Deletes a selected telephone group.

Monitoring telephone status

1. You can monitor individual telephone or telephone group status. A telephone group can contain all employees within a single department. Configure the real-time information file.
 - a. Add a monitor Telephone status for the group.
 - b. To call a telephone, you can set the Call with double-click property.
 - c. Save the information file.
2. View the telephone status.

Each telephone in the group appears as a button. The button color indicates the telephone's status. The display shows the telephone number. If an agent is logged in, the tool tip displays the agent's name.
3. Double-click a telephone button to call the agent.

Configuring the CHAP server

What is the CHAP server?

CHAP stands for Common Hardware Abstraction Platform.

What does the CHAP server tab show?

The **CHAP server** tab lists all known CHAP servers and host names. The list shows the following information.

Header	Explanation
Name	Shows the name of the CHAP server.
Host name	Shows the network computer name of the CHAP server.
Session-ID	Shows the session ID of the CHAP server if more than one CHAP server is connected to the PBX. The session ID is always displays and is different for different CHAP servers.
Start time	Specifies the time when the CHAP server is started.
Version	Shows the current version of the CHAP server.

Which actions can you execute with the CHAP server tab?

You can execute the following actions with the **CHAP server** tab.

Action	Explanation
Editing	Opens a selected CHAP server. You can edit the properties.
Insert	Inserts a new CHAP server.
Delete	Deletes a selected CHAP server.

Editing the CHAP server

The **Edit CHAP** dialog lets you configure the CHAP server.

Prerequisite

To edit the CHAP, the VEA and CHAP Sync processes must be running.

Properties Chap adapter line

You must configure the following properties for the Chap adapter line. A plausibility check will be done. You will become a message in case of error.

Pool for topics

All the channels are used for topics. If you set up a channel for a phone number (topic), then the entire pool is used, that means all configured channels for topics are used. For a call number, you must set up at least one channel.

Note that the pool function only applies to topics. The total number of channels is checked by the user interface.

IPO-SIPEXT-IP Settings Explanation

You must configure the following properties for a CHAP adapter line. The settings are checked for plausibility. If an error occurs, you receive a message.

Settings	Explanation
DNSServerIP	DNSServerIP sets the IP address of network domain name server.
FullQualifiedLocalHostName	FullQualifiedLocalHostName sets the full qualified local hostname. Example: ipoccsystem.avaya.com This string is independent to any existing domain. Usually it is the hostname followed by the domain name defined in the IPO.
LocalDomainName	LocalDomainName sets the local unified domain name. It is independent to any existing domain name. It can be a complete new name. It must be the same namedefined in the IPO. This name is used within SIP to identify the chap system as an own pbx. Which name is used is up to the customer and its pbx network. Example: avaya.com
LocalHostName	LocalHostName sets the normal local hostname. Example: ipoccsystem
LocalIPAddress	Specifies the IP address of the server running the CHAP.

Settings	Explanation
LocalRTPPortRange	Specifies the range for the ports used by the CHAP for the RTP connections. Ports 14000 to 15000 are set by default. Note that you need 4 ports per channel. If a port is assigned, the next available port is used.
LocalSignalPort	Specifies the far-end listen port of the associated IPO. The default setting is port 5100.
MaxCallCountPerSecond	MaxCallCountPerSecond specifies the maximum amount of calls per second. All other calls will be crushed.
NetworkQuality	Specifies the network quality in percent. Example: 75 (For details see Network Quality.)
NodeNumberUCIDonMakeCall	NodeNumberUCIDonMakeCall specifies the node number which will be integrated into a CHAP generated UCID. In case of making a complete new call by IP Office Contact Center/CHAP and SuppressUCIDonMakeCall is switched to "false" this number will be part of the first 2 bytes.
PBXDomainName	PBXDomainName this name must be the same name as in the IPO.
PBXIPAddress	Specifies the IP address of the SIP trunk Ethernet connection in the IPO. (For details see PBXIPAddress, PBXSignalPort.)
PBXPingPeriod	Indicates the time in milliseconds between two pings. If you enter 0 then ping is deactivated. Example 3000 (For details see Network Quality.)
PBXSignalPort	Specifies the near-end listen port of the associated signaling group in the IPO. The default setting is port 5100. (For details see PBXIPAddress, PBXSignalPort.)
SRTP	SRTP this value is recommended to set to "true".
SuppressUCIDonMakeCall	SuppressUCIDonMakeCall switches the UCID generator to create UCIDs on make calls by IP Office Contact Center/CHAP
TransportTypeProtocol	TransportTypeProtocol default value is "TLS". No other values are allowed.
Trunk	Trunk default value is "true". No other values are allowed.

PBXIPAddress, PBXSignalPort

Within this entry it is possible to enter more than one IP address / IP port pair.

It is a list which is used to keep working with IP Office Contact Center in case one PBX is down.

Example:

PBXIPAddress 192.168.1.10,192.168.1.20,192.168.1.30

PBXSignalPort 5100,5200,5300

Each IP address corresponds to the IP port at the same position. That means:

Position 1: 192.168.1.10 : 5100

Position 2: 192.168.1.20 : 5200

Position 3: 192.168.1.30 : 5300

The list will be switched from position one to end and continues with one again in case one PBX is not accessible.

This is a list of nonhierarchical PBX accesses.

To use this feature it is necessary to configure in each PBX the same number ranges to guaranty full fallback.

Network quality

Entering PBXPingPeriod determines the network quality and compares it to the target network quality. When the current network quality is less than the target network quality, then the CHAP dismantles the IP line and activates an IP reconnect function. The IP reconnect function tries to reestablish the line. The dismantling of the IP line results in all currently active calls being dismantled in CHAP.

Example:

PBXPingPeriod: 3000

Network Quality: 75

The current network quality is determined over the time period of a minute with all the pings that took place during this period (calculated from the PBXPingPeriod). The number of Pings per minute is taken and set as 100%. In the example this is 20 pings (every 3 seconds). The minimum of the accepted network quality is 75%, which is 15 pings. If less than 15 pings per minute are successful, then the CHAP declares the IP line as severed and dismantles the line and tries to reestablish the IP line.

Deleting CHAP servers

On the **CHAP server** tab, select one or more CHAP servers and click the **Delete** button. The selected CHAP servers are deleted following a prompt.

Ring tone setup for CHAP

You must configure the properties of the ring tone for topic calls that do not have announcements in the call flow. The ring tone must also be connected in CHAP, as this is required by QSIG.

Ring tone properties

You must configure the following settings for the ring tone.

Property	Example	Explanation
Name	RingTone	You must use RingTone.
Frequency	425Hz	Indicates the frequency in Hertz.
Volume	(75%)	Specifies the volume as a percentage of the maximum level.
Duration	960 ms	Indicates the length of the ring tone in milliseconds.
Pause	3840 ms	Indicates the length of the pause following the ring tone in milliseconds.

Format

You must use the following format to specify the ring tone. You must use a colon (:) after the frequency. You must use a plus (+) sign between the times. You can press the + key several times for signal-pause times.

Example 1: 425Hz:960ms (75%)+3840ms

You can also specify a mixture of frequencies (two frequencies). You must separate the two frequency values with a forward slash (/).

Example 2: 425/833Hz:960ms (50%)+3840ms

Ring tone set up

Proceed as follows to configure a ring tone.

1. Click the **CHAP server** tab. The CHAP process that is started is displayed.
2. Click **Edit**. The **Chap - Edit dialog** opens.
3. Click the **CHAP adapter** tab.
4. Double-click **IPO-SIPEXT-IP-1**. The **[CHAP Adapter] - Edit dialog** opens.
5. Click the **Properties** tab.
6. Enter the respective settings under Content. Use the specified format.
7. Click **OK**.
8. Click **OK**.

Examples

The table below shows examples for a number of countries.

Country	Description	RingTone value
Germany	425 Hz tone for 1 second and 4 seconds pause	425Hz:1000ms + 4000ms
United States	Dual frequency tone (440 and 480 Hz) for 2 seconds and 4 seconds pause	440/480Hz:2000ms + 4000ms
United Kingdom	Dual frequency tone (400 and 450 Hz) for 0.4 seconds, 0.2 seconds pause, same tone for 0.4 seconds and 2 seconds pause	400/450Hz:400ms + 200ms + 400/450Hz:400ms + 2000ms
United States (reduced volume)	Dual frequency tone (440 and 480 Hz) for 2 seconds and 4 seconds pause	440/480Hz:2000ms (25%) + 4000ms
United Kingdom (enhanced volume)	Dual frequency tone (400 and 450 Hz) for 0.4 seconds, 0.2 seconds pause, same tone for 0.4 seconds and 2 seconds pause	400/450Hz:400ms (75%) + 200ms + 400/450Hz:400ms (75%) + 2000ms

Fax tone detection

You can switch on or off the fax tone detection and change the settings.

Settings: Fax tone detection

You must configure the following settings for the fax tone detection.

Settings	Explanation
FaxToneDuration	Minimum length of the fax tone in milliseconds before the fax tone is detected. Default: 120 ms. Range: 20 to 30000 ms.
FaxToneThreshold	Minimum amplitude height on the average over the before determined length of the fax tone before a fax tone is detected. Default: 300 (no unit) Range: 1 to 30000.
RingTone	Enter the ringtone in following format: 40/480Hz:2000ms+4000ms Default: 425Hz:960ms+3940ms for Germany

Switch off fax tone detection

If you indicate 0 for FaxToneDuration or for FaxToneThreshold, then the fax toner detection is switched off.

Fax tone detection set up

Proceed as follows to configure the fax tone detection.

1. Click the **CHAP server** tab. The CHAP process that is started is displayed.
2. Click **Edit**. The **Chap - Edit dialog** opens.
3. Click the **CHAP adapter** tab.
4. Double-click **IPO-SIPEXT-IP-1**. The **[CHAP Adapter] - Edit dialog** opens.
5. Click the **Properties** tab.
6. Enter the respective settings under Content.
7. Click **OK**.
8. Click **OK**.

Configuring the VEA

What is a VEA?

VEA stands for Voice Extension Adapter.

Note for assigning a VEA

You can assign a VEA one CHAP server if the host name match.

What does the VEA tab show?

The **VEA** tab lists all known Voice Extension Adapters and host names. The list shows the following information.

Header	Explanation
Name	Shows the name of the VEA.
Host name	Shows the network computer name of the VEA.
Session-ID	Shows the session ID of the VEA.
Start time	Specifies the time when the VEA is started.
Version	Shows the current version of the VEA.

Which actions can you execute with the VEA tab?

You can execute the following actions with the **VEA** tab.

Action	Explanation
Editing	Opens a selected VEA. You can edit the properties.
Insert	Inserts a new VEA.
Delete	Deletes a selected VEA.
Update	Updates the display. The start time and version information are updated.

Properties VEA

You can configure the following properties for the VEA.

Settings	Explanation
Name	Specifies the name of the Chat server.

Settings	Explanation
Hostname	Specifies the network computer name of the VEA. You can use the IP address.
SessionID	An entry is not possible.
Starttime	An entry is not possible.
Version	An entry is not possible.

Configuring the Chat server

What is a Chat server?

Chat refers to an communication over the Internet. The information is exchanged in text format.

Extensible Messaging and Presence Protocol (XMPP) is used for the IP Office Contact Center Chat.

In IP Office Contact Center you need a Chat server and a Chat taskserver.

What dies the Chat server tab show?

The Chat server tab lists all known Chat server with the host name. The list shows the following information.

Header	Explanation
Name	Shows the name of the Chat server.
Hostname	Shows the network computer name of the Chat server.
Port	Shows the port of the Chat server.

Edit, create or delete a Chat server

You can execute the following actions with the Chat server tab.

Action	Explanation
Edit	Opens a selected Chat server. You can edit the properties.
Create	Creates a new Chat server.
Delete	Deletes a selected Chat server. Note, that all configured elements (agents, topics) deleted also.

Porperties Chat server

You can configure the following properties for the Chat server. You can edit the taskserver.

Settings	Explanation
Name	Specifies the name of the Chat server.
Hostname	Specifies the network computer name of the Chat server. You can use the IP address.

Settings	Explanation
Port	Specifies the port of the Chat server. Default port 5222 is used.
Domain	Specifies the domain for Chat.
Encoding	You can select none encoding <none> or automatic encoding <autom. negotiation>.
Taskserver	Specifies the name of the taskserver.

Editing the Chat taskservers

You can edit the properties of the Chat taskserver.

Properties Chat taskservers

You can configure the following properties for a Chat taskserver.

Angaben	Erläuterung
Name	Specifies the name of the Chat taskserver.
Hostname	Specifies the host name of the computer on which the taskserver is working.
SessionID	Specifies the SessionID. This information can not be changed.
Start time	Specifies the start time. This information can not be changed.
Version	Specifies the version of the Chat taskserver. This information can not be changed.

Configuring the Chat server

What is a Chat script?

A chat script can use for a topic, an agent and in the TaskFlow editor. The configured text of a chat script is sent to the chat participants automatically. The agent appears the text as a system message.

What does the Chat script tab show?

The Chat script tab lists all Chat scripts with the name.

Edit, create or delete a Chat script

You can execute the following actions with the Chat script tab.

Action	Explanation
Edit	Opens a selected Chat script. You can edit the properties.
Create	Creates a new Chat script.
Delete	Deletes a selected Chat script. Note, that all configured elements (agents, topics) deleted also. If a chat script is used in an active TaskFlow, then the chat script can not be deleted.

Editing a Chat script

You can edit the properties of a Chat script.

Properties of a Chat script

You can configure the following properties for a Chat script.

Angaben	Erläuterung
Name	Specifies the name of the Chat taskserver. You can use 29 characters.
Text	Specifies the text of the chat script. NOTE: The character % can not be used.
Tag	You can use tags in the text. A tag is marked with a %.

Configuring the system settings

General

You can set the general system settings.

System language

Shows the system language. You can choose a language for the user interface.

Select a language from the list. The system language does not affect the language settings of individual users.

The selected language setting is activated after the next log-in on the system. You can also change the language setting with the **Agent Configuration** dialog.

You can select the following languages.

- German
- English

Pause codes

You can select whether you want to use pause codes.

Call list

The call list shows up to 100 different numbers. Once the maximum number is reached, the oldest entries in the list are deleted.

Using the call list at the topic

You can choose if you want to use call lists for topics or not.

Keep call list entries for

You can set for how long the calls in the call list of a topic are to be saved. After the time set the IP Office Contact Center system deletes the call list entries. The setting is valid for all topics of the IP Office Contact Center system.

You can set a value between one minute and 24 hours.

Time off

The **Definition of time off** tab shows the defined time off periods with the following information.

- Start
- Stop
- Repetition

When do you use time off?

You can use time off for the call distribution (task flow processing). You can use the time-specific keyword `t.holiday` in a logic of the **Taskflow Editor** application. The keyword `t.holiday` becomes 1 if a time off period is defined for the present time.

What is the difference between breaks and blocked periods?

Time off is, other than blocked periods, valid for the whole IP Office Contact Center system.

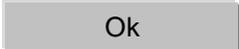
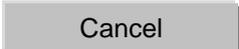
Which actions can you execute with the Definition of time off tab?

You can execute the following functions with the **Definition of time off** tab. There is a button for each action.

Action	Explanation
Insert	Creates a new time off period with the configured properties.
Editing	Opens the selected time off period. You can edit the properties
Delete	Deletes the selected time off

Which settings can you configure for time off periods?

You configure the following properties for a time off period.

Property	Explanation
Repetition	Specifies the repetition of time off periods.
<input checked="" type="radio"/> None	You can select whether a break is to be repeated daily, weekly, yearly, or not at all.
<input type="radio"/> Daily (e.g. regular breaks)	An example of a daily repetition is the daily lunch break from 12:00 p.m. to 12:30 p.m.
<input type="radio"/> Weekly	
<input type="radio"/> Yearly (e.g. national holidays)	
Start of time off	You can set the date and time you want time off to start. If you set <input checked="" type="radio"/> Daily or <input checked="" type="radio"/> Weekly, you can only set the time. If you set <input checked="" type="radio"/> Weekly, you can select a day. You can enter the time or use  (up and down) to set the time. You can enter the date or click  . A calendar in month view opens. A red circle  indicates today's date. A blue circle  indicates the set date.
End of time off	You can set the date and time you want the time off to stop. The settings are the same as for the start of the blocked period described above. The end of the time off must be after the start.
	Confirms your entries and closes the dialog.
	Closes the dialog without applying the changes.

Reporting settings

The **Reporting Settings** dialog shows the general settings for reporting. The task type-specific reporting settings are shown on individual tabs.

Changes become effective starting from the next interval.

General reporting settings

General reporting settings are valid for all task types.

Reporting method

The reporting method shows which method is set for your IP Office Contact Center system. You can choose between interval-related and back office reporting in the IP Office Contact Center system.

You can select the reporting method during the guided installation under **Reporting type**.

Default: Interval-related reporting

Interval-related reporting is used as default.

Back office reporting

You have to select **Back office** as the **Reporting type** during the guided installation if you want to use this method.

For further information please refer to the documentation User Interface.

Calculating period of time

The calculated period of time shows the duration of a reporting interval in minutes. After each interval the value for the Task Service Factor (TSF) is reset to 100% and the calculation started anew. The Customer Service Factor (CSF) is also evaluated for the calculated period of time.

You can set the following values for the calculated period of time: 1, 5, 15, or 30 minutes.

Reporting data is available in the following resolution

A list shows the resolution of reporting data.

The list shows the following information for reporting data.

- Start time
- Calculating period of time

Run compression

Shows the settings for compressing reporting data.

A database stores the reporting data. You can limit the storage requirement if you compress the data. However, the resolution of the reporting data is reduced when you compress the data. You can select after which period you want to compress the reporting data.

Run compression

You can select whether you want to compress the reporting data. The data of all task types is compressed.

Smallest interval

You can select the smallest interval.

You can select one of the following settings.

- 30 minutes
- 60 minutes
- 120 minutes

Compress to smallest interval after x days

The reporting data is compressed after the time set (x days). The data is calculated for the new resolution. The resolution of the data then matches the selected smallest interval.

Compression to one day after y days

The reporting data is compressed after the time set (y days). The data is calculated for the new resolution. The new resolution of the data is one day.

The value for y must not be smaller than the value for x.

Delete reporting data automatically

You can have reporting data deleted after a certain period (days). Only the statistics data are deleted. For the task report data the period must be set separately. See topic: [Task Report](#)

This period must be more than 90 days. You get a corresponding error message if you want to enter a shorter period.

Default setting:

- Delete reporting data automatically after 365 days

Reporting settings for the task type Telephony

In the **Telephony** tab you find the reporting settings for the task type Telephony. You can set the reporting settings for topics, agent groups and agents.

You can configure the following reporting settings (basic values) for topics.

- Number of conversations
- Number of unanswered calls
- OD: Number of calls ended by external party

You can configure the following reporting settings for agent groups.

- Number of conversations
- Number of unanswered calls

You can configure the following reporting settings for agents.

- Number of conversations
- OD: Number of calls ended by external party

Ring time threshold

The ring time threshold defines when (duration of ringing) a call is counted as having exceeded the ring timeout. Enter the time in seconds. You can enter a minimum of 0 and a maximum of 240 seconds.

totNExp1 stands for total of calls exceeding the ring time.

Number of conversations

totNConvWait stands for total conversations.

TotNConvWait <= N

A conversation call is counted if the wait time is shorter or equal to the set value.

TotNConvWait > M

A conversation is counted if the wait time is longer than the set value. The value must be greater than the value for TotNConvWait <= N.

TotNConvWait > N <= M

Shows the values of the first and second wait times.

Number of unanswered calls

totNAbanWait stands for total abandoned calls.

TotNAbanWait <= N

An abandoned call is counted if the wait time is shorter or equal to the set value.

TotNAbanWait > M

An abandoned call is counted if the wait time is longer than the set value. The value must be greater than the value for TotNAbanWait <= N.

TotNAbanWait > N <= M

Shows the values of the third and fourth wait times.

OD: Number of calls ended by external party

OD stands for Outbound Dialer.

You can set a time in seconds for the counter. A call initiated by the Dialer counts as ended if the call was shorter than the time set.

Reporting settings for the task type Email

The **Email** tab includes reporting settings for the task type Email. You can set the reporting settings (basic values) for topics, agent groups and agents.

Number of emails

totNDone stands for number of processed emails. The counter counts all emails processed by the agent.

1. Wait time $\leq x$

The counter counts all mails that did not wait longer in the topic mailbox than a configurable time x . The minimal first wait time to be set is 0:30 h.

2. Wait time $> x$ h and $\leq y$ h

Counts all emails that waited longer than a set time x and shorter than a set time y in the mailbox of the topic. The configurable maximum second wait time is 168:00 h.

What is wait time?

Wait time is the configurable time when the counter totNDone starts counting.

Reporting settings for the task type Chat

In the **Chat** tab you find the reporting settings for the task type Chat. You can set the reporting settings for topics, agent groups and agents.

You can configure the following reporting settings (basic values) for topics.

- Number of chat sessions
- Number of unanswered chat requests

You can configure the following reporting settings for agent groups.

- Number of chat sessions
- Number of unanswered chat requests

You can configure the following reporting settings for agents.

- Number of chat sessions

Number of chat sessions

totNConvWait stands for total chat sessions.

TotNConvWait <= N

A conversation call is counted if the wait time is shorter or equal to the set value.

TotNConvWait > M

A chat session is counted if the wait time is longer than the set value. The value must be greater than the value for **TotNConvWait <= N**.

TotNConvWait > N <= M

Shows the values of the first and second wait times.

Number of unanswered calls

totNAbanWait stands for total abandoned calls.

TotNAbanWait <= N

An abandoned chat request is counted if the wait time is shorter or equal to the set value.

TotNAbanWait > M

An abandoned chat request is counted if the wait time is longer than the set value. The value must be greater than the value for **TotNAbanWait <= N**.

TotNAbanWait > N <= M

Shows the values of the third and fourth wait times.

Deleting reporting data

You can delete reporting data for a certain period if you need it no longer. Please note that once you have deleted the data it cannot be recovered.

Format for the period

Use the format DD.MM.YYYY for specifying the period.

You can enter the date or click . A calendar in month view opens. A red circle  indicates today's date. A blue circle  indicates the set date.

Prerequisites

Privilege

To delete reporting data, you must have the following privilege.

- Delete data (Reporting tab)

Set privileges for an agent.

Recorded period

You can only delete data within the recorded period of time.

Deleting reporting data

If you no longer need data for a certain period of time, you can delete it from the database. Use this feature e.g. for the data of a period you already analyzed thoroughly.

Note

Once data is deleted it is irretrievably lost.

Delete

To delete data, follow these steps.

1. In the System menu, select Delete reporting data. The Delete Reporting Data dialog opens.
2. Click  (down). A calendar opens.
3. Select a date.
4. Click **OK**.
5. You are prompted.
6. Click **Yes** to delete the data. The data is deleted.

Realtime information default values

The **Realtime information default values** dialog shows the general settings for the **Realtime information** module. The task type-specific realtime information settings are shown on individual tabs.

General realtime information default values

Calculating period of time

The calculated period of time shows the length of a realtime information interval in minutes. After an interval the value for the TSF is reset to 100% and the calculation starts anew. The DTSF (Dynamic Task Service Factor) is also evaluated for the calculated period of time.

You can select one of the following values: 1, 5, 15, 30 and 60 minutes.

Information: update interval

Periodic realtime information is updated after the displayed time.

Realtime information default values for the task type Telephony

You can configure the wait time threshold for TSF and DTSF for topics and agent groups. You can also set the wait time threshold for the TSF for teams. These values are used as default values for the configuration. You can set the calculated period of time for TSF and DTSF. These values apply for the **Realtime information** module.

Wait time threshold for TSF

You can set the wait time threshold for the TSF. The wait time threshold can be set between 5 and 900 seconds (15 minutes).

The wait time threshold determines the duration in seconds, after which an email is counted as having waited too long without being opened. Every call that has to wait in the queue for more than the duration set lowers the TSF.

Wait time threshold for dynamic DTSF

The wait time threshold determines the duration in seconds after which an email is counted as having waited too long without being opened. Every call that has to wait in the queue for more than the duration set lowers the DTSF.

Realtime information default values for the task type Email

You can configure the wait time threshold for TSF and DTSP for topics and agent groups. You can also set the wait time threshold for the TSF for teams. These values are used as default values for the configuration. You can set the calculated period of time for TSF and DTSP. These values apply for the **Realtime information** module.

Wait time threshold for TSF

You can set the wait time threshold for the TSF. You can set the wait time threshold for TSF in hours and minutes (hh:mm).

The wait time threshold determines the duration in hours and minutes, after which an email is counted as having waited too long without being opened. Every email that has to wait for more than the duration set reduces the TSF.

Wait time threshold for dynamic DTSP

Indicates the duration in hours and minutes, after which an email is counted as having waited too long without being opened. Every email that has to wait for more than the duration set reduces the DTSP.

Realtime information default values for the task type Chat

You can configure the wait time threshold for TSF and DTSF for topics and agent groups. You can also set the wait time threshold for the TSF for teams. These values are used as default values for the configuration. You can set the calculated period of time for TSF and DTSF. These values apply for the **Realtime information** module.

Wait time threshold for TSF

You can set the wait time threshold for the TSF. You can set the wait time threshold for TSF in hours and minutes (hh:mm).

The wait time threshold determines the duration in hours and minutes, after which a chat request is counted as having waited too long without being opened. Every chat request that has to wait for more than the duration set reduces the TSF.

Wait time threshold for dynamic DTSF

Indicates the duration in hours and minutes, after which a chat request is counted as having waited too long without being opened. Every chat request that has to wait for more than the duration set reduces the DTSF.

Variables

You use variables with the **Taskflow Editor**. You have to configure variables before you can use them. You can access variables with the **Realtime information** module and change the configured values.

You can define variables for the following objects.

- <Global>
- Agent
- Agent group
- Topic
- VU script

Which actions can you execute with the Defined Variables dialog?

You can execute the following functions with the **Defined Variables** dialog. There is a button for each action.

Action	Explanation
Insert	Creates a new variable with the respective properties.
Change	Opens the selected variable. You can edit the properties
Delete	Deletes the selected variable.

Inserting or changing variables

You configure an object, a tag and a value for variables. The dialog shows the data type and if possible the resolution for each variable.

Object

Shows the object. You can select an object. If you select Global you can use the variable for all objects.

Tag

You can select a tag. The tag has to be configured. You can only use user-defined tags for a variable. You configure tags with the **System** menu.

Value

Shows the value of the variable. You can change the value.

Selecting a tag

The **Select Tag** dialog shows the tags with name, type, data type and resolution. You can select a tag for the variable.

Tag list

The **Defined Tags** dialog shows the defined task tags. It makes no difference whether a tag is system-specific, user-defined or a skill.

The following information is listed.

Setting	Explanation
Name	Shows the name of the tag.
Type	Shows the data type of the task tag (user, system, skill).
Data type	Shows the data type of the task tag (string or number).
Resolution	Shows the resolution of the task tag (whole numbers only).

What is a tag?

A tag can be added to a task. You can evaluate tags in a task flow set.

Which actions can you execute with the Defined Tags dialog?

You can execute the following actions with the **Defined Tags** dialog. There is a button for each action.

Action	Explanation
Insert	Creates a new tag with the respective properties.
Change	Opens the selected tag. You can edit the properties
Delete	Deletes the selected tag. You cannot delete system-specific tags.

Inserting or changing tags

You configure name, type, data type and perhaps resolution for a tag.

Name

Shows the name of the tag. You can use 29 alphanumeric characters maximum.

Type

Shows the type of the tag. You can make a tag accessible for yourself only (user-defined), for the whole system (system-specific) or define it as skill.

Data type

Shows the data type of the tag. You can choose String, Number, Time in GMT or Duration in seconds.

Resolution

If you select integer as the data type, you can determine the resolution. The following settings can be chosen.

Integer	e.g. 42
tenth	e.g. 46.1
hundredth	E.g. 46.14

Can be changed by CGI server

You can set whether the CGI server may change a tag or not.

Please note that if a task Tag is modifiable unauthorized persons might be able to change the tag as well.

Overwrite-protection

You can determine whether a task tag is overwrite-protected.

Applying Tags into Task resulting from Conference/Transfer

Explanation

Whether to apply tags from initial call (C1) or from consultation (C2) into the resulting call depends on the meaning of the tag and on customer. You can define how it will be handled in the configuration of each tag.

When transferring, a new connection (C3) is established after consultation.

No new connection is established after conference. The resulting connection is the original call (C1).

Tags from the original connections are always applied to the new connections. Tags from conferences are ignored by default.

Tag coming from a conference can be applied when configured accordingly. You can configure for a conference tag to always apply into the resulting connection. Is the same tag available in the original connection, its value will be overwritten (C1 value is preserved).

Task: E-Mail

Delegating e-mails behaves like call transfer. Therefore the same rules apply for delegating.

Possible options

With the following options you can specify what happens with a tag when a call is transferred, a conference initiated or an e-mail delegated.

- Ignore
The tag from a consultation is not applied to the resulting task.
- Apply, where applicable overwrite
The tag will be applied and overwritten where applicable.
- Apply only if transferred, where applicable overwrite
The tag will be applied only if transferred and overwritten where applicable.
- Only applied if not available in the original task
The tag will be applied only when not available in the original task (call).

Examples

Examples for a useful tag configuration in case of transfer or consultation:

Task	Option
LastTopicName	apply, where applicable overwrite
FirstTopicName	apply only if not available in the original task

Which tags are prepared in the IP Office Contact Center system?

For information on the prepared tags <system>, see **TaskTags manual**.

Configuration report

You can export the current configuration data into Microsoft **Excel** sheets.

All exported configuration data is displayed in tabular form. You can edit, save and print this data.

What do you need for a configuration report?

You need Microsoft **Excel** version 5.0 or higher. The software must be installed on your PC.

How long does the export take?

Please note that depending on the volume of your data the export may take a few minutes.

Which configuration data can you export?

You can convert the following configuration data.

Topics

- General
- Blocked periods per topic
- Announcements per topic
- Skills per topic

Agent groups

- General
- Agents per AG
- Virtual AGs

Agents

- General
- Topic authorization
- AG authorization
- Agent authorization
- Team authorization
- Telephone authorization
- Telephone group authorization
- Campaign authorization
- Privileges
- Skills per agent

Profiles

- General
- Topic authorization
- AG authorization
- Agent authorization
- Team authorization
- Telephone authorization
- Telephone group authorization
- Campaign authorization
- Privileges

Others

- Team composition
- Announcements
- Announcement scripts
- Voice unit
- VU scripts
- Shift plan
- Queue device
- Defined tags
- Variables
- External destinations
- Customer recognition
- PBXs
- Country setting
- Task server/CHAP
- System
- External display
- Wallboards
- Job codes
- Reporting filters
- Telephone
- External line
- Chat server
- Chat scripts

Availability for tasks

The **Availability for Tasks** dialog shows for each task type, which conditions must be met for the agent not to receive additional tasks.

You determine these settings with the default settings.

Task type Telephony

You can configure the following settings for the task type **Telephony**.

How many calls maximum does the agent get?

You can either select 0 or 1 as maximum number of calls.

Does the agent get emails while they get a call or are on the telephone?

You can select Yes or No.

Setting	Explanation
Yes	If it rings or the agent holds a conversation, then the agent can receive further emails.
No	If it rings or the agent holds a conversation, then the agent does not receive further emails.

Does the agent get chat requests while they get a call or are on the telephone?

You can select Yes or No.

Setting	Explanation
Yes	If it rings or the agent holds a conversation, then the agent can receive further chat requests.
No	If it rings or the agent holds a conversation, then the agent does not receive further chat requests.

Task type Email

You can configure the following settings for the task type **Email**.

How many emails maximum does the agent get?

You can select or enter a value between 0 and 100 for the maximum number of emails.

Does the agent get calls while they process an email?

You can select Yes or No.

Setting	Explanation
Yes	If the agent process an email (email is opened), then the agent can receive calls.
No	If the agent process an email (email is opened), then the agent does not receive calls.

Special feature

As default for the setting No, the agent receives no calls when opening an e-mail.

You can change this setting. The agent receives no calls when e-mails are available in his inbox.

- You must create a global variable `g.CCK_AlertingEMailBlockCond`.
- Variable type must be integer.

- Variable value must be 1.

This setting will be immediately effective in the server components and applies with the next change of the agent state.

Does the agent get chat requests while they process an email?

You can select Yes or No.

Setting	Explanation
Yes	If the agent process an email (email is opened), then the agent can receive chat requests.
No	If the agent process an email (email is opened), then the agent does not receive chat requests.

Task type Chat

You can configure the following settings for the task type **Chat**.

How many chat requests maximum does the agent get?

You can select or enter a value between 0 and 100 for the maximum number of chat requests.

Does the agent get a call while they process a chat request?

You can select Yes or No.

Setting	Explanation
Yes	If the agent process a chat request, then the agent can receive further calls.
No	If the agent process a chat request, then the agent does not receive further calls.

Does the agent get emails while they process a chat request?

You can select Yes or No.

Setting	Explanation
Yes	If the agent process a chat request, then the agent can receive further emails.
No	If the agent process a chat request, then the agent does not receive further calls.

Skill overview

The **Skill Overview** dialog shows tabs with the following skills.

- Agent skills
- Topic skills

Skills must be configured in the tag list.

See: **Configuring tags (skills)**

List box: View

A drop-down list-box shows the objects configured specifically for skills. You can select different objects.

The respective objects are displayed for the following task types.

Task type	Object
<All>	Shows all objects.
Telephony	Show the skills and skill levels for Telephony.
Email	Show the skills and skill levels for Email.

Tab: Agent skills

You can enter agents' knowledge and capabilities with the **Agent skills** tab. Agents and configured skills are listed in a table. You have to enter a skill level for a skill. 100 is the maximum setting. The value shows the skill level in percent. You thus specify the agent's minimum requirement.

Proceed as follows to enter new values.

1. Edit a field and enter a value. Newly entered settings are in red writing.
2. Click **Apply**. The settings are applied and the writing changes to black.

The following table shows an agent skill example.

Agent skills			
	A_speaks_German	A_speaks_English	A_speaks_Spanish
A001	100	80	-
A002	100	-	50
A003	50	100	-
A004	50	20	50
A005	20	100	100

Tab: Topic skills

You can enter agents' knowledge and capabilities regarding topics with the **Topic skills** tab. Topics and configured skills are listed in a table. You have to enter a skill level for a skill. 100 is the maximum setting. The value shows the skill level in percent. You thus specify the agent's minimum requirement for topics.

Proceed as follows to enter new values.

1. Edit a field and enter a value. Newly entered settings are in red writing.
2. Click **Apply**. The settings are applied and the writing changes to black.

The following table shows a topic skill example.

Topic skills	Knows_product_A		Knows_product_B		A_speaks_German	
						
Topic 001	50	50	-	-	90	80
Topic 002	90	-	80	-	90	80
Topic 003	90	90	50	50	90	80
Topic 004	-	-	50	-	90	80
Topic 005	80	-	30	-	90	80

Interface for staff planning

The reporting data of a IP Office Contact Center system is stored in the internal tables of the IP Office Contact Center system Sybase database in a complex structure. To offer external modules (INVISION) easy access to reporting data, it is possible to provide edited data referring to topics via an ODBC interface on a daily basis.

Prerequisites for using the interface for staff planning

The following prerequisites must be met if you want to use the interface for staff planning.

- The XSTAT server must be installed and configured at the IP Office Contact Center system server. The `xstat_srv` process must be running.
- A Sybase ODBC driver must be installed and configured for the external module.

Time settings

You configure start time, duration and interval for the surveyed period (daily).

The following table shows the settings and provides explanations.

Setting	Explanation
Start time	Shows the start time for the reporting survey. Use the format hh:mm (hours, minutes).
Duration	Shows the duration of the reporting survey. Use the format hh:mm (hours, minutes).
Interval	Shows the reporting interval for the reporting survey. You have to enter either the calculated period of time for the reporting settings or a multiple of this value. Use the format hh:mm (hours, minutes).
Start calculation	Shows the start of the calculation. You usually start the calculation at a low-load time, e.g. at night. Use the format hh:mm (hours:minutes).
Keep data for	Shows for how long the data is kept in the IP Office Contact Center system database (Xstat table). The data is overwritten after this period.

Counters

There are three tabs (Topic counters, Agent group counters and Agent counters) with which to select counters. Each of these three tabs features a list of counters.

A list shows the counters for the staff planning interface. The list shows only counters for topics with the task type telephony. You can select counters.

Task report

You can start or stop task reports.

Prerequisite

To start or stop task reports, you must have the following privilege.

- **Start/stop reports** (Other tab)

View option

A list shows the task reports with the following settings.

Name

Shows the name of the task report.

The following task reports are created by default.

- LevelOne
- LevelTwoAgent
- LevelTwoTopic
- AgentLogging

Status

Shows the status: active or inactive.

Starting or stopping

To start or stop a task report, follow these steps.

1. Under **System**, select **Task report**. The **Task Report** dialog opens.
2. Select a task report.
3. Depending on the state, you can either start or stop the task report.

Deleting data

You can configure the time period for automatic deletion of task report data.

Time period

You can set the time period to 90 days minimum and 24855 days maximum.

Note

Restart the process `tr_srv` to use changes.

Configure

Proceed as follows.

1. Select **Task Reports** in the **System** menu. The dialog **Task Reports** opens.
2. Select **Automatic deletion of task report data**.
3. Enter a time period in days.
4. Click on **OK** to save your settings.

Shift plan

The shift plan is used for the following online realtime information. The online realtime information is reset (to zero) at the start of each new shift.

1. Topic realtime information: Number of conversations per shift (Telephony)
2. Topic realtime information: Total of all calls transferred to external destinations per shift (Telephony)
3. Agent realtime information: Number of conversations per shift (Telephony)

Shifts

You can include any number of shifts in the shift plan. You either treat the shifts alike for all weekdays or you can set the respective shifts for each individual weekday.

If you want to configure shifts for each weekday you have to remove the checkmark for **all days identical**.

You can add or delete shifts or delete all shifts.

You can only set the start time for a shift. Each start resets the respective realtime information.

Configuring the service settings

Overview of service settings

You learn about the possible service settings and how you configure these settings.

Prerequisite

You need the corresponding special privilege to change the service settings.

List of service settings

You can change the following service settings if you are signed on as a user with permission to change these settings.

- Reporting filters
- Special settings
- Telephone default settings
- Announcement modules
- PBX
- Country settings
- Queue device
- Telephone
- CHAP server
- Access code agents
- Access code topics
- Email settings

Reporting filters

The **Reporting filters** dialog lets you configure system-wide which reporting data can be evaluated in the IP Office Contact Center system. You can e.g. exclude data from being evaluated for labor legislation reasons.

There are individual counters for each task type. The tabs show the counters for the different task types.

Prerequisite

To set reporting filters, you must be signed on as a user with permission to do so.

Which types are there?

You can select the following types. The corresponding counters are displayed.

- Shows the name of the task report.
- Agent group
- Dialer
- Line
- Skill combination
- System
- Team
- Telephone
- Topic
- PBXs
- Voice unit

List of counters

A list shows the counters of the respective type. The counters of a type are subdivided into topics.

A + (plus) shows that there are further counters for this topic. Click the plus to have all counters of this topic displayed. You can also click a topic to change the structure.

Selecting the view

You can choose whether the abbreviations or names of counters are to be displayed for the type of reporting filter. Select an option.

If name is selected the special characters * and # mean the following. An asterisk (*) signals that in the evaluation the counter is broken down into agent groups. A hash (#) signals that the counter is broken down into topics.

Where can you get additional information on counters?

For further information on reporting counters please refer to the documentation of the **statistics counters**.

Modifying the reporting counter name

You can modify the name of a reporting counter. The system name will always be added in brackets to the new name. The modified name will be used in all reporting displays and evaluations. Please notice that the headers of reporting evaluations become multi line for long counter names. In the headers, a line break occurs after 40 characters.

Modify

Proceed as follows to modify the name.

1. Double-click the reporting counter. The dialog **Modify Counter Name** opens.
2. Enter the new name. The name can be 255 characters long.
3. Click on **OK** to save your settings.

Reset

To reset the modified name to the system name proceed as follows.

1. Double-click the reporting counter. The dialog **Reset Counter Name** opens.
2. Click on **Delete**. The system name is now assigned to the counter.

Special settings

You can configure the following special settings.

- Allow changing topic names
- Allow changing agent group names
- Minimum team size
- Reporting from caller's point of view
- Reporting type
- Reporting/Realtime information
- Last/Current agent routing function

Prerequisite

To set special settings, you must be signed on as a user with permission to do so.

Allow changing topic names and Allow changing agent group names

If the two boxes are checked an agent with normal privileges can change the names of topics and agent groups. This is the default. You determine the usual privileges with the Agent privileges.

If the two boxes are not checked only service personnel with the necessary password can change the names.

Minimum team size

You can configure how many agents have to be members of a team. This number is checked if a team is configured.

You can set between 0 and 1000 members as minimum size.

Reporting from caller's point of view

You can select whether connections with external destinations are to be counted as successful.

Reporting type

You can select a reporting type as an option.

Setting	Explanation
Interval reporting	The Interval reporting option lets you save conversation times, call times and other times in their respective intervals.
Back office reporting	The Back office reporting option stores all counters in the intervals in which the call entered the system. For more detailed information, see the IP Office Contact Center user manual. Note: If you change the reporting type, you can no longer evaluate old data. You must restart the PC for the change to take effect.

Reporting/Realtime information

Time slot for redialing

You can enter between 5 minutes and 12:00 hours for the time slot for redialing.

Callers who call again in the time span after a first call does not go through are counted as redialers.

Time slot for First Call Resolution

First Call Resolution (FCR) numbers the portion of the requests, which are finished with the first call. If a caller in the time slot does not call again, then the call is considered as finished.

For the time slot you can enter a value between 1 hour and 7 days. Default is 3 days.

If the IP Office Contact Center server is started, then the time slot starts. Previous calls are not considered for the statistics.

Last/Current agent routing function

You can select the Last and current agent routing function as an option.

Setting	Explanation
System-wide	The System-wide option saves the caller number and connected agent to a topic following a conversation. If the caller calls again in the defined period, he is reconnected to the same agent, even if the topic is different.
Topic-specific	The Topic-specific option connects the caller to the same agent only if he selects the same topic.

Additionally send as an Email

If you want to send automatic statistics as an Email, you must specify an SMTP server. An Email contains the automatic statistics as an attachment.

1. Configure the SMTP server name under **Service > Special Settings**.
For example: mailserver.com
2. Configure the output email message format in the database.
 - a. Check the **Additionally send as email** check box.
 - b. Enter an email address.
 - c. Enter a subject.

Telephone default settings

You can configure default settings for telephony.

Prerequisite

To set **telephone default settings**, you must be signed on as a user with permission to do so.

Telephone settings

You can make the following telephone settings.

Setting	Explanation
Automatic answer <input checked="" type="checkbox"/> for incoming ACD calls <input checked="" type="checkbox"/> for outgoing ACD calls (dialers) after x s	You can enable or disable automatic answer. A call is answered automatically after the specified time. The agent does not have to click the Answer key. You can set a time between 0 and 255 seconds.



Inserting or changing an announcement module

You can insert a new announcement module or edit a configured announcement module.

Pseudo number

Shows the pseudo number of the announcement module.

Name

Shows the name of the announcement module. You can use 30 alphanumeric characters maximum.

Access code agents and Access code topics

The **Access code agents** and **Access code topics** dialogs show the external line code, extension length and PBX.

Prerequisite

To **configure settings for access code agents and access code topics**, you must be signed on as a user with permission to do so.

Which actions can you execute with the Access code agents dialog?

You can execute the following actions with the **Access Code Agents** and **Access Code Topics** dialogs. There is a button for each action.

Action	Explanation
Change	Opens the Access Code - Edit dialog. You can edit the properties.
Insert	Opens the Access Code - Create dialog. You can edit the properties.
Delete	Deletes the selected external line code.

Editing an external line code

You can edit the following properties.

PBX

Shows the name of the PBX.

Access code

Shows the external line code of the PBX, 4 digits maximum.

Digits for extension

Shows the length of the extension number. The length of external line code plus extension is limited to 9 digits. You can enter a minimum length of 0 (zero).

Email settings

The **Email settings** dialog lets you define the system settings for UMR domains and the prefix and postfix for the ticket IDs.

Prerequisite

To **define email settings**, you must be signed on as a user with permission to do so.

System settings tab

You must enter the following settings on the Email settings tab. You need these settings if you are using UMR in the IP Office Contact Center system.

System setting	Explanation
UMR Domain	Enter the agent and topic domain. Note: In the Email configuration module, you must also configure this UMR domain under Local accepted DNS domains . Example: company.com
Prefix for ticket ID	You can enter a prefix for a ticket ID. If you enter a prefix, this prefix is displayed in front of the ticket ID in the subject line of email replies or forwards.
Postfix for ticket ID	You can enter a postfix for a ticket ID. If you enter a postfix, this postfix is displayed after the ticket ID in the subject line of email replies or forwards.

Chat settings

You can use an archive database for chat.

Prerequisite

A chat archive database has to be installed.

Archive settings

Activate archive

You can activate the archive for chat requests.

Start time for deletion

Specifies the hours and minutes after midnight when the deletion starts. The deletion starts every day.

Standard: 2:30 hours

Delete archive data automatically

Displays the time chat requests are stored in the archive database. Older chat requests are deleted from the archive database.

The period is set for the TR report.

Using the Help and About dialogs

Using the Help

The **Configuration** module offers a dialog-oriented, context-sensitive Help function for all menus, commands and dialogs. You can search for information on a certain topic.

Help during the operation

You can open Help information for each command and dialog.

1. A dialog is open. Press the **F1** key. The Online help for this dialog opens.

Starting the Online Help

You want to read the contents of the Online Help.

1. Select **Contents** from the **Help** menu The Online help opens.
2. Click a text to obtain further information about the topic.

Displaying information about the Configuration module

You can have information displayed about the manufacturer and the program version.

Information in the About Configuration dialog

The **About Configuration** dialog provides the following information.

Name

Shows the icon, name and release of the **Configuration** module.

Copyright

This information shows the copyright.

Other ways to get help

You can get additional support on the Internet.

Information on the Internet

Please refer to the following Internet site for information on IP Office Contact Center systems.

www.avaya.com

Glossary

ACW

ACW stands for After Call Work.

AES

The AES server is a media server. This media server establishes the TSAPI connection between the IP Office Contact Center system and PBX.

CSV

CSV stands for separated values or comma separated values. A CSV file is a text file for saving or exchanging data with a simple structure.

Fax

Fax is short for facsimile or telefacsimile.

NC

NC stands for network computer. Network computers are terminals adapted to the Internet. Since NCs have their own local CPU power, they are referred to as network computers instead of network terminals. NCs are computers that do not have a hard disk and download their software from the network.

RPC

RPC stands for Remote Procedure Call. An RPC is the call of a procedure in a module or task that might be located on a remote PC. Strictly speaking, a procedure is called on the local host and run on the remote host. Possible results and the end of the procedure are returned to the first PC (local host).

SMS

SMS stands for Short Message Service and is a telecommunications service for transferring text messages.

TSF

TSF stands for Task Service Factor.

UNC

UNC stands for Uniform Naming Convention. UNC is a widely accepted standard for addressing shared resources (folders, drives and the like) on a PC network. It eliminates the need to assign a drive letter to connect. Example: [\\servername\sharename\path](#) (Windows).

VEA

VEA stands for Voice Extension Adapter.

Index

A

- Abbreviation 132
- About Configuration 21
- Access code 28, 133, 136, 142
- Access code agents 20
- Access code topics 20
- ACD 196
- ACM 149
- ACW 28, 71, 76
- ACW{ 71
- Address book 68
- Advanced archive view 81
- Agent 16, 18, 65
- Agent group 16, 18, 28, 52
- Agent logging 88
- Agent profile 16, 18
- Alias 66, 76
- Alternative routing 59
- Announcement 17, 19, 48, 82, 99, 101
- Announcement factor 58
- Announcement modules 20
- Announcement script 17, 19
- Announcement text 99, 103, 106
- Area code 135
- Assignment 54
- Authorizations 70, 92
- Automatic Agent 111
- Automatic login 81
- Availability 69
- Availability for tasks 19, 183
- Available longest 57

B

- Back office reporting 168, 194
- B-channels 141
- Blocked periods 26, 27, 38, 81, 166
- Brackets 22

C

- Calculated period of time 168, 174, 175, 176, 187
- Calculating period of time 98, 168, 174
- Call list 165
- Callback from call list 85

- CHAP 152
- CHAP server 17, 20, 152
- Cockpit bar 78
- Color 132
- Columns 23
- Comment 101
- Company entry 113
- Compression 169
- Configuration 18
- Configuration report 19, 181
- Contact evaluation 88
- Contact time 47
- Contents 21
- Control file 120
- Cost center 67
- Counter 191
- Country code 145
- Country setting 17, 20, 145
- Create 26
- Current agent 30, 46
- Customer 17, 18
- Customer data 118
- Customer number 114
- Customer recognition 82, 113

D

- Data type** 179
- Database 17
- Delay time 123
- Delete 26
- Delete Reporting Data 19
- Dialed topic** 117
- Dialer 88, 196
- Distribute call after release by agent - max. times 29
- DSPF 48

E

- Edit 26
- Edition 14
- Email 17, 21
- Email address 25, 123
- Email settings 20, 200
- Employee ID 67
- Enable 99
- End of script 105
- English 165
- Extension 28
- External destination 17, 19, 122
- External line 135

F

- First name 67
- First screen 78
- Four-eye principle 68, 77
- From 33, 73

G

General 19
German 165
Group assignment 72

H

Header 135
Help 21, 201
Hierarchical 57
High load system 47
Hold announcements 49
Hold duration 47
Hold time 46
Home configuration 78
Host name 141

I

Import 121
Import file 120
Info field 27
Information 13
Information on the Internet 202
Inheritance 89
Interface for staff planning 19, 82, 187
Interruptible 101
Interval reporting 194
Interval-related reporting 168
IVR Editor 88

J

Job code 30, 31, 40, 76, 134
Job code input 76
Job code length 40

K

Keep data for 187
Kernel 47
Keyboard 24

L

Language 67
Last agent 30, 31, 46
Last name 67
Line allocation 111
Location 132

M

Mail server 109
Mailbox 31, 73
Mailbox Details 33
Max. reservation time 28
Menus 18
Mouse button 24

N

National code 145
NC 126, 127
Night service 59
Number 123, 147

O

Objects 16
Overflow factor 58
Overflow groups 59
Overflow topic 29

P

Pass on 75
Password 68, 72, 76
Pause code 17, 19, 130, 165
PBX 17, 20, 25, 28, 52, 57, 65, 71
PC 17, 30, 31, 40, 59, 126, 127
PCM 101
Personal contacts 116
POP3 33
Postfix for ticket ID 200
Prefix for ticket ID 200
Print emails 81
Priority 27, 54, 115
Privileges 69, 75, 76, 92
Profile 68, 89, 92

Q

Queue device 17, 20, 147, 148
Queue factor 58

R

Realtime Information 55, 85
Realtime information default values 19, 174
Remote functions 85
Reply as an agent 81
Reply to 33, 73
Reporting 84
Reporting data 173
Reporting filters 20, 191
Reporting method 168
Reporting settings 19
Reporting type 194
Reservation time 31
Ring time threshold 170
Ring timeout 58
Ring tone 157
RingTone 157
Routing 47, 57

S

Save settings 20
Script for playing voice mails 29
Scripts 111

- Search fields 21
- Selecting 24
- Service 20
- Service settings 190
- Session-ID 137, 138, 152, 160
- Shift plan 19, 82, 189
- Shifts 189
- Signaling threshold 59
- Signoff prevention 61
- Signon and signoff 54
- Skill 41, 69, 82, 185
- Skill overview 19
- Skills 30, 31
- SMTP 33
- Sound file 101
- Special settings 20, 193
- Start calculation 187
- Start time 137, 138
- Status 101
- Status bar 20, 21
- Structure 14
- Subscriber number 25, 65, 71, 149
- Supervisor 84
- Supervisor Assistance 85
- Supervisor Emergency 85
- Switch 85
- System 19
- System language 165
- System name 66

T

- Tab 21
- Tag list 19
- Task flow processing 103, 108, 115, 123, 124, 166
- Task flow set 55, 87, 178
- Task report 188
- Task Report 19
- Task server 137
- Task tag 178
- Task type 17, 27, 56, 67, 123
- Taskflow Editor 22, 87, 103
- Team 17, 18, 82, 96
- Team members 97
- Telephone 17, 20, 126, 149
- Telephone default settings 20
- Telephone settings 196
- Telephony 17, 21
- Telephony name 71
- Terminal server 128
- Terminal workplace 127
- Text number 101
- Textblock administrator 80
- TH13 40, 59
- Ticket ID 32, 200
- Time off 19, 166
- Time to accept 31
- Title 68
- TM13 40
- Tool bar 18

- Topic 16, 18, 25
- TS13 40
- TSF 98

U

- UI config 80
- UMR 80
- UMR Administrator 80
- UMR Domain 200
- UMR Supervisor 81
- Update interval 174
- Urgent information 59
- Use area code 145

V

- Variables 19, 27, 56, 69, 83, 177
- VDN 28
- Vectors 47
- Version 132
- View agent queue 81
- VIP topic 29
- Virtual 21
- Virtual agent group 16, 52, 54, 56, 63
- Voice mails** 109, 112
- Voice unit 17, 19, 82, 108
- VU 48, 83, 108, 111, 177

W

- Wait time threshold 98
- Wallboard 88
- WAV formats 101
- Welcome announcement 105
- Windows 20
- Workplace 17, 19, 126