Using Avaya IP Office Contact Center for Windows

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Security Vulnerabilities

Information about Avaya's security support policies can be found in the Security Policies and Support section of https://support.avaya.com/security.

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Contents

Chapter 1: Introduction

Purpose

This document contains all necessary information and prerequisites on how to use the IP Office Contact Center User Interface for Windows application. This document also enables you to configure and manage different areas and modules of the IP Office Contact Center User Interface for Windows application based on your needs.

Intended audience

This document is intended for people who work with the IP Office Contact Center User Interface for Windows application and want to learn about the features of the user interface.

Related resources

Documentation

See the following related documents at the Avaya Support website at http://support.avaya.com.

Note:

Some documents on the Avaya Support website are restricted, and might not be available to all users.

Document title	Use this document to:	Audience
Overview		
Avaya IP Office Contact Center Feature Description	Understand IP Office Contact Center features and capabilities.	All users
Avaya IP Office Contact Center Documentation Catalog	Understand the structure of IP Office Contact Center documentation, and determine which document you should	All users

Table continues…

Document title	Use this document to:	Audience
	reference to obtain information on a specific topic.	
Planning		
Avaya IP Office Contact Center Reference Configuration	Understand IP Office Contact Center deployment topologies, network architecture, system capacities, product interoperability, and functional limitations of specific configurations.	• Sales and support personnel • Architects • Implementation engineers
Deploying		
Avaya IP Office Contact Center Installation	Install IP Office Contact Center software.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Telephony User Interface Configuration	Configure IP Office Contact Center telephony.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Contact Recorder Configuration	Configure interoperability between IP Office Contact Center and Avaya Contact Recorder.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Dialer	Configure IP Office Contact Center dialer functionality.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Task Flow Editor Telephony	Configure the Task Flow Editor module for IP Office Contact Center telephony.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center IVR Scenarios	Configure the IVR Editor module. This document also describes IVR editor script options and how to configure each option.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Email and Chat Services	Configure email and chat services. You must complete this configuration before you can use email and IM functionality on the IP Office Contact Center user interface.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Reporting	Configure the IP Office Contact Center Reporting module.	• Support personnel • Implementation engineers
Administering		
Using Avaya IP Office Contact Center Web Administration Portal Quick Start	Use the web-based administration portal to set up and administer IP Office Contact Center.	• Support personnel • Administrators
Avaya IP Office Contact Center Task Tag Reference	Understand task tags and their meanings.	• Support personnel • Implementation engineers
Avaya IP Office Contact Center Statistics Counter Reference	Understand the statistics counters.	• Support personnel • Implementation engineers

Table continues…

Document title	Use this document to:	Audience
Administering Avaya IP Office Contact Center Configuration Module	Perform administration tasks on the Configuration module. With the Configuration module, you can update information for agents, teams, announcements, voice units, customers, destinations, and devices in the IP Office Contact Center interface. You can also assign privileges to agents and agent groups. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Dialer	Administer and use the Dialer module in the IP Office Contact Center interface. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Task Flow Editor	Create and edit task flow editor scripts. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center IVR Editor	Create and edit IVR editor scripts. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Text Blocks	Create, edit, and administer text blocks for the IP Office Contact Center email feature. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Address Book	Administer address books in the IP Office Contact Center interface. The address book feature simplifies agent tasks such as making calls and sending emails.	Administrators

Table continues…

Document title	Use this document to:	Audience
	Note: This document is also available as a help system through the product interface.	
Supporting		
Avaya IP Office Contact Center Maintenance	Perform maintenance and upgrade tasks.	• Support personnel • Implementation engineers • Administrators
Avaya IP Office Contact Center Error Reference	Understand error codes and their meanings.	• Support personnel • Implementation engineers • Administrators
Using		
Using Avaya IP Office Contact Center for Windows	Use the IP Office Contact Center User Interface for Windows. **Note:** This document is also available as a help system through the product interface.	All interface users, including agents, supervisors, and administrators.
Using Avaya Agent for Chrome on IP Office Contact Center	Use the Avaya Agent for Chrome – IP Office Contact Center User Interface.	Agents and supervisors.
Using Avaya IP Office Contact Center Wallboard	Use Wallboard functionality.	All interface users, including agents, supervisors, and administrators.

Related links

Finding documents on the Avaya Support website on page 17

Finding documents on the Avaya Support website

About this task

Use this procedure to find product documentation on the Avaya Support website.

Procedure

1. Use a browser to navigate to the Avaya Support website at http://support.avaya.com/.
2. At the top of the screen, enter your username and password and click **Login**.
3. Click **Documents**.
4. In the **Enter Your Product Here** search box, type the product name and then select the product from the drop-down list.
5. If there is more than one release, select the appropriate release number from the **Choose Release** drop-down list.

6. Use the **Content Type** filter on the left to select the type of document you are looking for, or click **Select All** to see a list of all available documents.

   For example, if you are looking for user guides, select **User Guides** in the **Content Type** filter. Only documents in the selected category will appear in the list of documents.

7. Click **Enter**.

Related links

Documentation on page 14

Training

You can access training courses and credentials at http://www.avaya-learning.com. To search for a course, after logging in to the website, enter the course code or the course title in the **Search** field and press **Enter** or click **>**.

The following table lists key IP Office Contact Center courses and certification credentials.

Course code	Course title
ASPS-5001	ASPS — IP Office Contact Center credential
AIPS-4000	AIPS — IP Office credential
ACSS-3000	ACSS — SME Communications credential
8S00010E	Knowledge Access: ASPS - IP Office Contact Center
5001	IP Office Contact Center Implementation and Maintenance Test
0S00100E	Knowledge Access: IP Office Contact Center Administration
0S00100E_INTRO	Knowledge Access: IP Office Contact Center — Administration — Introductory Session
0S00100E_LAB	Knowledge Access: IP Office Contact Center — Administration — Practise Lab Workshop
8S00010V	Fast Track: IP Office Contact Center Virtual Instructor Led

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

Procedure

- To find videos on the Avaya Support website, go to http://support.avaya.com and perform one of the following actions:
  - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.
  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and perform one of the following actions:
  - Enter a key word or key words in the Search Channel to search for a specific product or topic.
  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

Note:

Videos are not available for all products.

Support

Go to the Avaya Support website at http://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Related links

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Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a Web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips
- Information about service packs
- Access to customer and technical documentation
- Information about training and certification programs
- Links to other pertinent information

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base at no extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base to look up potential solutions to problems.

1. Go to http://www.avaya.com/support.
2. Log on to the Avaya website with a valid Avaya User ID and password.

   The Support page appears.
3. Enter the product in **The InSite Knowledge Base** text box.
4. Click the red arrow to obtain the Search Results.
5. Select relevant articles.

Related links

Support on page 19

Chapter 2: IP Office Contact Center User Interface for Windows overview

You can configure the IP Office Contact Center User Interface for Windows application display based on the requirements of your work. You can customize the display by arranging available elements on the interface enabling you to access necessary functions quickly.

Supervisors configure access to applications for agents based on privileges. Supervisors and Agents can also be granted privileges to configure functions of an application. If elements of the IP Office Contact Center User Interface for Windows application are inactive or unavailable, you do not have the privileges for that function.

The IP Office Contact Center User Interface for Windows application is the switchboard for all actions in the IP Office Contact Center system. All other modules required for an IP Office Contact Center system are integrated into this application.

The users of IP Office Contact Center User Interface for Windows application are:

- Agent: An agent works in the customer service area. The agent can make and answer both calls and emails. They also have access to other features, such as chat if configured.
- Supervisor: A supervisor works in the supervision area. The supervisor monitors and supervises the agents. The supervisor can customize the different real time information types and create statistics.
- Administrator: An administrator works in the administration area. The administrator configures various modules of the IP Office Contact Center User Interface for Windows application.

The functions of the users are as follows:

Customer service modules	**Supervisor modules**	**Administration modules**
• Home • Telephony • Email • Chat	• Realtime information • Reporting • Agent Status Reports • Contact Detail Reports	• Configuration • UI config • Task Flow Editor • Dialer • Error list • Email configuration • Textblock administration • Address book administration

Related links

[Starting IP Office Contact Center User Interface for Windows] on page 22
[Agent groups and profiles] on page 29
[Break] on page 31

Starting IP Office Contact Center User Interface for Windows

About this task

The IP Office Contact Center User Interface for Windows application can be configured to log in automatically with your Windows user account. If you configure single sign on, the application does not display a login screen. You must be logged in to Windows as the corresponding user. You cannot use a function if you do not have the necessary privilege.

Before you begin

- Get the IP Office Contact Center server configured by the system manager.
- Get the appropriate connection setting to install the IP Office Contact Center.
- Get the appropriate privileges.
- Get the user name and the password provided by the system administrator.
- Select a terminal when logging in.

Procedure

1. On the Windows menu or Windows desktop, click **Start**.
2. On the login screen:
   a. In the **Username** field, enter the agent, supervisor, or administrator user name.
   b. In the **Password** field, enter the password.
   c. **(Optional)** If you are logging in as an agent, in the **Telephone Extension** field, type the telephone extension number.

      The system displays the User Interface screen.

Related links

[IP Office Contact Center User Interface for Windows overview] on page 21
[Logging out and quitting the application] on page 22

Logging out and quitting the application

About this task

You cannot log out during a call. To end your work you must log out and then quit the IP Office Contact Center User Interface for Windows application.

Before you begin

Log in to the application.

Procedure

1. On the status bar, click the drop down arrow .
2. Click **Logout**.
3. Click **OK**.

   The system displays the login screen.
4. To quit the application, do the following:
   a. On the **File** menu, click **Exit**
   b. Click **OK**.

Related links

Starting IP Office Contact Center User Interface for Windows on page 22

Passwords and aliases

Changing passwords

About this task

Passwords can consist of 1 to 10 alphanumeric characters.

Your password must consist of minimum 8 characters. You can use the following types of characters in the password:

- Lower case letters
- Upper case letters
- Numbers
- Special characters

Before you begin

Ensure you have the required privileges to change passwords.

Procedure

1. On the menu bar, click **File** > **Change password**.
2. In the Change Password window, provide information in the following fields:
   a. **Old password**
   b. **New password**

c. **Confirmation**

3. Click **OK**.

Changing alias

About this task

Your alias is used for anonymous statistics.

Before you begin

Ensure you have the required privileges to change alias.

Procedure

1. On the menu bar, click **File** > **Change alias**.
2. In the Change Alias window, type your new alias.
3. Click **OK**.

Structure of IP Office Contact Center User Interface for Windows

When you start IP Office Contact Center User Interface for Windows for the first time, you can see the following elements:

- The menu bar
- The work area
- The task bar

Menu bar

You can select a component from the menu bar or press the **F10** or **Alt** key and use the cursor to navigate.

Name	Description
File	The options are: • **Change password** • **Change alias** • **Exit**

Table continues…

Name	Description
Go to	The options are: • **Home**: Displays the home area. • **Telephony**: Displays the telephony area. • **Realtime information**: Displays the real time information area. • **Reporting**: Displays the reporting area. • **Agent Status Reports**: Displays the agent evaluation area. • **Contact Detail Reports**: Displays the contact evaluation area. • **Error list**: Displays the date time, code, and the error description. • **Configuration**: Displays the standalone Configuration module. • **UI Config**: Displays the UI configuration area. • **Task Flow Editor**: Displays the standalone Task flow editor module • **IVR Editor**: Displays the standalone IVR editor module. • **Dialer**: Displays the standalone Dialer module. • **Email Configuration**: Displays the Email administration module. • **Text Block Administration**: Displays the Text block administration module. • **Address Book Administration**: Displays the Address book configuration module.
Help	The options are: • **Contents**: Displays the online help content. • **Information**: Displays the information of IP Office Contact Center User Interface for Windows application.

Menu bar status information and messages

In addition to the command menus, the menu bar displays the following information:

- The time that the agent logs in.
- The time that the agent is in break.
- The status of the logged in agent for Telephony, Email, and Chat.
- The name of the logged in agent and the configured telephone extension.
- Information messages.

Status indicators of modules and agent breaks

Icon	Status indicator	Description
	Red circle with an x	No connection to the task server.

Table continues…

Icon	Status indicator	Description
	Gray circle with an x	Not logged in.
	Yellow circle	Logged in but not signed in to any agent group.
	Green circle	Logged in but not signed in to all agent groups.
	Green circle with check mark	Logged in and signed in to all agent groups.
	Gray cup	Logged in and a break is prepared.
	Red cup	Logged in but on a break.

Depending on the agent status, you can use the following functions:

- Sign in to an agent group.
- Sign off an agent group.
- Sign in to all agent groups.
- Sign off of all agent groups.
- Log in to a task type, such as chat.
- Log out of a task type, such as email.

Information messages

The information icon in the menu bar displays messages if you minimize the view.

Icon	Name	Description
	Gray	Specifies that you have no messages.
	Flashing orange	Specifies that you have unread messages.
	Orange	Specifies that you have messages. The system displays unread messages in bold and read messages in default font. If you click a message, the system marks the message as read.

Connection messages

The system displays a message when a connection to the PBX or email system is interrupted. You can view the messages in the Error list module.

Message	Description
`The connection to the telephone system is interrupted.`	Specifies that the connection to the telephone system is interrupted, for example, when there are network problems. The message disappears when the connection is restored.
`The connection to the email system is interrupted.`	Specifies that the connection to the email server is interrupted, for example, when there are network problems. The message disappears when the connection is restored.

Real time information messages

If a real time information element exceeds the configured alarm threshold, the system displays an information message. You can view the messages in the Realtime information module.

Message	Description
Realtime information `Name` Page: `Page number`	Specifies that a value has reached or exceeded the configured alarm threshold. The message disappears when the alarm status changes.

Telephony messages

When you log out of the telephony module, the system displays a message that indicates the reason for log out. Depending on the reason, you might be prompted to log in again.

If the task server restarts, you get logged out and you must log in again. You cannot log in, for example, if you are logged out remotely or if you are logged in to another computer. In these cases, the system does not provide the option to log in again.

Message	Description
`Connection to PBX is broken. Click here to log in again.`	The connection to the telephone system is interrupted.
`Connection to the PBX is established again. Click here to log in again.`	The connection to the telephone system is established.
`You have been logged out from the telephone, another user has logged in.`	Another user is logged in.
`Telephony function "Call routing" is active. Click on here to deactivate it and log in again.`	You are logged out, because call routing is set up on the telephone in use.
`Telephone function "do not disturb" is active. Click on the button to deactivate it and login again.`	The do not disturb function is activated on the telephone.

Work area

The work area displays the open modules.

Task bar

The task bar displays icons for the modules available to agents, supervisors, and administrators.

Agent task bar

Icon	Name	Description
	Home	Displays additional information for an agent.
	Telephony	Displays the telephony area.
	Email	Displays the email area.
	Chat	Displays the chat area.

Supervisor task bar

Icon	Name	Description
	Realtime information	Displays real time information area.
	Reporting	Evaluates statistical data that is counter-based.
	Agent Status Reports	Evaluates agent statistical data. The telephony or email-based data is not evaluated.
	Contact Detail Reports	Evaluates contact-related statistical data for individual contacts.
	Error list	Displays application messages and errors.

Administrator task bar

Icon	Name	Description
	Configuration	Configures objects in the IP Office Contact Center system.
	UI Configuration	Configures elements and areas in the user interface.
	Task Flow Editor	Creates call flow sets and email flow sets.
	IVR Editor	Creates IVR scripts.
	Dialer	Creates campaigns and jobs.
	Email Configuration	Configures the email system.
	Text Block Administration	Creates text blocks.
	Address Book Administration	Configures address books.

Accessing help files

About this task

Use this procedure to access help files and other help systems.

Procedure

Do one of the following:

- On the menu bar, click **Help** > **Contents**.
- On the keyboard, press **F1** .

Performing a search

Procedure

1. On the **Help** menu, click **Contents**.
2. In the Online help dialog box, click the **Search** tab.
3. Type in the key word to find the search entry, and click **List Topics** or press `Enter`.
4. To display the selected topics, in the Select Topics to display dialog box, select a topic and click **Display**.

Agent groups and profiles

Agent groups

If you have the Automatic login privileges configured, the system automatically logs in to the agent groups assigned to you. If this privilege is not set up, you must log in manually. You can create different profiles for logging in to agent groups.

Profiles

You can use the profiles to select specific agent groups to keep from always having to select the same agent groups. For example, you can have a profile for working during the day and another for the night shift. You can create any number of profiles. When naming a profile, select a name that indicates the purpose of the profile.

Agent group selection icons

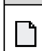
Icon	Name	Description
	**Save**	Saves the current settings in a profile.
	**Delete**	Deletes the current profile.
	**Telephony**	Displays the agent groups to log in to the Telephony work area. You must select the appropriate check boxes.

Table continues…

Icon	Name	Description
	Email	Displays the agent groups to log in to the Email work area. You must select the appropriate check boxes.
	Chat	Displays the agent groups to log in to the Chat work area. You must select the appropriate check boxes.

Related links

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Logging out of agent groups on page 30
Creating profiles on page 31
Deleting profiles on page 31

Logging in to agent groups

Procedure

1. On the status bar, click the drop down arrow and click **Select AG**.
2. In the Agent group selection dialog box, do one of the following:
    - To select an agent group, select the appropriate check box.
    - To select multiple agent groups, drag the mouse over multiple entries.
    - To select all the agent groups, in the work area, click the **Telephony** icon .
3. In the drop-down box, select a profile.
4. Click **OK**.

    The system displays that you are logged in to the selected agent groups.

Related links

Agent groups and profiles on page 29

Logging out of agent groups

About this task

Agents and administrators do not have the privileges of deleting agent groups.

Procedure

1. On the status bar, click the drop down arrow and click **Select AG**.
2. In the Agent group selection dialog box, do one of the following:
    - Clear the check box of the appropriate agent groups.
    - To clear all the agent groups, in the work area, click the **Telephony** icon .

3. Click **OK**.

   The system displays that you are logged out of the selected agent groups.

Related links

[Agent groups and profiles](#) on page 29

Creating profiles

Procedure

1. On the status bar, click the drop down arrow ▾ and click **Select AG**.
2. In the Agent group selection dialog box, select the required agent groups.
3. Click **Save**.
4. In the Save configuration dialog box, type a name for the configuration profile and click **OK**.
5. Click **OK**.

Related links

[Agent groups and profiles](#) on page 29

Deleting profiles

Procedure

1. On the status bar, click the drop down arrow ▾ and click **Select AG**.
2. In the Agent group selection dialog box, select a profile.
3. Click **Delete**.
4. Click **OK**.

Related links

[Agent groups and profiles](#) on page 29

Break

You can stop working with the IP Office Contact Center system to take a break. The system notifies the supervisors of your break status. When you take a break, you do not receive any new calls through call distribution.

The **Active** or **On Break** status for the Telephony or Email task types is displayed individually for each task type in the Break window. You can start or end a break for both task types at the same time.

You can configure a sign-off prevention quota for an agent group. The sign-off prevention quota defines the number of agents that must remain signed on to the agent group and the number of agents that cannot sign out or take a break.

If the sign-off prevention quota is reached, the IP Office Contact Center system denies your break. The break function depends on the task type. For example, you can start a break for the Email task, but not for Telephony. You receive a message to this effect and can try again later to start a break for the Telephony task type. You can take a break after wrap-up time by clicking on the break icon and selecting **Break time**.

Related links

IP Office Contact Center User Interface for Windows overview on page 21
Starting a break on page 32
Ending a break on page 32

Starting a break

About this task

You can take a break if you are in wrap-up time or later. The system activates the On Break status immediately. If break codes are defined in the Configuration module, the system displays a list of break codes in the Break Time dialog box. The break types are:

- Lunch
- Meeting
- New break
- Recess

Procedure

1. On the status bar, click the drop down arrow and click **Break Time**.
2. In the Break Time dialog box, select the break type and click **Break Time**.

   The system indicates that the break is started and displays a red coffee cup on the status bar.

Related links

Break on page 31

Ending a break

Procedure

1. On the status bar, click the drop down arrow and click **Break Time**.
2. In the Break Time dialog box, click **Off Break Time**.

   The system displays that the break is over.

Related links

Break on page 31

Part 1: Customer service

Chapter 3: Realtime information display for the Home and Telephony modules

Real time information display operates in the same manner in both the Home and Telephony modules. The descriptions and procedures in this section apply to both modules.

The Home and Telephony modules display information about the status of objects in the IP Office Contact Center system. Some object states can be monitored in real time, while others are updated periodically. If you have the appropriate privileges, you can edit the objects in the display.

When you have the base module privilege setting of **Select own home file** or **Select own telephony file**, you can select a home or telephony file to display. The preconfigured file contains real time information objects that provide system status information. When you have the higher level privilege of **Home configuration** or **Telephony configuration**, you can configure the real time information objects.

Home and Telephony menu bar options

Name	Required privilege	Description
Select home file **Select telephony file**	Select own home file Select own telephony file	Displays the option to select a home or telephony file.
File View	Home configuration Telephony configuration	Displays folders and files containing configured real time information.
Inspector	Home configuration Telephony configuration	Creates and edits real time information.
Preview	Home configuration Telephony configuration	Previews the real time information configuration.
Default View	Home configuration Telephony configuration	Displays the real time information configured for the currently selected file.

Related links

File View on page 115
Viewer on page 118
Inspector on page 119

Selecting real time information display

Procedure

1. On the **Go to** menu, select **Home** or **Telephony**.
2. Depending on the module you choose, do one of the following:
   - On the menu bar, click **Home** > **Select Home file**.
   - On the menu bar, click **Telephony** > **Select Telephony file**.
3. In the **File Selection** window, select a folder and then select a file.
4. Click **Edit**.

   The system displays the real time information configuration in the work area.

Managing real time information folders and files

About this task

You can use this procedure to view the real time information in the **File View**, **Preview**, **Inspector**, and **Default** views.

Procedure

1. On the **Go to** menu, select **Home** or **Telephony**.
2. Depending on the module you choose, do one of the following:
   - On the menu bar, click **Home** > **File View**.
   - On the menu bar, click **Telephony** > **File View**.
3. In the **File View** dialog box, in the **Folder** area, click a folder.

   The system displays the selected folder in the **Home Files** or **Telephony files** field.
4. Click a file, and click **Preview**.
5. In the **Preview** window, click **Edit**.

   The system displays the real time configuration in the **Inspector** view. For predefined files, the **Edit** icon is inactive. To modify a default file, you must first create a copy of the file and then click **Edit**.
6. **(Optional)** To view the home page, select **Default View**.

   The system displays the real time information configuration work area for the currently selected file.

Configuring the real time information work area

Procedure

1. In the Home or Telephony module, open a real time configuration file in the **Inspector** view.

   The system displays the **Work Area** pane on the right of the user interface.
2. Right-click the work area, and select **Properties**.
3. In the Properties window, click the **General** tab and do the following:
   a. To edit the name of the real time configuration file, click the **Name** field.

      The **Name** field can contain up to 29 alphanumeric characters.
   b. To configure the **Size of the work area** field, type **Width** and **Height** values.

      The range for **Width** and **Height** is from 160 to 3000 points.
4. Click the **Settings** tab, and do the following:
   a. Type a name in **Page name**.
   b. To display a grid in the work area, select the **Grid** check box.
   c. **(Optional)** If you have enabled a grid, enter values for the grid **Width** and **Height**.

      The range for the grid **Width** and **Height** is from 2 to 50 points and determines the spacing of the grid. For example, if you enter a value of 2 for the grid width or the height, a grid point is placed every 2 points.
5. Click the **Presentation** tab, and do the following:
   a. In the **Font** area, configure the font display.
   b. In the **Line** area, configure the line width and the color.
   c. In the **Background** area, you can select a background color or choose a background image.
6. Click **OK**.
7. **(Optional)** To add multiple pages to the work area, at the bottom of the work area, right-click the page tab and select **Add page**.

   If required, configure the properties for the new page.

Configuring real time information elements

Procedure

1. In the Home or Telephony module, open a real time configuration file in the **Inspector** view.
2. From the list of elements on the left, click and drag an element to the work area.
3. After you have positioned the element, release the mouse button.

The system displays the Properties dialog box for the elements.

4. Configure the properties for the element.

Assigning a real time information configuration to an agent

About this task

You can assign a real time information configuration file to yourself and to other agents.

Before you begin

Get the Telephony configuration privileges.

Procedure

1. In the **Go to** menu bar, click **UI Config**.
2. In **UI Configuration**, click **Agent**.
3. In the agent list on the right, double click an agent.
4. In the UI configuration for the agent <name> window, click the **Home** or **Telephony** tab.
5. Clear the **Default** check box to enable file selection.
6. Click browse icon .

   The system displays the File selection dialog box.
7. Select a folder and then a real time information configuration file.
8. Click **Select**.

   The system displays the selected file in the **Current Telephony file** field.

Chapter 4: Telephony contact bar

The Telephony module contact bar contains a contact information area and a function bar. The contact information area displays text-based call details. The function bar contains icons that can be clicked to execute telephony commands. If you have the appropriate privileges, you can modify the icons displayed in the function bar.

Contact information area

The contact information area displays the following call information with one line for each call.

- Message text.
- Call direction, inbound or outbound.
- Call status. For example, dialing, busy, or on hold.
- Topic name.
- Conversation length.
- The remaining time if Wrap Up is configured.

  If time is activated manually, 12:00:00 a.m. is displayed because the time is not limited. In this case, the wrap-up time must also be closed again manually.
- The name of the customer, if known, or the telephone number.

Related links

Call Center call on page 40
Contact bar icon descriptions on page 40
Configuring the contact bar in Telephony on page 42
Assigning a contact bar configuration to an agent on page 42
Answering a call on page 43
Ending a call on page 43
Calling a subscriber on page 44
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Making consultation calls on page 45
Toggling between calls on page 46
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Qualifying a call when a fax machine is reached on page 55
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Call Center call

With the IP Office Contact Center User Interface for Windows application, you can dial a number or answer a call. You can log in to specific agent groups automatically or manually. A subscriber calls a topic number. The IP Office Contact Center system distributes the call to an available agent. The system administrator determines the criteria of how to distribute the call within the IP Office Contact Center.

Related links

Telephony contact bar on page 39

Contact bar icon descriptions

The **Contact bar** displays the following telephone elements:

Icon	Name	Description
	**Answer**	Answers the current call.
	**Dial**	Starts the dial sequence.
	**Hang up**	Ends the call or process.
	**Consultation**	Puts the current call on hold to perform a consultation.
	**Hold**	Puts the current call on hold.
	**Toggle**	Toggles between two subscribers.
	**Conference**	Connects several subscribers in a conference.
	**Transfer**	Transfers a connection to another subscriber.
	**DTMF**	Opens a keypad to type DTMF signals.

Table continues…

Icon	Name	Description
	Extend Wrap Up	Extends the wrap up time for a call after the end of the call.
	End Wrap Up	Ends wrap up for a conversation.
	Job Code	Enters a job code.
	Emergency	Enables the agent to request assistance from the supervisor.
	Silent Monitoring	Enables the supervisor to monitor the active conversation of an agent.
	RPC	Specifies that the call was successful and you spoke with the correct party.
	Closure	Specifies that the call was unsuccessful as you did not call the correct party. For example, if you dial a wrong phone or fax number, or the party is unavailable.
	Fax	Specifies that you called a fax machine. The system disconnects the call immediately and evaluates as a closure.
	Record call	Records a conversation. You must configure a topic or an external destination for the call recording.
	Call recording pause	Pauses the call recording.
	Topic Selection	Specifies that you can select a topic. The topic must be configured accordingly.
	Choose external destination	Specifies that you can select an external destination. The external destination must be configured accordingly.
	Delete	Deletes the mapping.
	Separator	Displays a line to separate buttons.

You can use the following functions:

Name	Description
Available elements	Displays the available telephony elements.
Selected elements	Displays the selected telephony elements.
Call recording on: (element: recording)	Configures a topic or an external destination for the element recording. You can also delete the mapping.
Show only authorized topics (element: Call)	Displays only authorized topics for element calling.
Compressed view	Displays all information about a call in a single line. The call information lines are arranged one after the other.

You can use the following buttons on the **Contact bar**:

Name	Description
Up	Moves the selected element up in the list.
Add	Adds the selected element to the **Selected elements** list from the **Available elements** list.
Remove	Removes the selected element from the **Selected elements** list.
Down	Moves the selected element down the list.

Related links

Telephony contact bar on page 39

Configuring the contact bar in Telephony

Procedure

1. On the **UI configuration** tab, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. In the **UI configuration** dialog box, in the **Contact bar** > **Available elements** field, select the required elements and click **Add**.

   The system adds the selected elements to the **Selected elements** field.
4. Click **OK**.

Related links

Telephony contact bar on page 39

Assigning a contact bar configuration to an agent

Procedure

1. On **Go to** menu, click **UI Config**.
2. On the UI Configuration tab, click **Agent**.
3. In the agent list on the right, double-click an agent.
4. In the UI configuration window, click the **Contact bar** tab.
5. Clear the **Default** check box.

6. Do one of the following:
    - To add an icon to the contact bar, select the icon in the **Available elements** list and then click **Add**.
    - To remove an icon from the contact bar, select the icon in the **Selected elements** list and click **Remove**.
7. To position the icons on the contact bar, select **Up** or **Down**.
8. To add the Record call icon to the contact bar, in the **Call recording on (element: recording)** field, do the following;
    a. Select a topic, in the **Topic selection** field.
    b. Choose an external destination, in the **Choose external destination** field.

Related links

Telephony contact bar on page 39

Answering a call

About this task

The **Answer** icon on the contact bar indicates an incoming call. If you do not answer the call within the configured time, the system automatically logs you out of all agent groups. The contact bar displays the time in seconds when you are logged out.

Before you begin

Log in to the application.

Procedure

To answer a call, click **Answer**.

The system connects the call to the caller, and you can conduct your conversation.

Related links

Telephony contact bar on page 39

Ending a call

Procedure

Click **Hang up**.

The system disconnects the call. If configured, you are assigned Wrap Up.

Related links

Telephony contact bar on page 39

Calling a subscriber

About this task

If you are dialing using a number box, you must type the number using your keyboard.

Before you begin

- Log in to the application.
- Configure the Dial function key on the contact bar.

Procedure

1. Click the **Dial** button.
2. In the Dial dialog box, do one of the following:
   - Type a number in the **Number** selection box.
   - Choose a number from the selection box or from the telephone book.
3. Click **Dial**.

   The system starts the dial sequence and displays the call status as **Avail**.

Related links

Telephony contact bar on page 39
Using the Telephone book on page 51

Starting a call

About this task

You can mark a call as a call center-specific call and select a topic for the call. The call for the selected topic is listed as a call-center call in the report. The counter names contain `outcc`.

Outgoing call center calls work only for external target subscribers. The system administrator defines the access code dialed for the call in the Configuration module in the PBX configuration using **Access code for external OutCC**.

Before you begin

Log in to the application.

Procedure

1. On the contact bar, click **Dial**.
2. In the Dial window, do one of the following:
   - Type a number in the **Number** selection box.
   - Select a number from the selection box or the telephone book.

3. To mark the call as a call center-specific call, do the following:
    a. Select **Outgoing ACD call**.
    b. Select **Intern** for a subscriber within the PBX or **Extern** for a subscriber outside the PBX.
    c. Select a topic.
4. To start the dial sequence, click **Dial**.

Related links

Telephony contact bar on page 39
Using the Telephone book on page 51

Redialing the last number

About this task

You can redial a number anytime.

Before you begin

Get the administrator to configure the dial function key on the contact bar.

Procedure

1. On the contact bar, click **Dial**.
2. In the Dial window, click the arrow of the selection box.

    The system displays the last 10 numbers dialed.
3. Click the last dialed number.
4. To start the dial sequence, click **Dial**.

Related links

Telephony contact bar on page 39

Making consultation calls

About this task

While on a call, you can start a second call for a consultation.

Before you begin

An active call must be in progress.

Procedure

1. During a conversation, on the contact bar, click **Consultation**.

   The system puts the first party on hold.
2. In the Consultation window, do one of the following:
   - Type a number in the **Number** selection box.
   - Select a number from the selection box or the telephone book.
3. Click **Dial**.

   The system establishes a two-party call with the agent.
4. When the consultation session is complete, do the following:
   a. To drop one of the parties from the conference call, click **Hang up** next to the number that you want to drop.
   b. To retrieve the call, click **Hold**.

Related links

[Telephony contact bar](#) on page 39
[Using the Telephone book](#) on page 51

Toggling between calls

Before you begin

An active call must be in progress.

Procedure

1. On the contact bar, click **Consultation**.
2. In the Consultation window, do one of the following:
   - Type a number in the **Number** selection box.
   - Select a number from the selection box or the telephone book.
3. Click **Dial**.

   The system establishes a two-party call with the agent.
4. To return to the original call, click **Toggle** on the contact bar.

   The system puts the third party in the consultation call on hold.
5. To continue to toggle between calls, do one of the following:
   - Click **Hold** in the contact bar to return to the active call on hold.
   - In the contact information area, click the line item for the active call on hold.
6. To end your current call, click **Hang up**.

The system disconnects the current call and the other two parties remain connected.

Related links

Telephony contact bar on page 39
Using the Telephone book on page 51

Starting a conference call

Before you begin

An active call must be in progress.

Procedure

1. On the contact bar, click **Consultation**.
2. In the Consultation window, do one of the following:
    - Type a number in the **Number** selection box.
    - Select a number from the selection box or the telephone book.

    The system establishes a two-party call with the agent.
3. Click **Dial**.

    The system connects you to the subscriber that you want to engage in a conference.
4. On the contact bar, click **Conference**.

    The system interconnects the two parties and you in a conference.
5. To withdraw from the conference, click **Hang up** on the contact bar.

    The other two parties remain connected.

Related links

Telephony contact bar on page 39
Using the Telephone book on page 51

Transferring a call

About this task

Use this procedure to transfer a call when you are connected to a caller who wants to connect to another extension.

Procedure

1. On the contact bar, click **Consultation**.

2. In the Consultation window, do one of the following:
   - Type a number in the **Number** selection box.
   - Select a number from the selection box or the telephone book.
3. Click **Dial**.

   In the Contact information area dialog box, the system displays whether the extension is free or busy.
4. If the extension is free, do the following:
   a. Tell the caller that you are transferring the call.
   b. Click **Transfer**.

   The system connects the two subscribers in a consultation call.
5. If the extension is busy, do one of the following:
   - Transfer the call, and click **Hang up**.
   - Return to the original caller, and tell the caller that the extension is busy, click **Hold**.

Related links

Telephony contact bar on page 39
Using the Telephone book on page 51

Putting a call on hold

Before you begin

Start a call.

Procedure

1. On the contact bar, click **Hold**.

   The system turns the **Hold** icon to green.
2. To return to the call, click **Hold** again.

Related links

Telephony contact bar on page 39

Requesting support

Before you begin

Start a call.

About this task

An agent can request supervisor support during a call. The two types of support are:

- Silent monitoring: The supervisor joins the active call and listens to the conversation. The caller and the agent cannot hear the supervisor.
- Active participation in the call or Emergency: The supervisor can cut into the active call and help the agent. The caller can also hear the supervisor.

Procedure

1. On the contact bar, click **Silent monitoring** or **Emergency**.

   The system displays the icon as dimmed. A signal is activated on the supervisor interface.
2. The supervisor cuts into the agents connection.

   The system turns the emergency icon to green.

Related links

Telephony contact bar on page 39

Telephone book overview

You can use a **Telephone book** to find a subscriber in the address book and to call the subscriber. You can use only the configured address books in the **Telephone book**. You can search the Telephone book based on the following criteria:

- Last name
- First name
- Title
- Phone (business)
- City
- Company

When you enter a term in search field, the telephone list displays how many matching data records are found. The telephone list displays maximum 250 records. If the list is more than 250 records, you must narrow down your search. If the database is extensive, the search can take a few seconds.

The detailed view displays the following information from the selected phone book entry when available:

- First name
- Last name
- Title
- Gender
- Street

- Branch
- Post code
- State
- Province
- Country
- Company
- Department
- Business phone
- Home phone
- Mobile phone
- Fax number
- Email address
- Home page

The search is not case sensitive. You can use the following placeholders for phone book searches:

Placeholder	Description	Example	Result
%	Placeholder for any characters.	%en	Searches for all entries containing ‘en’.
_	Placeholder for any character.	_ish	Searches for all entries starting with any character and then containing ‘ish’.
[character]	Placeholder for a certain character.	M[ae][iy]er	Searches for all entries with Maier, Mayer, Meier, or Meyer.
[character - character]	Placeholder for a certain string.	[M-Z]owell	Searches for all entries starting with a letter from M to Z and then containing ‘owell’.
*	Placeholder for any characters.	*	Searches for all entries.

Related links

Telephony contact bar on page 39
Opening the phone book on page 50
Using the Telephone book on page 51

Opening the phone book

Procedure

1. In the contact bar, click **Dial** or **Consultation**.
2. In Telephone book dialog box, select a Telephone book or all address books.

The **Telephone book** dialog box can be displayed in two views: the default view and the detail view.

3. To switch from default view to detail view and back, click **Details**.

Related links

Telephone book overview on page 49

Using the Telephone book

Procedure

1. In the contact bar, click **Dial** or **Consultation**.
2. In the Telephone book dialog box, select a Telephone book or all address books.
3. To view more fields, click **Details**.
4. In the **City** field, type a location.
5. In the **Last name** field, type a name.
6. Select a subscriber entry.

   If the subscriber has more than one phone numbers, then you must dial the number that you want to call.
7. Click **Dial** or **Apply**.

   The system incorporates the number in the Dial or Consultation dialog box.

Related links

Telephone book overview on page 49

Job code overview

You can configure job codes for statistical evaluation of incoming calls. A job code entry is mandatory when configuring the IP Office Contact Center system. You can enter multiple job codes for a call. Job codes can be helpful if a caller orders something and then requires technical support. You can enter a job code during a call or during Wrap Up. When you enter the job code, the system automatically relates the topic to the call. The length of the job code is defined. You cannot specify more characters than the defined number.

If a job code entry is mandatory, an incoming call turns the contact bar **Job code** icon to orange and the **Wrap Up** icon to green. If you disconnect a call before entering a job code, the **Job code** icon remains orange. The contact information line for the call displays **Job code**. If a job code entry is mandatory, you must enter a job code for each call. The system does not assign a new call to you, until you enter a job code.

Related links

Telephony contact bar on page 39

Entering a job code on page 52

Entering a job code

Before you begin

Configure the system for mandatory job code entry.

Procedure

1. During a call or during the wrap-up time, in the contact bar, click **Job code**.
2. In the Job code dialog box, click the right arrow to add the job code to the **Selected list**, and do one of the following:
   - From the list, click **Job code**.
   - In the **Unrestricted entry** field, enter a job code.

   The system displays the selected job code in the list.
3. **(Optional)** From the selected list, click **Remove** to remove the job codes or click **Add** to add additional job codes.
4. To apply the job codes to the selected list, click **Send**.

Related links

Job code overview on page 51

Working with the Wrap Up settings

About this task

After a call ends, the system provides a configured time to do any required post call processing tasks, such as job code entry. The period is referred to as Wrap Up. The system administrator configures the wrap-up time

When you are in the wrap up period for a call, the contact information line for the call displays the remaining wrap-up time. The call status is **End Wrap up**.

Before you begin

You must end a call and be in the Wrap Up period.

Procedure

1. On the contact bar, click **Extend Wrap Up**.

   The system turns the contact bar **Wrap Up** icon to dark green and the Wrap Up time is now unlimited. The contact information line for the call displays the Wrap Up time as 00:00:00.
2. To end the wrap up, click **End Wrap Up**.

The system ends the Wrap Up and displays the icon as unavailable.

Related links

[Telephony contact bar](#) on page 39

Turning on Wrap Up

About this task

Use this procedure to turn on Wrap Up after a call ends, so that you get time for post call processing. You can manually turn on **Wrap Up**.

Procedure

1. On the contact bar, click **Wrap Up**.

   The system turns the **Wrap Up** icon to dark green.

2. After you complete your task, click **End Wrap Up**.

   The system ends the Wrap Up session.

Related links

[Telephony contact bar](#) on page 39

Entering DTMF signals

About this task

Dual-tone multi-frequency dialing (DTMF) can be used for special functions. For example, you can send DTMF signals when connected to a voice mailbox.

Before you begin

Get the DTMF configured on the contact bar.

Procedure

1. On the contact bar, click **DTMF** icon.
2. In the keypad window, click the buttons as required.
3. Click **Close**.

Related links

[Telephony contact bar](#) on page 39

Qualifying a call as correct

About this task

The outbound dialer is the part of the IP Office Contact Center system that starts automatic outbound calls. When working in the outbound dialer, you must qualify calls. Use this procedure when the call is successful, and you reach the correct subscriber.

Procedure

1. On the contact bar, click the **Right Party Contact qualification (RPC)** icon.

   The system evaluates the call as successful. The RPC window displays if the qualifications are configured.

2. Select qualifications on the left and add them to the list on the right.

   The selected values are saved as additional information tags on the CallJob tags.

Related links

Telephony contact bar on page 39

Qualifying a call as incorrect

About this task

Use this procedure when the call is unsuccessful.

Procedure

1. On the contact bar, click the **Closure qualification** icon.
2. In the Closure dialog box, use the available options to qualify a call.
3. To complete the qualification, click **OK**.

Related links

Telephony contact bar on page 39
Closure qualification field descriptions on page 54

Closure qualification field descriptions

When you qualify a call as incorrect, the following options are available:

Name	Description
Reminder	Specifies that the call is repeated at a later time.
Wrong number	Specifies that you dialed the wrong number.

Table continues…

Name	Description
New number	Specifies the field to type a new number in the **Number** box.
AM	Specifies that you reached an answering machine (a.m.). • If you mark a.m. and indicate a time, the system generates a new job. • If you mark a.m. and do not indicate a time, the system closes the job.
Check box	Enables the check box to limit the time during which a new call is made.
Start time	Specifies the start time of a new call.
Stop time	Specifies the stop time of a new call.
Today	Specifies to make a new call today. The call must occur in about 1 hour.
Tomorrow	Specifies to make a new call tomorrow. The call must occur in 24 hours.

Related links

Qualifying a call as incorrect on page 54

Qualifying a call when a fax machine is reached

About this task

Use this procedure when the call reaches a fax machine.

Procedure

On the contact bar, click the **Qualification as fax abandoned** icon .

The system ends the call immediately and evaluates the call as a fax.

Related links

Telephony contact bar on page 39

Quick bar and customer history

The quick bar is an additional display tool for the Telephony, E-mail, and Chat modules. In the E-mail and Chat modules, the quick bar displays the customer history information element. In the Telephony module, the quick bar can display telephony information elements in addition to the customer history element.

The quick bar can be opened and closed using the arrow button in the top left corner. The quick bar has two display modes:

- Mode Overlay: The quick bar content is displayed only when needed. The cursor must remain on the arrow to keep the quick bar open. The quick bar display covers other content in the module.

- Mode Embedded: The quick bar remains open after the arrow is clicked. Other module content is not displayed.

You can use the following Telephony elements in the quick bar :

- Text element
  - Label
  - Value element
  - Longest wait time (topic) [Telephony]
  - Longest wait time (topic) [Email]
  - E-mail to contact
  - Out of office notice
  - Variable
  - Tag
- Lists
  - Queue [Telephony]
  - Abandoned Call list
- Graphics elements
  - Image
  - Group
  - Bar chart
  - Longest wait time (topic) [Telephony]
  - Longest wait time (topic) [Email]
  - Queue (topics) [Telephony]
  - Waiting emails (topics) [Email] (bar chart)
  - Individual status LED
  - Pie chart
  - Agent status (AG)
  - Agent status (team)
  - Phone state
- Other elements
  - Customer history
  - Direct call
  - Internet browser
  - Supervisor Emergency

Related links

[Telephony contact bar] on page 39
[Configuring the quick bar] on page 57
[Customer history] on page 58

Configuring the quick bar

About this task

During installation, the system creates a quick bar file containing a customer history element.

Before you begin

You must have the appropriate privilege that a quick bar displays. The system configures the privileges with the application configuration. To use the quick bar, you must have the following features:

- Show quick bar: When you select this privilege, the system displays the quick bar.
- Select own quick bar: When you select this privilege, an agent can select a Telephony file for the quick bar.
- Telephony configuration: When you select this privilege an agent can configure Telephony.

Procedure

1. On the **UI Configuration** tab, select one of the following:
    - **System**
    - **Profile**
    - **Agent**
2. From the list of configured systems, agents, or profiles in the right pane, double-click an item in the list.
3. In the UI configuration dialog box, click the **Telephony** tab and click the browse icon ....
4. From the **File selection** window, in the **Quick bar files**, click a file.
5. **(Optional)** Right-click the quick bar and click **Configure** > **File selection** > **Quick bar files** .
6. Click a file.
7. Click **Select**.

    You can use the quick bar to either display on demand or use always on top using the overlay or embedded mode.

Related links

[Quick bar and customer history] on page 55

Customer history

If you have a customer contact and data is available for the customer, then the customer history element displays the information. The information displayed depends on the module that you are currently working on. The customer history displays information about the current task, that is, telephone call, email, or chat. The source of the customer history information is the task reporting database. Therefore, the task reporting processes must be running.

The following customer history options are available:

- You can adjust the real time display.
- You can adjust the size.
- You can hide the title.
- You can customize the column arrangement.
- You can modify the properties.
- You can change the background color.

The customer history title bar displays:

- The name of the customer.
- The number of the caller.
- The email address of the sender.

The body of the customer history element displays a column for each type of customer history that is configured. The following information is available in the task reporting database:

Name	Description
Date	Displays the date of the contact.
Time	Displays the time of contact.
Task type	Displays the task type: telephony, email, or chat .
Caller / From	Displays the name of the customer, if configured.
Called address	Displays the dialed number (topic or extension) or the email address (TO).
Original topic	Displays the original topic (first topic).
Last topic	Displays the last topic.
Last agent	Displays the last agent who handled the telephony, email, or chat task.
External target name	Displays the external target name.
External destination : address	Displays the external destination.
Note	Displays a note. A note appears only with a call. The note displays the contents of `CallTag CCK_Customer_Info`. In a pre-defined

Table continues…

Name	Description
	telephony element, the `CallTag` can be set by an agent. In an email, the note is empty.
Subject	Displays the subject of an email. In a call, the subject is empty.
Dialer note	Displays a dialer note. The dialer note displays the contents of `calltag OD_Pers_Note`. In an email, the dialer note is empty.
Address	Displays the call number or email address of the contact.
Initial request	Displays the initial request of a chat customer.

Related links

[Quick bar and customer history](#) on page 55
[Configuring customer history](#) on page 59
[Using customer history](#) on page 59

Configuring customer history

Procedure

1. On **Go to** menu, select **Telephony**.
2. Click **Telephony** and then select **File view**.
3. Click **New quick bar file**.
4. Enter a file name.
5. Click **Edit**.
6. In the Telephony inspector dialog box, select and drag the **Customer history** element into the work area.
7. Choose a period.

   The period that you select determines which contact data is displayed in the customer history. The starting point is always from the current time. If you specify 0, then all existing data is displayed. Using 0 can result in the display of a large amount of data and can cause delays.
8. Choose required tabs.
9. Click **OK**.

Related links

[Customer history](#) on page 58

Using customer history

About this task

You use the customer history feature from a quick bar. You can also use customer history in Telephony. You can get information, for example, the telephony or email contacts of a customer.

To view the name of a caller or sender, the name must be configured as a customer. The system detects the name of a customer when the phone number and email address of the customer are configured. Even if a caller or sender has already called or sent emails before being configured as a customer in customer history, the system still displays the customer contact.

Before you begin

You must have the following IP Office Contact Center processes:

- Taskreporting database server (TRDB_SRV.EXE)
- Taskreporting Server (TR_SRV.EXE)

Note:

For this feature to work optimally, ensure the database is regularly serviced.

Procedure

1. To sort the table by column, click on the column title.

   Customer history is presorted by date. The system displays the latest data at the top.

   The system displays the sorted table with an icon in the column indicating whether the table is sorted in ascending or descending order.

2. To print customer history, right-click **Customer history**.
3. Click **Print**.

   The system displays the option to select a printer and print the contents.

4. To send a new email to the customer, right-click **Customer history**.

   The email address is included in the **To** field.

5. Click **Create Email**.

   The system displays a new email in edit mode.

Related links

Customer history on page 58

Chapter 5: Email module overview

The Email module contact bar contains menu bar and function area to read and process emails assigned to each user and to manage breaks. Agents can log in and log out of IP Office Contact Center or specific agent groups from the Email module user interface. You can access specific functions in the Email module interface, depending on your user privileges.

The following table lists the functions that are available based on each user privilege:

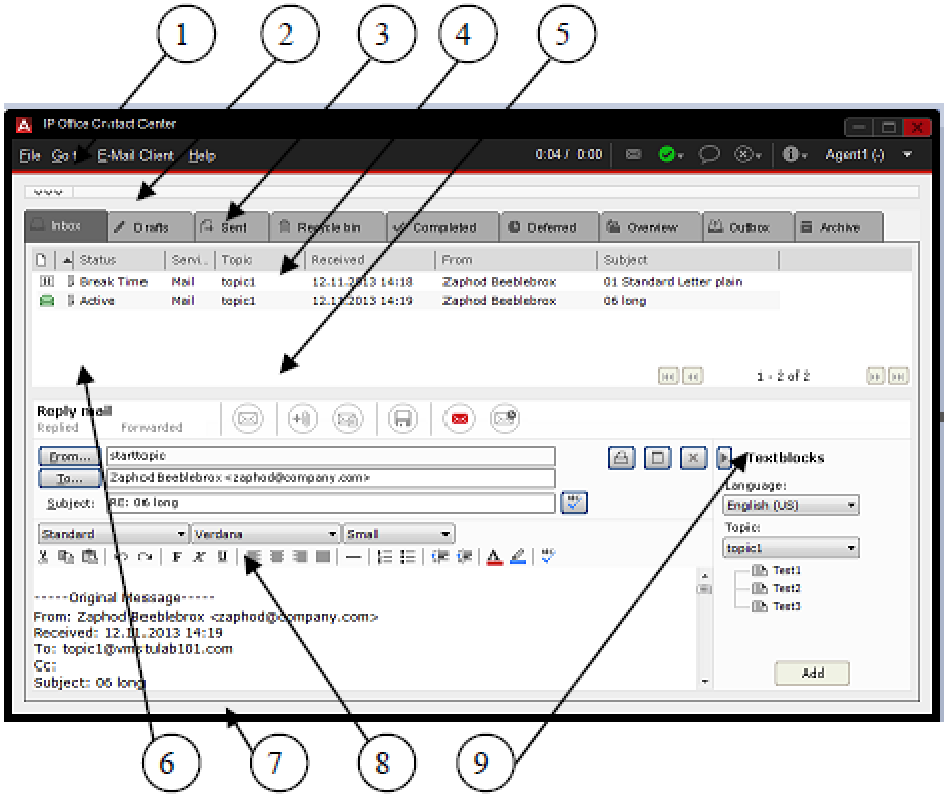
User Privilege	Available features
Agent	• Log in and log out of an agent group. • Start and end breaks. • Accept and process emails. • Delegate or assign emails. • Send, forward, delete, and print emails and perform spell checks. • Display use text blocks. • Display use and import address books.
Supervisor	• Display agent mailboxes. • Delegate, process, and delete documents in the **Overview** folder. • Delegate and delete documents in the **Deleted** folder. • Import and administer dictionaries.
Generic	• Display emails by status: Active, Interrupted, Held, and Completed. • Modify email display formats: ASCII, HTML, and RTF. • Display drafts and stored emails.

Related links

Email module screen on page 62
Opening the Email module on page 76
Using Email menu bar commands on page 76
Email privileges on page 77
Viewing documents in mailbox folders on page 90
Paging through mailbox folders on page 90
Using search filters on page 91
Activating documents on page 92
Viewing the document process and transmission status on page 93

Email module screen

The following illustration displays the Emailmodule user interface and the various areas on the screen.



No.	Name	Description
1	Menu bar	Displays the File, Go to, Email Client, and Help tabs.
2	Toolbar and status bar	Displays the icons to access the Home, Telephony, Email, and Chat functions. Also displays the logoff option.
3	Mailbox folders	Displays the folders of the mailbox.
4	Document list	Displays the list of emails related to the different status.
5	Action bar	Displays the various actions that you can perform on the action bar.
6	Processing status indicator	Displays the status of documents.
7	Agent status	Displays the status of agents. For example, agent is logged in, or is on a break.
8	Display and processing area	Displays the options to format the documents.
9	Text blocks	Displays text blocks that you can use to create messages with the uniform appearance.

Related links

Email module overview on page 61
Email Client field descriptions on page 64

[Email transmission job status icon description](#) on page 66
[Email creation icon descriptions](#) on page 66
[Email text field descriptions](#) on page 67
[Email display and processing area](#) on page 76

Email Client field descriptions

Name	Description
Import Address Book	Imports address book entries from a `CSV` file. The system displays this field only for users with relevant privileges.
Create Address Import File	Creates a template `CSV` file for importing addresses or distribution lists.
View	The options are: • **Visible Folders**: Displays the selected folders. The default folder is **Inbox**, and you cannot hide the **Inbox** folder. • **Columns**: Specifies the columns to display in the Email module.
Additional Options	The options are: • **Signature**: Creates a signature to include in outgoing emails. • **Options**: Displays options to start the notifications and specifies a time for the notification display. • **Show Search Filter**: Displays the available search filters to search a specific information in a mail folder. • **Empty recycle bin**: Deletes all documents from the recycle bin.

Related links

[Email module screen](#) on page 62

Email document status

Email status icon description

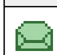
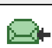
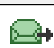
Default Icon	Email with an active reply	Email with an active forwarded message	Description
			New message
			Read message
			Active message
			Interrupted message

Table continues…

Default Icon	Email with an active reply	Email with an active forwarded message	Description
			Resubmitted message
			Deferred message
			Delegated message
			Job code missing
			Outgoing message

Related links

Email module screen on page 62

Send options field descriptions

Name	Description
Account	Displays the account number.
Send priority	Specifies the priority of the mail that you send. The options are: • **Normal**: The default setting. • **Low**: The mail with the low priority icon . • **High**: The mail with the high priority icon .
Acknowledgm.of.receipt (only for email)	Displays a confirmation when the recipient opens the email.
Immediately	Displays the document is sent immediately.
Time	Displays the document that is sent at a specified time. Default: Displays the current date and time. To change the date, click the ellipsis **...** , and then select a date from the calendar. To change the time, type the time value in the field.
Cover	Specifies to select a cover sheet from the list box for the fax

Related links

Email module screen on page 62

Email transmission job status icon description

Icon	State	Description
	Successful	Specifies a successful transmission.
	Failed	Specifies that the transmission failed.
	Active/being processed	Specifies that the transmission is active and is being processed.
	Waiting or Tried	Specifies that the transmission is being reattempted.
	Stopped	Specifies that the transmission stopped.

Related links

Email module screen on page 62

Email creation icon descriptions

Icon	Name	Description
	Bold	Formats the selected text in bold.
	Italic	Formats the selected text in italic.
	Underline	Underlines the selected text.
	Align Left	Aligns the selected text to the left margin.
	Center	Aligns the selected text to the centre of the text area.
	Align Right	Aligns the selected text to the right margin.
	Justify	Aligns the selected text on both sides.
	Horizontal Line	Inserts a horizontal line.
	Numbering	Starts a numbered list.
	Bullets	Starts a bulleted list.
	Decrease Indent	Decreases the left indent.

Table continues…

Icon	Name	Description
	**Increase Indent**	Increases the left indent.
	**Font Color**	Changes the font color.
	**Highlight Color**	Highlights the selected text in the selected color.
	**Cut**	Moves the selected text to the clipboard.
	**Copy**	Copies the selected text to the clipboard.
	**Paste**	Pastes the text from the clipboard. **Note:** You cannot paste graphics.
	**Undo**	Cancels the last change applied to the text.
	**Redo**	Restores the change that you canceled using **Undo**.
	**Spell check**	Checks the spelling of the words in the text.

Related links

Email module screen on page 62

Email text field descriptions

Name	Description
Style	Formats the text using the selected style.
Font	Applies the specified font to the selected text.
Font size	Applies the specified font size to the selected text.

Related links

Email module screen on page 62

Mailbox folders

Inbox folder

The system places the new incoming documents or resubmitted documents automatically in the **Inbox** folder.

You can perform actions on the documents on the **Action bar** or the pop-up menu.

You can perform the following actions as required:

Action	No document selected	Preview	New document created	Active document: View	Active document: Replying	Active document: Forwarding
Create	✔	✔	—	—	—	—
Reply	—	—	—	✔	—	—
Forward	—	—	—	✔	—	—
Delegate	—	—	—	✔	—	—
Send	—	—	✔	—	✔	✔
Exit	—	—	—	✔	—	—
Delete	—	—	✔	—	✔	✔
Job code	—	—	—	✔	—	—
Add attachment	—	—	✔	—	✔	✔
Transmission options	—	—	✔	—	✔	✔
Close	—	—	✔	✔	✔	✔

Note:

The delete action in **Reply** and **Forward** refers to an active reply or to a forwarded mail.

Related links

Email module screen on page 62

Sent folder

The **Sent** mailbox folder provides an overview of the latest sent mails.

Related links

Email module screen on page 62

Drafts folder

The **Drafts** folder provides an overview of all newly created documents that are not yet mailed. The folder does not display the incomplete replies and the documents for forwarding. You can access these documents exclusively by activating the original document.

The Drafts folder indicates the number of documents in the folder by a figure in brackets on the tab.

You can access the actions with and on documents through the **Action bar** or a pop-up menu.

You cannot activate Drafts as the documents are not distributed through IP Office Contact Center, but created directly by the agent. Only the agent can select and process the draft further.

When a newly created document is closed, the system discards the document if the agent did not make any entries in the header, the body, and the send options. The system displays a message to the agent to save the changes.

If you further process a document and then close, the system again displays a message to save the changes.

You can perform the following actions in Drafts:

Action	No document selected	Document selected
Newly created	✔	—
Reply	—	—
Forward	—	—
Delegate	—	—
Send	—	✔
Delete	—	✔
Hold	—	—
Job code	—	—
Add attachment	—	✔
Send options	—	✔
Close	—	✔

Related links

Email module screen on page 62

Recycle bin folder

The **Recycle bin** mailbox folder provides an overview of all emails that are deleted.

The system moves the document to the **Recycle bin** that is deleted by the supervisor, and thus removed from distribution. The supervisor can finally delete a document in the **Recycle bin** folder, or delegate the document back to a topic. You cannot delegate the document to an agent. You can only move the document into the system by delegating the document to a topic.

Related links

Email module screen on page 62

Deferred folder

The **Deferred** mailbox folder provides an overview of all on-hold documents. The system stores such documents in this folder until the configured date or time. The system then moves the documents automatically to the **Inbox** folder and marks the documents with the **Follow up** icon.

Related links

Email module screen on page 62

Completed folder

The **Completed** mailbox folder provides an overview of all completed or closed documents that are not removed from the email database. As a email agent, you can access the **Completed** folder. To see completed mails in the **Completed** folder, the agent needs the authorization for the appropriate topic. As the document is completed, the system assigns the document to a particular agent. The system maintains the assigned document in the **Completed** folder. The agent can find the documents only if the agent has access to the object or the document. An agent must have required privileges for some special functions. For example, if the email is in the agent mailbox, the agent needs authorization to view a document in the overview tab. With the relevant privileges, an agent can also view the documents of other agents.

Transactions such as an original document and the associated replies or forwarded documents are linked to each other by a unique transaction number. You must activate the automatic assignment of ticket IDs for emails.

You can add the job code column, **JCode**, to the view.

Related links

Email module screen on page 62

Overview folder

The **Overview** folder displays the documents independent of the mailbox folders in which the documents are located. The inbox folder tab displays the number of unread or new documents.

Note:

You must have the relevant privileges to use all the functions in the **Overview** folder.

In the **Overview** folder, the supervisor can intervene in the distribution of documents by delegating documents using the **Delegate** button.

The supervisor can delegate or delete all documents that are not in an **Active** status. An agent can pick up documents.

The following table displays the actions that can be performed on a document depending on the state of the document:

Action	No document selected	Preview	Active document: View	Active document: Replying	Active document: Forwarding
Delegate	—	✔	—	—	—
Pick up	—	✔	—	—	—
Delete	—	✔	—	—	—
Exit	—	—	—	—	—
Close	—	✔	—	—	—

Related links

Email module screen on page 62

Outbox folder

The Outbox folder displays all the emails that are created and send by an agent. If an email is answered and not completed the email, the system displays the email in the Outbox folder. The agent can configure Forward, Show send state and properties.

Related links

Email module screen on page 62

Archive folder

The **Archive** folder provides an overview of all completed documents that have already been moved from the Runtime database to an external database during a store run. The archive is only available if a transfer of completed documents to an external store database is planned and the UMRClientAdapter is configured accordingly. In this case, all the agents can access the Archive folder. After the transfer is complete, each document is assigned to a particular agent or topic. The assigned documents remains intact so that you can easily find your own documents again.

The types of documents displayed can be restricted for each user with rights. You can use these rights to specify which documents from which topics an agent can view. All documents from other topics are not displayed to these agents. All agents can view documents, such as read confirmations, that went directly to the agent and were then stored by the agent without being distributed through the system. You can no longer process these documents. You can only view these documents. No actions are possible if more than one document is selected.

Transactions such as an original document and their associated replies or forwarded documents are linked to each other by a unique transaction number. These unique transaction numbers can be displayed with the document. To receive unique transaction numbers, the system automatically assigns a ticket ID for an email that must be activated in the topic configuration. If a document is forwarded from the mailbox folder, the system generates a new entry in the **Completed** folder with the forwarded document and the transaction number. In this way, you can also retrace the forward action later.

The displayed documents are limited with a search filter. A free text search can be performed through the subject, the body, and the transaction number. Because the mailbox folder does not have a view of current data, the mailbox is not automatically updated.

Related links

Email module screen on page 62

Directly addressed documents

You cannot activate documents that are addressed directly to agents rather than assigned through Call Center. You can still process the document without activating the document. To get access to the uncompleted replies or documents to be forwarded, you must select the original document. The active reply or active document for forwarding is displayed in maximized form, that is, the original document is hidden. You cannot delegate directly addressed incoming documents. The original document remains selected after a reply is sent or a document forwarded. The system does not save a complete or exited document in the Completed folder.

Related links

Email module screen on page 62

New outgoing documents

When you close new outgoing emails, these emails are stored in the Drafts folder. The Drafts folder only displays outgoing documents that are not sent. You cannot activate new documents. You must select the documents saved in the Drafts folder for further processing.

Related links

Email module screen on page 62

Mailbox folder icon descriptions

The following table lists the mailbox folders and columns available for each folder type. A number in parentheses after the name of the folder indicates the number of unread documents in that folder.

The columns marked with an asterisk (*) are not the default columns. You can display these columns if necessary. The following mailbox folders are available for documents, including emails or text messages.

Icon	Mailbox folder name	Description
	**Inbox**	Contains all incoming documents. Status image, Attachment, Status text, Service, Sender, Topic, Subject, Received, To*, Cc*, Created*, Sender address* <> Inbox (symbol), attachment, status (text), service, from, topic, subject, received, to*, cc*, created*, from address*, priority*
	**Sent**	Contains all documents.

Table continues…

Icon	Mailbox folder name	Description
		Status image*, Attachment, Status text*, Sender, Topic, Subject, To, Cc*, Created, Sender address* <> Sent columns are actually: attachment, from, topic, subject, to, created, state (symbol)*, state (text)*, cc*, from address*, priority*
	Drafts	Contains draft documents that you have not sent yet. Status image, Attachment, Status text, Sender, Subject, To, Cc*, Bcc*, Created, Sender address*
	Recycle bin	Contains documents that you deleted. Status image, Attachment*, Status text*, Sender, Topic, Subject, Received, To*, Cc*, Created*, Sender address* <> Recycle bin columns are actually: state (symbol), attachment, from, topic, subject, received, state (text)*, to*, cc*, created*, from address*
	Deferred	Contains documents that will automatically be resubmitted to the Inbox at the specified date and time. This folder only appears if you have the Place emails on hold privilege. Status image*, Follow up time, Attachment, Resubmission time, Status text*, Sender, From, Topic, Subject, To*, Cc*, Created*, Sender address* <> Deferred columns are actually: attachment, follow up time, from, topic, subject, state (symbol)*, state (text)*, to*, cc*, created*, from address*, priority
	Completed	Contains all completed documents that remain in the UMR database. Status image, Ticket id, Attachment*, Status text*, Sender, Topic, Subject, Job code, Received, Mailbox, To*, Cc*, Created*, Sender address* <> Completed columns are actually: State (symbol), ticket id, from, topic, subject, job code, received, mailbox, attachment*, state (text)*, to*, cc*, created*, from address*, priority*
	Overview	Contains all documents categorized by topics. Status image, Attachment, Status text, Service, Sender, Topic, Subject, Received, Mailbox, To*, Cc*, Created*, Sender address*
	Outbox	Displays all sent documents. Attachment, Sender, Status image*, Priority*, Status text*, Sender address*, CC*, Topic, To, Subject, Created, Mailbox

Table continues…

Icon	Mailbox folder name	Description
	Archive	Provides an overview of all completed documents that have already been moved from the Runtime database to an external database during an archiving run. Status image, Transaction number, Attachment*, Status text*, Sender, Topic, Subject, Received, Mailbox, To*, Cc*, Created*, Sender address*

Related links

Email module screen on page 62

Processing status of documents in the mailbox folder

You can see the processing status of the document on the left of each document on the **Action bar** window. The system displays the area with a slightly darker background. When a new document is created, this indicator is empty at the start. The following table lists the processing status available for each document:

Name	Description
Multiselection	Displays the multiple documents that you selected.
Create mail	Displays a newly composed, outgoing email.
Reply mail	Displays a reply to a Call Center email.
Forward mail	Displays a Call Center email for forwarding.
Mail sent	Displays an email that has already been sent.
Enter job code	Specifies that you must enter a job code before the email is closed.
Reply not CC mail	Displays a written reply to an email that was not assigned to you by Call Center.
Forward not CC mail	Displays an email to forward that was not assigned to you by Call Center.
Not CC mail	Displays a non-Call Center email.
Preview	Displays an email or task that is not activated. Therefore only available for a preview.
Document does not exist	Displays a system error: `The selected document is unavailable.`
Replied	Specifies whether an email is replied to or not.
Forwarded	Specifies whether an email is forwarded or not.

Related links

Email module screen on page 62

Action bar button descriptions

You can perform various actions on the action bar, including email. The order in which the buttons are displayed varies for individual actions. The following table lists all the buttons available in **Action bar**:

Icon	Name	Description
	New	Creates a new document.
	Send	Sends the document. This button is always the first button on the left of **Action bar**.
	Reply	Replies to the sender of a document.
	Reply all	Replies to all senders of a document.
	Delete	Deletes a document.
	Save	Saves the document. If you are writing a new email, the email is saved in **Drafts**.
	Defer	Puts the document on hold.
	Forward	Forwards the document.
	Retry	Sends the document again after a failed transmission.
	Resend	Sends another copy of the document.
	Delegate	Delegates or assigns the document, and adds a note to the document.
	Pick	Picks up the document.
	Complete	Completes the processing of a transaction. The stored document is closed and moved to the **Completed** folder.
	Job code	Allocates a job code.
	Mandatory Job code	Indicates that a job code is required.
	Add attachment	Adds an attachment to the document.
	Send options	Configures send options.
	Stop	Stops the transmission job.
	Note	Adds a note. You can add a note when delegating a document or putting it on hold for resubmission. The **Note** icon appears in the document list and in the mail header of a document. To read the note, click the icon in the mail header.
	Print	Prints the document.
	Maximize	Maximizes the work area.
	Restore	Reduces the work area.

Table continues…

Icon	Name	Description
×	**Close**	Closes the document. If you make changes to the document, the following message is displayed: `Document was changed`.

Related links

Email module screen on page 62

Email display and processing area

To process documents, you can use the email display area and processing area located below the **Action bar**. If you are replying to an email, the following areas are displayed:

- Email display area
- Processing area: For example, the reply to an email that you are in the process of writing.

Related links

Email module screen on page 62

Opening the Email module

Procedure

On the task bar, click the **Email** module icon ✉.

The system displays the Email module screen.

Related links

Email module overview on page 61

Using Email menu bar commands

Procedure

In the menu bar, do one of the following:

- Click **Menu** and select a **Command**.
- Press **F10** or the **Alt** key, and use the cursor to navigate to the command you want.

Related links

Email module overview on page 61

Email privileges

Privileges are used to control the applications that an agent can use and the actions that the agent can execute within the applications. Depending on your privileges, the system displays relevant icons in the **Administration** task bar. System administrators set up privileges in the Configuration module.

The email privileges are:

- Email Administrator
- Keyword-based email routing
- Textblock administrator
- Email Supervisor
- Using textblocks
- Agent queue view
- Deleting emails
- Email Archive
- Defering emails
- Printing emails
- Automatic log in
- Replying as agent

Related links

Email module overview on page 61

Customizing mailbox folders

Configuring visible folders

About this task

You cannot hide the **Inbox** folder.

Before you begin

Select the folders to display.

Procedure

1. Click **E-Mail Client** > **View** > **Visible Folders**.
2. In the **Visible Folders** dialog box, do one of the following:
    - Use the **>>** and **<<** buttons to configure the visible folders.

- You can use the **Up** and **Down** arrow buttons to modify the sequence of the **Selected folders** displayed.

3. Click **OK**.

Related links

Email module overview on page 61

Displaying extended state text

About this task

For the **Inbox**, **Deferred**, and **Overview** folders, you can configure the extended display text. You can also configure whether to display the following information:

- No answer sent
- No forwarding sent

The settings are saved as personal settings when the agent logs off.

Before you begin

Specify the columns to display for each folder.

Procedure

1. Click **E-Mail Client** > **View** > **Columns**.

   The system displays the Inbox-Columns dialog box, with two lists:

   - **Available columns**: Displays all the columns that are available for the relevant mailbox folder.
   - **Selected columns**: Displays all the selected columns for the relevant mailbox folder.

2. Click the **Show extended state text** check box according to your needs.
3. Click **OK**.

Related links

Email module overview on page 61

Selecting columns

Procedure

1. Click **E-Mail Client** > **View** > **Columns**.

   The system displays the Inbox-Columns dialog box, with two lists:

   - **Available columns**: Displays all the columns that are available for the relevant mailbox folder.
   - **Selected columns**: Displays all the selected columns for the relevant mailbox folder.

2. To move a column from one list to the other, select the column and then click on the relevant arrow.
3. In the **Selected columns** list, you can use the **Up** and **Down** arrow buttons to modify the sequence of the displayed columns.
4. Click **OK**.

Related links

Email module overview on page 61

Sorting columns

About this task

The sort direction is indicated by a small arrow. An upward arrow indicates an ascending order and a downward arrow indicates a descending order.

Procedure

1. Click a column header.

   The system displays the selected column header as dimmed.
2. Click the column header again to reverse the sort sequence.

Related links

Email module overview on page 61

Changing column width

Procedure

1. Click the column separator.

   The system changes the shape of the mouse pointer.
2. Use the mouse to slide the separator line to change the width of the column.

Related links

Email module overview on page 61

Changing the work area

About this task

You can maximize or minimize the work area.

Procedure

1. To maximize the size of the work area, click **Maximize** icon □.

The system hides the list of mails in the work are and displays the details of the selected mail.

2. To display the document list again, click the **Restore** icon .

   The system displays the list of mails in the selected folder.

Related links

Email module overview on page 61

Key sequences

Email editor key sequences

Name	Description
Ctrl+A	Select all
Ctrl+C	Copy to clipboard
Ctrl+V	Add the clipboard content
Ctrl+X	Move to the clipboard
Ctrl+Z	Undo
Ctrl+Y	Retry
Ctrl+B	Indicates bold
Ctrl+I	Indicates italic
Ctrl+U	Underline
Ctrl+E	Center
Ctrl+L	Align left
Ctrl+R	Align right
Ctrl+Shift+Z	Delete formatting
Ctrl++	Bigger type size
Ctrl+-	Smaller type size
Ctrl+Shift++	Increase indent
Ctrl+Shift+-	Decrease indent

Related links

Email module overview on page 61

Email list view key sequences

Name	Description
Ctrl+Home	First page
Ctrl+End	Last page
Ctrl+Page Down	Previous page
Ctrl+Page Up	Next page

Related links

Email module overview on page 61

Email function and command key sequences

Name	Description
Ctrl+N	Create new email
Ctrl+R	Reply
Ctrl+Shift+R	Reply with options
Ctrl+Shift+I	Reply all with or without the original message
Ctrl+W	Forward
Ctrl+G	Delegate
Ctrl+Shift+K	Defer
Ctrl+D	Delete
Ctrl+Shift+A	Use Job code (email)
Ctrl+Shift+E	Send
Ctrl+H	Add attachment
Ctrl+S	Save
Ctrl+T	Activate the selected email and change to the email text view
Ctrl+F	Active the search filter
Ctrl+O	Set the focus on the current folder list
Ctrl+Shift+T	Select textblocks
ESCAPE	Leave textblock, and return to email editor

Related links

Email module overview on page 61

Address books

Address books overview

In the Email module, you can use a personal address book, a shared address book, or both.

When addressing a message in the address book, you can select the names, the email addresses, and the distribution lists.

When you type a name in the **To**, **Cc**, or **Bcc** fields in an email message, the Email module automatically checks the address book for matching names. If a matching entry is found, the system inserts the name displayed and the email address and sends a message. If a match is not found, the system displays a message asking for more information. If you enter more than one letter for a name, the system displays a list of matching names to select from the list.

In addition to using an address book to address messages, you can search for other information in the address book by entering a name. For example, office addresses and telephone numbers .

Types of address books:

- Personal address book
- Shared address book
- External address book

Personal address book

The personal address book consists of a list of names and the distribution lists that you can create and maintain. Personal address book entries are stored in a file. You can also import a personal address book.

Limitations: Importing address book data has the following restrictions:

- When you import data, the system overwrites all data that is in the address book. Therefore, you must always import the address list and the distribution lists together.
- You cannot import addresses or each distribution list at a later date.
- If you create the CSV file in Microsoft Excel, you cannot have a single value in a row. Microsoft Excel interprets all remaining columns as being empty and creates a line in the format `<Distribution list name>;;;;;;;;;;;;;;`. You must precede the name with a hash mark (#) so that the distribution list recognizes the names during import.

Error handling: If the address book server is unavailable, the system displays an information message to that effect. You cannot import data in this situation. The Email module attempts to restore the connection to the address book server. To attempt a new import, you must open the import window again. If errors occur during an import operation, these errors are written to a log file.

Import files: Import files must be ASCII text files. The file extensions CSV and TXT are permitted.

Shared address book

The shared address book contains the names and email addresses of all users within your organization. This address list is centrally created and maintained by the system administrator. The shared address book can also contain the email addresses of shared distribution lists.

External address book

Your system administrator can connect an external address book so that you can use the relevant information.

Related links

[Email module overview](#) on page 61

Searching address books

Procedure

1. In an active email, click **To**.
2. In the Targets dialog box, type your search criterion.

   You can limit your search if required. Choose the relevant list box entries, for example, **Personal address book**.
3. Click **Search**.

   The system displays a list containing the matching entries. A scroll bar is added if necessary.
4. From the list of entries, select the required entry.
5. To transfer the entry, click **To**, **Cc** or **Bcc**.
6. Click **OK**.

   You can change the data and add or delete addresses, if required.

Address book search field descriptions

Use the following information to limit the search in the address books:

Name	Description
Address books	The list of available address books. The options are: • **All address books** • **Global address book - Exchange**
Search all	The search criteria. The search fields are: • **Last Name** • **First name** • **Email** • **Phone (mobile)** • **Phone (business)**
Distributor	A list of names of all complied recipients. The field represents a simple tool for sending messages to a group of people. When you send a message to a

Table continues…

Name	Description
	distribution list, the message goes to all the recipients on the list. The recipients can view their own name in the **To** line with the names of all other recipients. However, the name of the distribution list is not displayed.
Service	The service you can send messages: • **Email**: The message is sent as an email to the email address.

Displaying and changing transmission settings

About this task

You can view and change the transmission settings. You cannot change the properties of an address book entry in the address book. If you change a transmission setting, these changes only apply to the current transmission job.

Procedure

1. In the message or in the addressing window, double-click on the entry in the **To**, **Cc**, or **Bcc** field.
2. In the Send details dialog box, change the following transmission settings:
    - **Service**
    - **Target**
    - **First name**
    - **Name**
    - **Street**
    - **ZIP code**
    - **Town**
    - **Country**
    - **Company**
3. Click **OK**.

Related links

Email module overview on page 61

Displaying distribution lists

About this task

The distribution list displays the names of the recipients with the following information:

- Last name
- First name
- Email address

You can only see the distribution list. You cannot add or remove recipients or change the distribution list in the address book. You can, however, use this procedure to revise the recipients of the current document and change the distribution list.

Procedure

1. Click the entry in the **To**, **Cc**, or **Bcc** field.
2. In the Address book dialog box, select a distribution list.
3. Click the **To**, **Cc**, or **Bcc** field.

   The system transfers a distribution list to the field.
4. Click **OK** to apply your selections.

Related links

Email module overview on page 61

Importing files

Before you begin

- Create a suitable CSV files for the address book and distribution lists.
- Import atleast one address book list or one or more distribution lists.
- Gain access only the imported address book list or the distribution lists.

Procedure

1. On the **File** menu, select **Import for address book**.
2. In the Import addresses for personal address book dialog box, in **Addresses**, click **Browse**.
3. Select a file.
4. In **Distribution lists**, click **Browse**.
5. Select a file.
6. Click **Import**.

   The system imports the data files and displays the log file. This file contains all information about the import.

7. Click **Close**.

   The data in the personal address book and the distribution lists is ready for immediate use.

Creating CSV file templates

About this task

You can create specific templates for importing the addresses or the distribution lists.

Procedure

1. In the **File** menu, click **E-mail client**.
2. Click the **Create address import** file.

   The system displays the Create CSV file templates dialog box.
3. Select the required entries for the **Address book** or the **Distribution list** field.
4. Do one of the following:
   - For an address import, click **Template for address import**.

     You can apply the following fields for a template for address import:

     `LastName, FirstName, State, Province, PostalCode, City, Company, Street, Department, MailboxDisplay, PhoneNumber, MobilePhone, PrivatePhone, BusinessFax, MailAddress, Country, EntryId`
   - For a distribution list, click **Template for distribution lists**.

     You can apply the following fields for a template for distribution lists:

     `voiceAddress, mailAddress, smsAddress, faxAddress, DisplayName, ForeignKey, UniqueKey, LastName, FirstName, Gender, Sex, State, Province, PostalCode, City, Company, Street, Department, Title, HomePage, BusinessURL, Category, MailboxDisplay, PhoneNumber, PhoneNumber2, MobilePhone, MobilePhone2, PrivatePhone, PrivatePhone2, OtherPhone, OtherPhone2, Fax, BusinessFax, Fax2, PrivateFax, EmailAddress, MailAdress, EMailAddress2, EMailAddress3, Country, UserDef1, UserDef2, UserDef3, UserDef4, UserDef5, UserDef6, UserDef7, UserDef8, UserDef9, UserDef10, HomePage2, PrivateURL, EntryId, NotesTicketId, GPTicketId, SMS, SMS2, AdbId`

   The system creates a .csv file for the address import or the distribution list template.
5. Save the .csv file that you created or open with another application.

Import file specifications and examples

Import information (header)	The columns to which the values in the subsequent data records are assigned are defined in the first row. The column names must match the names permitted for importing addresses into this address book.

The valid column names can be seen in the dialog box.

Leading or trailing blanks in the column names are ignored.

Column names are case-sensitive.

Invalid columns are not imported and a corresponding error message is displayed in the log file.

Data records

The data records must be arranged in rows.

The individual values must be separated by semi-colons (;).

The values must not contain semi-colons.

Type-dependent (address list or distribution list) import information must be placed at the beginning of the import data.

The import files may contain any number of empty rows.

The remaining rows contain the actual data records with the values to be assigned to the various columns.

Columns may be left empty.

The number of values including empty values must match the number of values in the import information header.

Rows containing an invalid number of values are ignored during the import.

A corresponding error message is written to the log file.

Leading or trailing blanks in the values are ignored.

Rows containing only empty values are ignored. A corresponding error message is written to the log file.

Address book import file example

The following example shows a file used to import a personal address book.

```
EntryID; LastName; FirstName; Street; PostalCode; City; PhoneNumber;
MailAddress
123; Utzer; Ben; Dorfstraße 34c; 22941; Bargteheide; 04532-1234567;
ben@firma.com
124; Comergo Bargteheide; ; Bahnhofstraße 24; 22941; Bargteheide;
04532-269 0; info@comergo.com
125; Bredet; Vera;;;;;vera_b@web.de
```

Distribution list import file example

The following example shows a file used to import a distribution list:

```
LastName; FirstName; voiceAddress; faxAddress; mailAddress; smsAddress;
DisplayName
Department A
Utzer; Ben; 04532-269 0; 04532-269 199; ben.utzer@avaya.com;;Benni
Bredet; Vera; 089-999 888; 089-999 999; verabredet@firma.de; ; VeraB
Gent; A.; 04532-123 456; 04532-269 199; agent@umrtest.int; ; A.Gent
#Department B;;;;;;
```

```
Maier; Carsten; 04532-123456; 04532-40123456; carsten.maier@firma.com; ;
CarstenM
Müller; Christian; 04532-123457; 04532-40123457;
christian.mueller@firma.com;; ChristianM
Schultze; Stefan; 04532-123458; 04532-40123458;
stefan.schultze@firma.com; ; StefanS
```

Displaying valid column names

About this task

You must specify the column names in the first row of the import file so that the system displays valid column names. You can display valid column names.

Procedure

1. On the **E-mail Client** menu, select **Import address book**.
2. In the **Address book and the distribution list import** dialog box, click **Show**.

   The system displays the underlined valid column names that are included in the import.

Importable columns

Your system administrator can configure the importable columns in the Address book administration application.

Column characteristics	Description
Columns	The following columns are defined for the pre-configured personal and shared address books: `ForeignKey, LastName, FirstName, Gender, State, Province, PostalCode, City, Company, Street, Department, Title, Homepage, Category, MailboxDisplay, PhoneNumber, PhoneNumber2, MobilePhone, MobilePhone2, PrivatePhone, PrivatePhone2, OtherPhone, OtherPhone2, Fax, Fax2, EmailAddress, EMailAddress2, EMailAddress3, EntryId`
Restrictions	Only the EmailAddress column is currently used for sending a message by email.
Distribution lists	Individual entries in a distribution list might contain all the above columns. In addition, the mailAddress, faxAddress, smsAddress, and voiceAddress columns must be present. When a message is sent to a distribution list, these additional fields are used as the destination that is email message to mailAddress.

Table continues…

Column characteristics	Description
	In a distribution list, the columns listed are seen as address information for the person. The four additional fields serve as unambiguous destination addresses for the transmission of the message. For example, you can deliberately use one set of email addresses for a bowling team distribution list and another for a development department distribution list although the people involved might be the same.

Setting folder options

Options field descriptions

Name	Description
Activate call center e-mail on selection	Indicates that the message is automatically activated when you click on it.
Show CC input	Specifies that the **CC** field must be displayed when you are processing a message.
Show BCC input	Specifies that the **BCC** field must be displayed when you are processing a message.
Play sound on incoming mail	Plays the configured sound when you receive an email. You can configure the sound at New Mail Notification in the **Sounds** tab in **Control Panel – Sounds and Audio Devices**.
Show message on incoming mail	Displays a notification when you receive a new email.
Close message manually	Indicates that the notification is closed after the set period of time. If you choose this option, you must close the notification manually.
Close after	Specifies the time period after which the notification is closed. The time is expressed in seconds, and you can set a time between 0 and 60 seconds.
Rows	Specifies the number of rows displayed in a folder. The default value is 100 rows You can scroll down if the folder contains more that 100 lines.
Always display paging info	Displays the visible scroll icons.

Related links

Email module overview on page 61

Setting the Options

About this task

You can specify how and when a folder is updated. You can set an interval between 0 and 60 seconds to automatically update the folder, or you can update the folders manually. Avaya does not recommend this setting.

Procedure

1. Click **E-Mail Client** > **Additional options** > **Options**.
2. In the Options dialog box, enter the required settings.
3. Click **OK**.

Related links

Email module overview on page 61

Viewing documents in mailbox folders

Procedure

Click on the relevant mailbox folder tab to display documents within that folder.

Related links

Email module overview on page 61

Paging through mailbox folders

About this task

If you set the **Maximum rows displayed** option, the system displays a line below the entries. If you have selected the **Always display paging info** option, the scroll functions are always available.

Procedure

1. To page through the search results, click one of the following:
    - The next icon >>: To go to the next page.
    - The previous icon <<: To go to the previous page.
    - The last icon >|: To go the last page.
    - The first icon |<: To go the first page.
2. To go to a particular page, enter the page number and click **Go to**.

    The system displays the report in the selected page.

Related links

Email module overview on page 61

Using search filters

About this task

Use this procedure to limit the number of documents that are displayed in each folder. The field indicating the number of lines to display is set automatically to 100. If more than 100 documents are present in a folder, the system displays the controls of the search function automatically.

If you have the View extended Archive privilege, you can also search in the **Archive** folder for mailboxes of deleted agents or topics. The search filter limits the documents that are displayed.

Note:

In the **Archive** folder, you cannot disable the search function or hide the search input fields.

Procedure

1. Click **E-Mail Client** > **Additional options** > **Show search filter**.
2. Use the following search criteria:
   - **Search for**
   - **Search in**
   - **Recipient**
   - **From**
   - **From To**
   - **Topic**
   - **Ticket ID**
   - **Mailbox**
   - **Status**
3. Click the **Use filter** icon.
4. **(Optional)** To clear all fields, click the **Reset filter** icon.
5. **(Optional)** To hide the input fields for the search function, click the **Close** icon
6. **(Optional)** To search the mailboxes of deleted agents and topics, do the following:
   a. Perform a search in the **Archive** folder.

      The system displays a mailbox list of deleted agents and topics in a different font.
   b. Select an agent or topic.

Related links

[Email module overview](#) on page 61
[Show search filter field descriptions](#) on page 92

Show search filter field descriptions

You can use the following search criteria:

Name	Description
Search for	Searches for parts of words.
Search in	Searches in the **Subject** line or the **Subject and text** body.
Recipient	Searches for a recipient.
From	Searches for a sender.
From **To**	Specifies to select a date in the **From** and **To** field. You can enter the time.
Topic	Searches for a topic.
Ticket ID	Searches for a Ticket ID, which is only available in the **Completed** folder.
Mailbox	Enters the mailbox in the **Completed** and **Overview** folders that you want to search within mailbox.
Status	Displays the status of the email. For example, Forwarded, Received, Replied, and Sent.

Related links

[Using search filters](#) on page 91

Activating documents

About this task

You can activate only one document at a time. If you activate a second document, the first activated document is placed in the **Break time** state. If you make changes to the first document without saving, the system displays a message to save the document. When you close an active document, the system places the document in the **Break time**.

Note:

If the agent is on a break, only a preview is permitted. The documents cannot be activated. This applies both to documents assigned by IP Office Contact Center and to directly addressed documents.

Before you begin

- Activate the documents before processing through IP Office Contact Center.

- Activate a document to access incomplete replies or documents for forwarding.

Procedure

Do one of the following:

- Double-click on the document.
- Right-click on the document, and select **Activate** from the pop-up menu.

Related links

Email module overview on page 61

Viewing the document process and transmission status

About this task

You can view the processes for a document and see the transmission status in the **Outbox** and **Sent** folders.

Procedure

1. Right-click a document and select **Show send state**.
2. In the Show send state dialog box, click one of the following:
   - **Stop**
   - **Retry**
   - **Resend**
   - **Delete**

Related links

Email module overview on page 61

Creating new documents

Procedure

1. Click **Inbox** folder, and then click the **New** icon .

   The system changes the processing status indicator to **Create E-mail**.

   The system displays buttons in **Action bar**. The **To** button and the **Subject** field are displayed along with **Maximize work area** icon and **Close** icon .
2. In the **To** field, do one of the following:
   - Select an address book.
   - Enter the address.

3. **(Optional)** To select an address in the Address book, do the following:
    a. Click the **To** button.
    b. Select the appropriate Email service.
    c. Select an address book.
    d. Enter a search term.
    e. Click **Search**.
    f. Select an entry.
    g. Click **To**, **Cc**, or **Bcc**.
    h. Add more recipients if necessary.
    i. Click **OK**.
4. **(Optional)** Type the recipients address in the **To** field.

    For example, **Email**: *SMTP=name@company.com*. If you use multiple recipients, separate with semicolons (;).
5. Click **OK**.
6. Enter a subject in the **Subject** field.
7. Enter the text in your email.
8. **(Optional)** To save the document temporarily while you are composing it, click the **Save document** icon .
9. To send the document, click the **Send document** icon .

Related links

Email module overview on page 61

Performing spell checks

About this task

When you write a message, you can check the **Subject** line and the body for spelling errors. You can select a language. The system displays entries that are not found in the dictionary and suggests a replacement. You can accept or ignore the suggestion or suggestions. The default language of the user interface is the language that you select.

Procedure

1. Within a message, click the **Spelling** icon .

    The system displays the Spellchecker dialog box with a text message. The system displays the first entry that is not found in the dictionary. The **Change into** field displays the suggested entry.

Note:

You cannot edit the text in the **Spellchecker** dialog box.

2. To apply the change, click **Change**.

   The system replaces the entry with the selected entry and automatically selects the next misspelled word in the message.

3. To select a replacement word, from the **Suggestions** list, select a word.

   The system displays the selected word in the **Change into** field.

4. To ignore the suggested change, click **Ignore**.
5. **(Optional)** You can discard the change for all instances of a word by clicking **Ignore all**.
6. Click **Apply**.

   The system applies the selected changes to the text and displays the text.

7. **(Optional)** If you do not want to apply the changes, click **Close** and do one of the following:
   - To discard changes, click **OK**.
   - To cancel the discard changes, click **Cancel.**

Related links

Email module overview on page 61
Spell check field descriptions on page 95

Spell check field descriptions

Name	Description
Language	Displays the language of the dictionary.
Not in dictionary	Displays a word that is not in the dictionary.
Change into	Displays the modified text. You can edit the text as required.
Suggestions	Displays suggestions from the dictionary.

Button	Description
Ignore	Ignores a word.
Ignore All	Ignores all instances of a word.
Change	Changes a word as specified in the **Change To** field.
Change All	Changes all instances of a word as specified in the **Change To** field.
Apply	Applies the changes to the text.

Table continues…

Button	Description
Add Word	Adds a word.
Close	Ends the spelling check. The system displays a message asking whether you want to discard the changes.

Related links

[Performing spell checks](#) on page 94

Text blocks

You can use text blocks to create messages that are uniform in appearance. The text blocks can also contain, for example, templates for opening salutations and a closing phrase. When you are editing a message, an additional window is displayed on the right-hand side of the screen containing the available text blocks. The view is organized in a tree structure.

Text blocks can contain placeholders. A placeholder is a kind of a variable. The system normally substitutes a placeholder automatically. Where necessary, your system administrator can use a placeholder to insert extra information into the message.

Note:

When you make changes to a text block, you must log off and log in again to see and use the changed block.

The options to navigate to Text blocks are:

Name	Description
+	Indicates that the folder contains one or more text blocks or subfolders.
-	Displays the opened folder.
	Displays a folder that might contain subfolders.
	Displays the Text block.

Related links

[Email module overview](#) on page 61
[Inserting text blocks](#) on page 96

Inserting text blocks

Before you begin

Get the Use Text blocks privilege.

Procedure

1. To navigate the text blocks, click one of the options.
2. **(Optional)** To change and sort the text block view, click one of the following:
   - Language: Displays only text blocks in a specific language.
   - Topics: Displays only text blocks in a specific topic.
3. **(Optional)** To display or hide the text block view, click on the right or left arrow.
4. To edit a message, select the text block, and do one of the following:
   - Double-click on the text block.
   - Select the text block and click **Paste**.

   When you send the message that contains placeholders, the system displays a **Replace unknown placeholders** dialog box.
5. Enter information into the placeholder field.
6. Click **OK**.

Related links

Text blocks on page 96

Sending documents

About this task

You can set the agent name or a topic as the sender of an email, a reply, or a forwarded document. For replies, the default is to use the topic through which the document entered the system. For forwarded or new documents, the agent is set as the default sender. Any topic for which the agent in question has authorization is available for use.

Before you begin

Create a new document.

Procedure

To send the document, click the **Send document** icon.

Related links

Email module overview on page 61

Email reply

You can send a reply with or without the original text. The text of the original document is automatically incorporated when you send a reply to a document. The formatting is retained in HTML emails. A header is generated and placed before the text.

For example:

```
-----Original Message-----

From: <Sender of the original message>
Received: <Date and time the original document was received>
To: <Recipient of the original message>
Cc: <Cc recipient of the original message>
Subject: <Subject of the original message>
[..] Text of the original document [..]
```

Attachments to the original document are not incorporated into replies.

Each original document can have only one active reply. You can send any number of replies to an original document.

After you send a reply, the status icon for the original document reverts to the standard icon with no active reply. You cannot close or exit the original document if an answer exists, which is not sent or deleted.

The system displays the default topic to use, the way the document entered the system. The agent is set as the default sender. The agent can use only those topics to which the agent has authorization.

Replies are sent in a multipart or alternative format. That is, the body is present in both plaintext and HTML form.

Related links

Email module overview on page 61
Replying to documents on page 98

Replying to documents

Procedure

1. Click one of the following:
   - The **Reply** icon .
   - The **Reply** list box, and select **Reply with original** to include the original message with your reply.
   - The **Reply** list box, and select **Reply without original** to send a reply without including the original message in your reply.

   The original email view is hidden, and the area containing the prepared reply document is maximized. The name of the sender is inserted in the **To** field. The system displays **Re:** in the **Subject** field with the text of the original subject line.

Note:

If the document is closed without sending a reply, the system saves the reply and remains linked to the original document. The original document is marked with a corresponding icon. The system does not display these replies in the **Drafts** folder.

2. **(Optional)** With Reply as an agent privilege, you can select a sender address in the **From** field.

   Note:

   You cannot enter free text for a sender address. You can only select an agent or topic as a sender.

   a. Click the **From** button.
   b. From the **Sender** list box, select an agent or a topic.

      The agent is separated from the topics by a broken line. The topics are in alphabetical order.

3. Enter the text of your email.
4. **(Optional)** To save the document temporarily while you are composing the document, click the **Save document** icon .
5. **(Optional)** To discard an active reply, click the **Delete** button.

   The system displays the original document again.

Related links

Email reply on page 98

Forwarding documents

About this task

Attachments to the original document are included with forwarded documents.

Each original document can only have one active document for forwarding. You can forward an original document any number of times.

After a document is forwarded, the status icon of the original document reverts to the standard icon with no active document to forward. You cannot close or exit the original document while an answer exists that is not sent or deleted or is waiting to be forwarded or deleted.

The agent is the sender by default. Any topic for which the agent in question has authorization is available for use.

Forwarded documents are sent in a multipart prealternative format. The body of the document is present in both plaintext and HTML format.

Procedure

1. Click the **Forward** button .

   The original email view is hidden and the area containing the prepared forwarding document is maximized. **Fwd** is inserted in the **Subject** field along with the text of the original subject line.

2. In the **To** field, do one of the following:
   - Select an address book.
   - Enter the address.

3. **(Optional)** To select an address in the Address book, do the following:

   a. Click the **To** button.

   b. Select the appropriate Email service.

   c. Select an address book.

   d. Enter a search term.

   e. Click **Search**.

   f. Select an entry.

   g. Click **To**, **Cc**, or **Bcc**.

   h. Add more recipients if necessary.

   i. Click **OK**.

4. **(Optional)** Type the recipients address in the **To** field.

   For example, **Email**: *SMTP=name@company.com*. If you use multiple recipients, separate with semicolons (;).

5. Click **OK**.

6. Enter the text in your email.

7. **(Optional)** To save the document temporarily while you are composing it, click the **Save document** icon .

8. **(Optional)** To discard an active document, click the **Delete** button.

   The system redisplays the original document.

9. To send the document, click the **Send document** icon .

Related links

Email module overview on page 61

Picking up documents

Procedure

1. In the **Overview** folder, select a document.
2. Click the **Pick** icon .

   The system displays the document as **Delegated** in your Inbox, and you can process the document.

Related links

[Email module overview](#) on page 61

Delegating documents

About this task

You can select the agent or topic to which the document is delegated from a list of possible destinations. You can select the destinations available at that time. In addition, you can add a note.

Procedure

1. Click the **Delegate** icon .

   The system displays a window to select a destination.
2. From the list box, select a destination.

   Destinations are divided into topics and agents. Green indicates available, and red indicates temporarily unavailable. For example, if the agent is not logged in. You can delegate the document to an agent that is temporarily unavailable.
3. **(Optional)** To provide the delegate with context for the document, type text in the **Note** field.
4. Click **Delegate**.

   The system delegates the document to an agent or a topic in line with the email flow. If you enter an agent as the destination, the system sends the document directly to that agent.

   The system removes the document from the mailbox folder. In addition to the entries made by the agent, the system displays in the note the name of the agent who delegated the document.

Related links

[Email module overview](#) on page 61

Emptying the recycle bin

About this task

You can empty the recycle bin in the **Deleted** folder.

Warning:

You cannot undo the delete action.

Procedure

In the **Email-client** folder, click **Additional options** > **Empty recycle bin**.

The system deletes all documents.

Related links

Email module overview on page 61

Closing transactions

About this task

Close transactions to complete the processing action on the system.

Procedure

Click the **Complete processing of transaction** icon.

Related links

Email module overview on page 61

Creating signatures

About this task

You can create a personal signature with specific information. You can select whether to add your signature automatically to each message.

Procedure

1. Click **Email Client** > **Additional options** > **Signature**.
2. In the **Personal signature** dialog box, type your signature.
3. Select **Use signature**.
4. Click **OK**.

   The system inserts your signature in each message.

Related links

[Email module overview] on page 61

Allocating job codes

About this task

You can enter the job code more than once. Only the last value given is stored. The current job code is displayed in the email header.

Note:

If a job code is required before the original document can be closed, then the system displays a small warning icon in orange or red LED on the **Job Code** icon.

Procedure

Click **Allocate job code**.

Related links

Email module overview on page 61

Adding attachments

Procedure

1. In the mailbox folder action bar, click the **Add attachment** icon.
2. In the **Add attachment** dialog box, click a file.
3. Click **Open**.

   The system displays the selected file at the bottom of the email.

Related links

Email module overview on page 61

Downloading and opening attachments

About this task

Attachments to the original document are displayed in a separate area at the bottom of the mail. Each attachment displays the file name and size in bytes.

You can open the attachment directly if the type of attachment is known or if an appropriate application for the type is registered. If the type is unknown, you must first download the attachment.

Note:

You can only view an attachment if you activate the document. If the file does not open in the program that you expect, contact your system administrator to change settings.

Procedure

Right-click the attachment and click one the following:

- **Open**.
- **Save**.

  You can select a folder and save the attachment with a name.
- To remove the attachment, Click **Remove**.

Related links

Email module overview on page 61

Editing attachments

About this task

Use this procedure to edit an attachment. You can attach additional information to a document. You can use the following functions for an attachment:

- Open (known type)
- Download (all types)
- Play back (telephone number) via telephone (WAV files only)
- Uninstall components

If you have the correct setup, you can listen to a WAV file over your telephone.

Procedure

1. Right-click the attachment.
2. In the pop-up menu, click a function.

Related links

Email module overview on page 61

Setting Send options

About this task

You can configure send options for all outgoing documents, including new documents, replies, and forwarded documents.

Procedure

1. Click the **Send options** icon.
2. Select one or more of the following options:
   - **Account**
   - **Send priority**
   - **Acknowledgm.of.receipt (only for email)**
   - **Immediately**
   - **Time**
   - **Cover**
3. **(Optional)** To discard the settings, click **Cancel**.
4. Click **OK**.

   After you make changes to the body or header of an email or send options, the system displays a message whether to save the changes when you close the document. You can again view and make changes to the send options that are set and saved when the document is closed.

Related links

Email module overview on page 61

Holding and resubmitting documents

Procedure

1. On the **Action bar**, in the mail view area, click the **Defer** icon.
2. Enter the date and time at which you want the document to be resubmitted.
3. In the **Note** field, type a note.
4. Click **Defer**.

   The system moves the document to the **Deferred mailbox** folder that is stored until the specified date and time. After the specified date and time, the system moves the document to the **Inbox** folder marked with the **Resubmission document** status icon. When you open the document, click the **Note** icon to read the note, which displays in the second column.

Related links

Email module overview on page 61

Saving draft documents

Procedure

Click the **Save document** icon .

The system saves the document to the **Drafts** folder.

Related links

Email module overview on page 61

Repeating failed transmissions

About this task

If the original transmission ends with an error, you can repeat the transmission.

Procedure

1. In the **Sent** folder, right-click the document that could not be transmitted.
2. In the pop-up menu, click **Show send state**.
3. If the transmission fails, select the document.
4. Click the **Retry** icon .

   The system repeats the transmission.

Related links

Email module overview on page 61

Resending documents

Procedure

1. In the **Sent** folder, right-click the document and select **Show send state**.
2. Select the document and click the **Resend** icon .

   The system displays the document in edit mode.
3. Edit the document and enter a new subject or address if necessary.
4. To send the document, click the **Send document** icon .

Related links

Email module overview on page 61

Printing documents

Before you begin

Connect your computer to a printer with the appropriate privileges.

Procedure

1. Click the **Print** icon .
2. In the **Print** dialog box, click the **Select Printer** option and select the printer.
3. Click **Apply** and then click **OK**.

Related links

Email module overview on page 61

Viewing message properties

About this task

Every message in the system has certain properties. When a topic receives a new message, the system automatically assigns a number or Ticket-ID to the message. The system uses Ticket IDs to logically connect customer requests and queries related to the same transaction. You can track the events associated with a message with Ticket IDs. The system administrator sets the **Automatically issue ticket IDs** option for the topics using the Configuration application.

Procedure

1. Right-click a message.
2. In the pop-up menu, click **Properties**.

   The system displays the following message properties:

   - Document ID
   - Folders
   - Write-protected
   - Mailbox
   - Send priority
   - Replied
   - Forwarded
   - Auto-replied
   - Task state
   - Original topic
   - Actual topic

- Attribute

Related links

Email module overview on page 61

Chapter 6: Chat module overview

Chat is an electronic communication in real time. You can edit chat requests with the IP Office Contact Center Chat module.

The Chat module is divided into three areas:

- List view
- Chat progress
- Chat input

If necessary, you can use the scroll bar to set the height of each area.

List view

The List view displays the following information in chat requests:

- Status
- New request
- Topic
- Participant
- Participant address
- Started
- Text
- Customer name

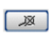
Chat progress

Chat progress displays details in chronological order, including the time of the chat, the name of the chat participants, and the chat message. You can print chat progress.

Chat input

In the **Chat input** field, you can type and send a text to the **active chat request** field. The function of smilies and spell check are unavailable in the Chat input.

Chat request icon descriptions

Icon	Name	Description
	**Maximize**	Maximizes the chat progress.
	**Print**	Prints the chat progress.
	**Smilies**	Unavailable in chat request.
	**Spell check**	Unavailable in chat request.
	Send	Sends the text.
	**Complete**	Completes the chat request.
	**Job code**	Enables you to choose a job code.
	**Required Job code**	Enables you to choose a required job code.
	**Archive**	Archives a folder.
	**Search**	Displays archived chat requests in the Store folder.
	**Reset**	Resets the search criteria.

List view field descriptions

Name	Description
State: New	Displays a new chat request.
State: Read	Indicates that the chat request text is read. Chat progress displays the chat request message.
State: Active	Displays the active chat request. Chat progress displays the chat request text.
New message	Displays a new chat message. Chat request is inactive.
Composing	Displays that the participant is typing.
Topic	Displays the IP Office Contact Center topic for the chat request. The participant chooses this topic.
Participant	Displays the name of the chat participant. If the chat participant starts an anonymous chat request, the name can consist of letters and numbers.
Participant address	Displays the Jabber Identifier of the participant.
Started	Displays the start time of the chat request.
Text	Displays the initial text of the chat request.
Customer name	Displays the name of the customer.

Using the Chat module

About this task

As an IP Office Contact Center agent, you can edit chat requests and use call center system functionality. With the chat module, you can change to telephony or email processing as needed.

Before you begin

- Ensure that you are configured as a chat agent.
- Ensure that you have the required privileges.

Procedure

1. To open the **Chat** module:
    - On the **Go to** menu, click **Chat**.
    - On the task bar, click the **Chat** icon.
    - On the tool bar, click the **Chat** icon.
2. To log in to an agent group, click the **Select AG** icon.
3. In the Agent group selection dialog box, mark the appropriate agent groups for Chat.
4. Click **OK**.

    The system displays the logged in status of the selected agent groups.
5. To accept a chat request, click an entry in the list view.

    The system displays the list view in active state.
6. To answer a chat request in **Chat input**, type the text.

    You can enter smilies.
7. To send text, do one of the following:
    - Click **Send**.
    - Use the **Enter** key on the keyboard.
8. To complete a chat request, click **Complete**.
9. **(Optional)** If a job code is required, then click **Job code** and select **Job code**.

Part 2: Supervision

Chapter 7: Real time Information module overview

You can provide real time information on the status of an object in the IP Office Contact Center system. You can monitor some object states in real time, and the states of other objects periodically. The states of objects are displayed alphanumerically, graphically, or in a tabular form. The system displays the **Realtime information** icon on the task bar. You can also find the Real time Information on the menu bar.

Features of the real time information module

- Configuring real time information.
- Displaying the real time information.
- Creating, changing, and deleting of real time information files.
- Managing, creating, changing, and deleting of folders and files.
- Assigning rights.

Monitoring object status

You can monitor the status of the following objects:

- Topic structured according to a task type
- Agent structured according to a task type
- Agent group structured according to a task type
- Team structured according to a task type
- PBX
- IVR

Related links

Real time information view types on page 114
File View on page 115
Viewer on page 118
Inspector on page 119
Real time information elements on page 123
Configuring the properties of elements on page 126
Text elements on page 129
Lists on page 135
Tables on page 142

[Graphics elements](#) on page 145
[Values](#) on page 162
[Saving window settings](#) on page 171
[Real time information calculation](#) on page 174
[Structure of IP Office Contact Center User Interface for Windows](#) on page 24

Real time information view types

Real time information has three different views:

Name	Description
File View	Displays the folders and associated files for real time information. You can edit the real time information files.
Inspector	Creates and edits real time information in the Inspector view.
Viewer	Displays real time information in the Viewer view.

Default monitor

The default monitor displays immediately after installation and a basic configuration. The default monitors for an agent group and a topic are predefined.

Related links

[Real time Information module overview](#) on page 113
[Real time information menu field description](#) on page 114

Real time information menu field description

Name	Description
Close "Name of Realtime Information"	Closes the current real time information.
Realtime information file list	Displays the open real time information. You can identify the current real time information with a check mark. For example: **Realtime Information 1** ☑**Realtime Information 2** **Realtime Information 3**
Autostart	Automatically opens the current real time information when you sign in the next time.

Table continues…

Name	Description
Profile autostart	Selects a profile for which you want to configure autostart real time information. For the autostart profile, all open real time information with the current position information is stored as autostart real time information.
Save Window Positions	Saves the current window position of separate real time information.

Related links

Real time information view types on page 114

File View

File View is divided into four areas:

- The title bar
- The toolbar
- The folder
- The Real time information files

The title bar displays the real time information File View.

Related links

Real time Information module overview on page 113
File view toolbar icon field descriptions on page 115
Folders and file view overview on page 116
File View icon field descriptions on page 116
Folder area pop-up menu field descriptions on page 117
File area pop-up menu field descriptions on page 117

File view toolbar icon field descriptions

Icon	Name	Description
	**New folder**	Creates a new folder.
	**New realtime information**	Creates a new real time information file.
	**Edit**	Toggles to Inspector view. You can edit the selected file in the Inspector view.
	**Duplicate**	Copies a file.

Table continues…

Icon	Name	Description
	**Delete**	Deletes the selected file or folder. You can also delete more than one file at a time.
	**Full screen**	Displays the selected file as a full screen in the Viewer view.
	**Work area**	Displays the selected real time information file in the Viewer view.
	**Separate realtime information**	Displays the selected file in a separate window in the Viewer view.

Related links

File View on page 115

Folders and file view overview

The folders area displays in a tree structure for real time information. You can use these folders to arrange and clear a layout according to the topic. You can create private or public folders.

Realtime information files

The Real time information files area displays the real time information of a selected folder. The area displays the name and type of real time information. The type indicates whether a real time information file is a private file or a public file. You can use only private folders, and users with the respective privileges can use public folders. The default Home and Telephony real time information cannot be changed. To edit real time information, you must copy the screens first.

Related links

File View on page 115

File View icon field descriptions

The following icons are used in the **Folder** and **Real time information** files area:

Icon	Name	Description
	Folder (public)	Displays a public folder.
	Folder (private)	Displays a private folder.
	File (public)	Displays a public real time information file.
	File (private)	Displays a private real time information file.

Related links

File View on page 115

Folder area pop-up menu field descriptions

Name	Description
New ▸ Folder (public)	Creates a new public folder.
New ▸ Folder (private)	Creates a new private folder.
New ▸ File (public)	Creates a new public file.
New ▸ File (private)	Creates a new private file.
Add	Pastes one or more copied or cut files in the selected folder.
Delete	Deletes the selected folder.
Rename	Renames a selected folder.
Private	Converts a public folder to a private folder, and vice versa. The conversion can also affect sub folders and files contained in the folder. When you do the conversion, the system displays a message.
Refresh	Displays the latest version of the page.

Related links

File View on page 115

File area pop-up menu field descriptions

Name	Description
Open ▸ In Work Area	Displays the selected file in the work area.
Open ▸ Full View	Displays the selected file in full view.
Open ▸ In new window	Displays the selected file in a separate window.
Edit	Toggles to the Inspector view.
New ▸ File (public)	Creates a new public file. You can name the new file.
New ▸ File (private)	Creates a new private file. You can name the new file.
Cut	Cuts the information. You can select and cut one or more files and paste in another folder.
Copy	Copies the information. You can select and copy one or more files and then paste the files in another or the same folder.
Paste	Pastes the copied files.
Delete	Deletes one or more selected files.

Table continues…

Name	Description
Rename	Renames the selected file.
Duplicate	Copies the information. You can copy the selected file in the same folder. You must rename the file.
Private	Converts a public file to a private file or vice versa.
Refresh	Refreshes the contents of the selected folder.

Related links

File View on page 115

Viewer

The Viewer displays the configured real time information in three areas:

- The title bar
- The tool bar
- The Realtime information files

The title bar displays **Viewer - <file name>**.

Related links

Real time Information module overview on page 113
Viewer tool bar icons on page 118
Editing the Viewers view on page 118

Viewer tool bar icons

Icon	Name	Description
	**Realtime information files**	Toggles the file view.
	**Edit**	Toggles the edit mode.
	**Full screen**	Toggles the full screen display.

Related links

Viewer on page 118

Editing the Viewers view

About this task

The Viewer displays the configured real time information of the Realtime information file.

Procedure

1. In the **Realtime Information files** field, select the appropriate file.
2. In the File View toolbar, click **Edit**.

   The system displays the Inspector view.

Related links

Viewer on page 118

Inspector

You can configure, change, and delete real time information elements in the Inspector view. Inspector view is divided into four areas:

- The title bar
- The tool bar
- The elements
- The real time information

The title bar displays the Inspector view and the name of the real time information.

Related links

Real time Information module overview on page 113
Inspector toolbar icons on page 119
Changing real time information properties on page 120
Inspector pop-up menu field description on page 120
Real time information properties field descriptions on page 121
Size of the work area on page 122
Default type on page 122
Real time information sheet on page 123

Inspector toolbar icons

Icon	Name	Description
	Save	Saves the real time information data.
	Cancel	Cancels the current process and data is not saved.
	Properties	Displays the properties of the real time information.

Table continues…

Icon	Name	Description
	Realtime information files	Toggles to the File View.
	Full screen	Toggles to full screen display.
	Work area	Toggles to the work area.
	Switch on selection mode	Activates the select mode.
	Draw rectangle	Activates the draw mode and you can draw a rectangle.
	Draw line	Activates the draw mode and you can draw a line.

Related links

Inspector on page 119

Changing real time information properties

About this task

Use this procedure to edit real time information properties. Real time information can consist of one or more real time information sheets.

Procedure

1. In the **Realtime Information files**, click a file.
2. In the File View toolbar, click **Edit**.
3. In the Inspector view, do one of the following:
   - Click the **Properties** icon.
   - In the real time information sheet right-click and select **Properties**.
4. Configure the properties.
5. Click **OK**.

Related links

Inspector on page 119

Inspector pop-up menu field description

You can use the elements to create the real time information in the Inspector view area. You can drag and drop the elements to create real time information. You must also enter the settings of the elements.

Name	Description
Delete	Deletes the selected element.
Properties	Opens the properties of the selected element.

You can use the following functions:

Name	Description
Mark all (Ctrl+A)	Marks all elements.
Copy (Ctrl+C)	Copies the selected element. You must save the elements before copying. Otherwise errors might occur when copying.
Paste(Ctrl V)	Pastes the selected element. The elements can overlap when pasting.

Related links

Inspector on page 119

Real time information properties field descriptions

Name	Description
Realtime information file	
Name	Displays the name of the real time information file. You can change the name of this file.
Type of default	Displays the type of default. The options are: • **None** • **Topic** • **Agent group** • **Agent** • **Team** • **Workplace** • **PBX** • **IVR**
Size of work area	Displays the size of the work area. You can configure the size between 4 and 6,000 points with the following options: • **Width** • **Height**
Realtime information sheet	
RT Information	Displays the name of the real time information sheet and the order of the real time information sheets with drag and drop.

Table continues…

Name	Description
Grid	Displays a select operation to display or hide a grid. You can define the size of the grid between 4 and 100 points with the following options: • **Width** • **Height**
Presentation	
Font	Displays a list of available fonts.
Line	Displays a list of drawing lines.
Background	Displays the following options to change the background: • **Color**: Displays the selected color. You can select a color from a palette for the following settings in color selection: - Labeling for text color. - Dividing line for line color. - Background color. • **Image**: Displays the path of the selected image.

Related links

Inspector on page 119
Changing the color, line type, and line width on page 170
Background presentation on page 126

Size of the work area

You can configure the size of the work area for real time information in the real time information **Properties** dialog box. To view real time information in full screen and to fit your monitor, configure the size of the work area according to your resolution. When the size of the work area exceeds the window size, the scroll bar is invisible.

Related links

Inspector on page 119

Default type

To create a real time information sheet for a certain type of object, you must select the correct default type in the real time information sheet properties. For example, if you select agent groups as the default type, you can create only real time information elements for agent groups on this real time information sheet.

You can then configure a real time information element, such as agent status for AG (grid). If you select agent group as <*Default*> in the properties , the system does not display agent group in

Inspector view. Specifying <*Default*> defines that an agent group is displayed in the real time information element.

You must select an agent group in the Viewer area.

Related links

Inspector on page 119

Real time information sheet

Each real time information sheet has a corresponding tab. Right-click the real time information sheet and, you can add or delete real time information sheets. You can drag and drop the real time information sheets to change the order.

Right-click the monitor sheet, and you can use the following functions to monitor leaves:

- Add RT information sheet
- Copy RT information sheet
- Insert RT information sheet
- Delete RT information sheet

Related links

Inspector on page 119

Real time information elements

To configure real time information windows, you must have real time information elements. Real time information elements display in Inspector view. You can customize a real time information window with the drag and drop option. You can edit the settings of an element.

You can use the following real time information elements with the Real time information module:

Name	Description
Text element	Label ( ) Value element ( ) Longest wait time (topic) [Telephony] ( ) Longest wait time (topic) [E-mail] ( ) Hyperlink ( ) Email to contact ( ) Out of office notice ( )

Table continues…

Name	Description
	Variable ( ) Variable ( ) Tag ( ) Tag ( )
Lists	Agent status list (AG) [Telephony] ( ) Agent status list (AG) [E-mail] ( ) Agent status list (AG) [Chat] ( ) Agent status list (team) [Telephony] ( ) Agent status list (team) [E-mail] ( ) Agent status list (team) [Chat] ( ) Queue [Telephony] ( ) Queue [E-mail] ( ) Queue [Chat] ( ) Conversations per AG (topic) ( ) Number of opened emails per AG (topic) ( ) Skill combination ( ) Abandoned call list ( )
Tables	Agent group table ( ) Dialer table ( ) Topic table ( ) IVR overview ( )
Graphics elements	Image ( ) Group ( ) Bar chart ( ) Longest Wait Time (topic) [Telephony] ( ) Longest Wait Time (topic) [E-mail] ( ) Queue (topics) [Telephony] ( ) Waiting e-mails (topics) [Email] ( )

Table continues…

Name	Description
	Individual status LED ( ) Individual status parser ( ) Pie chart ( ) Agent status (AG) ( ) Agent status (team) ( ) Phone state ( ) Active agents (AG) ( ) TSF (topic) ( ) TSF (team) ( ) Accept level (topic) ( ) Accept level per shift (topic) ( ) Network overflows [Telephony] ( )
Other elements	Agent history ( ) Remote functions ( ) Internet browser ( ) Supervisor Emergency ( )

Related links

Real time Information module overview on page 113
Displaying or hiding elements on page 125

Displaying or hiding elements

About this task

The real time information elements are arranged in the left panel of the Inspector view in a tree structure. You can display and hide real time information elements within the tree.

Procedure

1. In the **Elements** column, click the **plus** icon .

   The system expands the tree to display the elements.

2. In the **Elements** column, click the **minus** icon .

   The system collapses the tree to hide the elements.

Related links

Real time information elements on page 123

Configuring the properties of elements

Procedure

1. Right-click the element.
2. In the pop-up menu, click **Properties**.
3. In the Properties dialog box, configure the properties.

Related links

Real time Information module overview on page 113
Configuring the size elements on page 126
Background presentation on page 126
Hiding the title on page 127
Hiding the total on page 127
Configuring the column arrangement on page 127
Configuring the number of columns on page 128
Bar chart field descriptions on page 128
Configuring the presentation settings on page 129

Configuring the size elements

About this task

You cannot change the size of all real time information elements.

Procedure

1. Click the border of the element.
2. Use the mouse to drag and drop the border of the element to enlarge or reduce the size.

Related links

Configuring the properties of elements on page 126

Background presentation

You can select the background color for some real time information elements.

The **Show borders** option displays the real time information element with a border in Viewer view. You can also select a figure or image as a background for certain real time information elements.

You can select a color from a palette for the following settings:

- The labeling the text color
- The line color
- The background color

Related links

Configuring the properties of elements on page 126

Hiding the title

Procedure

1. Right-click the element, and in the pop-up menu, click **Properties**.
2. In the **Properties** dialog box, clear the **Show title** check box.
3. Click **OK**.

Related links

Configuring the properties of elements on page 126

Hiding the total

About this task

With the **Table** elements, you can display or hide total values.

Procedure

1. Right-click the element, and in the pop-up menu, click **Properties**.
2. In the **Properties** dialog box, select the **Hide total** check box.
3. Click **OK**.

Related links

Configuring the properties of elements on page 126

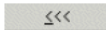
Configuring the column arrangement

About this task

You can adjust the arrangement of columns in a table. The real time information element displays the information from the list of visible information.

Procedure

1. Right-click the element, and in the pop-up menu , click **Properties**.

2. To move information from **Available information** to **Visible information**, click the **Right arrow** icon .
3. To move information from **Visible information** to **Available information**, click the **Left arrow** icon .
4. To move information in an upward direction, click **Up**.
5. To move information in a downward direction, click **Down**.
6. Click **OK**.

Related links

Configuring the properties of elements on page 126

Configuring the number of columns

About this task

You can control the number of columns automatically or define a set number of columns for some real time information elements.

Procedure

1. Right-click the element, and in the pop-up menu, click **Properties**.
2. In the Properties dialog box, in the **Number of columns**, select one of the following:
    - **Automatic**: To display the number of columns automatically.
    - **n columns**: To display the number of columns according to the specified value n.
3. Click **OK**.

Related links

Configuring the properties of elements on page 126

Bar chart field descriptions

Name	Description
Presentation	The options are: • **Font**: Modifies the font style, size, and color. • **Background**: Configures the background color.
Threshold	
Threshold values	The options are: • **Alarm**: After the value exceeds the alarm threshold, the bar color changes to red.

Table continues…

Name	Description
	Warning: After the value exceeds the warning threshold, the bar color changes to yellow. The default settings are green or blue for OK, yellow for warning, and red for alarm. You must enter a whole number value. When entering a time, you must enter the value in seconds. For example, 240 for 4 minutes.
Range	The options are: • **Min** • **Max** You can set the minimum and maximum values for the display range. The value of the real time information element is displayed within these limits. You must enter a whole number value. When entering a time, you must enter the value in seconds. For example, 240 for 4 minutes.

Related links

Configuring the properties of elements on page 126

Configuring the presentation settings

Procedure

1. Click the element.
2. In the Properties dialog box, click **Presentation**.
3. Configure the presentation settings.
4. Select **Options**.
5. Click **OK**.

Related links

Configuring the properties of elements on page 126

Text elements

The **Text elements** displays, for example, the alphanumeric statuses of the objects, the references, or the titles of areas.

Related links

Real time Information module overview on page 113

Labels

The **Label** element is a text element for titles or designating areas. You can adjust the size of the element and also change the text properties.

Example

The following is an example of a label:

Home View

Related links

Text elements on page 129

Value elements

The **Value** element is in an alphanumeric display that displays the actual value and an abbreviation of the value.

The abbreviations of the task types are:

- [T] for Telephony
- [E] for Email
- [C] for Chat

With the **Value** element, you can:

- Adjust the size.
- Select an object.
- Hide the label or abbreviation.
- Change the text properties.
- Change the background color.

Related links

Text elements on page 129

Longest wait time for multiple topics

The **Longest wait time** element displays the value for multiple topics.

The abbreviations of the task types are:

- [T] for Telephony
- [E] for Email

With the **Longest wait time** element, you can:

- Adjust the size.
- Select one or more topics.
- Hide the label or abbreviation.
- Change the text properties.
- Change the background color.

Related links

Text elements on page 129

Hyperlink

The **Hyperlink** element links multiple real time information sheets with references. If a link refers to another real time information sheet and if the sheet changes to alarm status, the system displays a signal with flashing text.

With the **Hyperlink** element, you can:

- Adjust the size.
- Change the text properties.
- Change the background color.
- Type the text to display.
- Select a real time information element file, a real time information sheet, or a URL as the link.

Related links

Text elements on page 129

Email to contact

The **Email to contact** element opens the Email module, and a new email is created in the edit mode. The fields **To** and **Subject** are automatically set with tags. You can use **Email to contact** element to send an email to the caller. For example, during a conversation or in the wrap-up time. The email address and subject are configured with tags.

With the **Email to contact** element, you can:

- Adjust the size.

  Change the text properties.

  Change the background color.
- Hide the borders.
- Tag for To: Specifies to select a tag for the recipient. The content of the tag is copied into the **To** field of the new email.
- Tag for Subject: Specifies to select a tag for the subject. The content of the tag is copied into the **Subject** field of the new email.

Related links

Text elements on page 129
Using email functions on page 132

Using email functions

About this task

Use this procedure to use Email function with all the features.

Procedure

1. Create two tags according to the following example:
   - Tag names:
     - email_contact_subject
     - email_contact_to
   - Type: Custom
   - Data type: String
2. (Optional) Set the tags in an IVR script.
3. Create a **Task flow**.

   You can create a corresponding Tasktag operation.
4. Create the **Telephony**.

   You can also set the monitor for an agent in a profile. An agent can use the function. In the customer history view, the same function can be used through a context menu (Email to create). The condition is that the customer has had an email contact and is configured as a customer.

Related links

Email to contact on page 131

Out of office notice

In the **Out of office notice** element, you can enter a notice in display mode. The input field contains more than one line and up to 254 characters. You can use this element in the agents Home or Telephony area. The supervisor can see the agents Out of office notice in the supervisor Out of office notice area.

Only a logged in agent can enter an out of office notice.

With the **Out of office notice** element, you can:

- Adjust the size.
- Select an agent, <Default> or <Logged-in user>.
- Hide the title.
- Change the text properties.

  Change the background color.
- Hide the borders.

Exit out of office notice

To change an Out of office notice for other users, you need the following privileges:

- Real time information: Out of office notice.
- Variables: Agents.

Related links

Text elements on page 129

Variable

In the **Variable** element, you can select a variable, configure a minimum and a maximum value, hide the slide control, and start a marquee. You can choose between two different presentations with name and value, or a window display.

With the **Variable** element, you can:

- Adjust the size.

  Change the text properties.
- Change the background color.
- Hide the borders.

Variable selection

A Variable selection displays:

Name	Description
Select variables	Selects a variable.
Can be edited	Displays or hides the slide control. If the slider is hidden, the real time information element displays only the numeric value.
Display as marquee	Selects the display as marquee. If the text is longer than the space available, the text is automatically presented as marquee.
Values	Specifies a minimum and a maximum value for the variable. You can change the variable in display mode.
Use horizontal slider	Displays or hides a horizontal slider.
Use vertical slider	Displays or hides a vertical slider.

Changing a variable in Display mode

The **Variable** element in display mode, displays a value. You can change the value with the slider and save the changes.

If a value is outside the valid range of values, the system displays a dialog box with the message that the entered value is invalid and that the value is corrected.

Name	Description
	Verifies the specified value. For example, the value can be used in the task flow set.
	Cancels the specified value. The system displays the last saved value.

Prerequisites

You must have the following prerequisites to change a variable:

- Set the minimum and the maximum values for the properties of the element.
- Use and evaluate the variable in the active task flow set, if the call distribution is affected by changing the variable.

Related links

Text elements on page 129
Setting values for variable elements on page 134

Setting values for variable elements

Before you begin

Start the edit mode.

Procedure

1. Right-click the element and click **Properties**.
2. In the Properties dialog box, click **Selection** > **Select variable**.
3. **(Optional)** Select **Can be edited**.
4. **(Optional)** Select **Display as marquee**.
5. In the **Values** tab, enter the minimum and maximum values.

6. **(Optional)** Select **Use horizontal slider** or **Use vertical slider**.
7. Click **OK**.

Related links

Variable on page 133

Tag display

The **Tags** element displays all tags of received calls. The system displays a tag as an informational unit that is attached to a call. A tag accompanies a call even if, for example, you forward the call. Tag information consists of values or texts. The distribution can query the information of a tag and take the tag into account. You can display and edit the value of a tag with the Tag element. In IP Office Contact Center system, there are two types of tags, namely system tags and user-defined tags. The system tags are prepared in the IP Office Contact Center system and are always attached to a call.

With the **Tag** element, you can:

- Adjust the size.
- Select a tag.
- Change the display name.
- Choose whether a value can be edited.
- Change the text properties.
- Change the background color.
- Hide the borders.

Related links

Text elements on page 129

Lists

Related links

Real time Information module overview on page 113
Agent status list on page 136
Calls in queue on page 138
Number of conversations (AG) (topic) on page 139
Number of opened emails per AG on page 140
Skill combination on page 140
Abandoned Call list on page 141

Agent status list

You can configure the **Agent status list** element for an agent group and a team for telephony, email, and chat.

With the **Agent status list** element, you can:

- Displays Realtime information.
- Adjust the size.
- Select an agent group or <Default>.
- Hide the title.
- Display information to authorized users only.
- Select the display content of all agents or only present agents.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Sorting restrictions

You can sort any column in an ascending or a descending order. Columns are organized in two groups:

- The first group displays the properties and the states of displayed agents and contains exactly one row for each agent.
- The second group displays the processed task types of each agent. An agent can process more than one task types, while the output can be more than one row for each agent.

.

You can sort columns only of the first group, because the different task types of an agent cannot be presented coherently.

Related links

Lists on page 135
Visible columns field descriptions on page 136
Display range field descriptions on page 138

Visible columns field descriptions

Visible agent columns

Name	Description
Name	Displays the agents name.
Login state	Displays the login status of agents. The options are: • **No display**: The agent is not logged in.

Table continues…

Name	Description
	• **Pres.**: The agent is logged in. • **ACD**: The agent is signed in to call distribution. • **P**: The agent is on a break.
W. state dura	Displays the current duration of the displayed state. For example, displays how long an agent has been on the phone with an ACD call.
W. state	Displays the work state of agents. The options are: • **Avail**: The agent is available. • **Busy**: The agent is busy and the number of ACD call is displayed. • **ACD**: The ACD conversation. • **Wrap Up**: The agent is finished with conversation and is on wrap up.
TNo	Displays the physical number of the terminal.
Break time code	Displays the reason code for a break.
OutOfOrder	Displays that the agent is no longer available.
Reserve	Displays the name of the agent that the task is reserved for.

Visible task columns

Name	Description
Term state	Displays the state of the terminal. The options are. • **Available**: Displays the number of calls and agents available. • **Off-hook**: Displays that the handset is off-hook. • **Call** : Displays a call. • **Conn**: Displays that a call is connected. • **Hold**: Display that the connection is on hold. • **bTone**: Displays a busy tone. • **Fault**: Displays the terminal fault.
int/ext	Displays int for an internal connection or ext for an external connection.
Directiond	Displays incom for an incoming connection or outg for an outbound connection.
ACD	Displays if the call is distributed through call distribution in ACD.
Topic	Displays the current topic that the agent is working for.
AG	Displays the current agent group that the agent is working for.
Task.dura.	Displays the current duration of the displayed terminal state.

Related links

Agent status list on page 136

Display range field descriptions

Right-click a line in the display range to open a selection box to select the following options:

Name	Description
Sign on to AG	To sign in to an agent group in Telephony and Email.
Sign out of AG	To sign out of an agent group in Telephony and Email.
Login	To log in to a telephone.
Logout	To log out from a telephone.
Out of Office	To enter an out-of-office notice in a dialog box.
Break Time	To set an agent to go for a break. You can select a break code in the submenu when required.
End Break Time	To end the break state of an agent.

Related links

Agent status list on page 136
Display range field descriptions on page 138

Calls in queue

The **Queue** element displays the calls in the queue of the selected topic. You can display the tags or information of the calls in the real time information element. The tag display retains the value when the call enters the queue and does not change when the tags are updated dynamically. For example, tag operations in the task flow.

With the **Queue** element, you can

- Displays Realtime information.
- Adjust the size.
- Change the text properties.
- Change the background color.
- Hide the title.
- Select a topic or <Default>.
- Customize the column arrangement.

Related links

Lists on page 135
Queue data field description on page 139

Queue data field description

Name	Description
No.	Displays the phone number of the caller.
Topic	Displays the dialed-in topic.
Ln	Displays the line number.
TT	Displays the time-in topic.
Announcement	Displays the kind of connected announcement. The options are: None, Interruptible, and Not interruptible.
Announc. scripts	Displays the name of a connected announcement.
TCS	Displays the time in the current state.
reserv.for	Displays the name of the agent that the entry is reserved for.
Tag	Displays the option to select one or more tags.
Address	Displays the email address of the sender.
TQueued	Displays the wait time of an email.

Related links

Calls in queue on page 138

Number of conversations (AG) (topic)

The **Number of conversations (AG) (topic)** element displays the number of established calls (TEC) for the selected topic broken down into agent groups (AG). The names of the agent groups with the respective numbers of calls are displayed in a table. The values are reset to 0 at the end of the calculated period like TSF, which is set to 100% at the end of the configured time frame. You can display an additional total line. You can choose whether to display **AG** or **TEC** in the first column.

With the **Number of conversations (AG) (topic)** element, you can:

- Displays Realtime information.
- Adjust the size.
- Select a topic or <Default>.
- Hide the title.
- Hide the total line.
- Display information to authorized users only.
- Change the text properties.
- Change the background color.

Related links

Lists on page 135

Number of opened emails per AG

The **Number of opened emails per AG (topic)** element displays the number of open emails (totNAccE) for the selected topic broken down into agent groups (AG). The names of the agent groups with the respective numbers of emails are listed in a table. The values are reset to 0 at the end of the calculated period like TSF, which is set to 100% at the end of the configured time frame. You can display an additional total line. The interval begins independent of the email activation for the number of open emails (totNaccE) counter. For example, an interval of 1 minute starts when an email activates after 40 seconds. The number of open emails (totNAccE) counter must be 1 minute only for 20 seconds. After that the counter must decrease to 0 because the system starts with another interval. You can choose whether to display **AG** or **totNaccE** in the first column.

With the **Number of opened emails per AG (topic)** element, you can:

- Displays Realtime information.
- Adjust the size.
- Select a topic or <Default>.
- Hide the title.
- Hide the total line.
- Display information to authorized users only.
- Change the text properties.
- Change the background color.

Related links

Lists on page 135

Skill combination

The **Skill combination** element displays the skill combinations.

With the **Skill combination** element, you can:

- Displays Realtime information.
- Adjust the size.
- Hide the title.
- Hide the total line.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Related links

Lists on page 135
Skill combination field description on page 141

Skill combination field description

Name	Description
request	Displays the number of requested combinations.
Skill combination	Displays all skills of the combinations.
reduc	Displays the number of reduced combinations.
new rout	Displays the number of newly routed combinations.
serv	Displays the number of served combinations.
overfl	Displays the number of overflow combinations.
n.serv	Displays the number of unserved combinations.

Related links

Skill combination on page 140

Abandoned Call list

The **Abandoned Call list** element displays the call list of the selected topic.

With the **Abandoned Call list** element, you can:

- Displays Realtime information.
- Adjust the size.
- Select a topic or <Default>.
- Hide the title.
- Hide the total line.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Related links

Lists on page 135
Call list field descriptions on page 141

Call list field descriptions

Name	Description
No	Displays the phone number of the caller.
SysAC	Displays the number of connections canceled by the system.
ExtAC	Displays the number of connections canceled by an external party before answering a call.
Date	Displays the date of the last call.

Table continues…

Name	Description
Time	Displays the time of the last call.
Callno. blocked	Displays the option of No or Yes. Yes means that the number is blocked for callback. When an agent calls the subscriber or is having a conversation with the subscriber, then the entry is blocked for a callback.
Name	Displays the name of the caller.

You can use the following functions in the call list:

Name	Description
Print	You can right-click on the call list and click **Print** in the context menu. The system displays that the entire call list is printed.

Related links

Abandoned Call list on page 141

Tables

The **Table** element displays states and values of an object, for example, agents in rows and columns. You can configure the columns with the properties of the real time information and hide the headings for tables, if required. The heading of a table displays the name of the object and the name of the real time information.

The abbreviations of the task types are:

- [T] for Telephony
- [E] for Email
- [C] for Chat

Related links

Real time Information module overview on page 113
Agent group table on page 142
Dialer table on page 143
Topic table on page 143
IVR overview on page 144

Agent group table

The **Agent group table** element lists, agent groups and the available information. You can configure different values.

With the **Agent group table** element, you can:

- Displays Realtime information.
- Adjust the size.
- Hide the title.
- Hide the total line.
- Hide the details.
- Display information to authorized users only.
- Select one or more agent groups.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Related links

Tables on page 142
Agent group values field descriptions on page 165

Dialer table

The **Dialer table** element lists, agent, topic, or campaign dialers and available information. You can configure different values.

With the **Dialer table** element, you can:

- Displays Realtime information.
- Adjust the size.
- Hide the title.
- Hide the total line.
- Hide the details.
- Select agent, topic, or campaign dialers.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Related links

Tables on page 142
Dialer field description on page 167

Topic table

The **Topic table** element lists topics and available information. You can configure different values.

With the **Topic table** element, you can:

- Displays Realtime information.
- Adjust the size.
- Hide the title.
- Hide the total line.
- Hide the details.
- Display information to authorized users only.
- Display name or number.
- Select one or more agent groups.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Related links

Tables on page 142
Topic values field description on page 162

IVR overview

The **IVR overview** element lists IVR information. You can configure different values.

With the **IVR overview** element , you can:

- Displays Realtime information.
- Adjust the size.
- Hide the title.
- Hide the total line.
- Hide the details.
- Select one or more voice units.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

Related links

Tables on page 142
IVR field descriptions on page 167

Graphics elements

You can use graphic elements to customize real time information.

Related links

Real time Information module overview on page 113
Image on page 145
Group on page 146
Bar chart on page 146
Longest Wait Time for telephony and email topics on page 147
Queue on page 147
Waiting emails on page 148
Individual status LED on page 148
Individual status parser on page 149
Pie chart on page 150
Agent status on page 151
Phone state on page 154
Chart on page 154
Network overflows on page 156
Agent History on page 157
Remote functions on page 157
Internet browser on page 160
Supervisor Emergency on page 160

Image

In the**Image** element, you can insert various graphics, images, or image elements.

The following formats are possible:

- *.bmp
- *.jpg
- *.gif
- *.png

With the **Image** element, you can:

- Adjust the size.
- Select a graphics file.
- Hide the borders.
- Choose a title.

Related links

Graphics elements on page 145

Hyperlink on page 131

Group

In the **Group** element, you can graphically combine multiple real time information elements.

With the **Group** element, you can:

- Adjust the size.
- Hide the title.
- Specify the title.
- Change the font properties.
- Change the background color.

Related links

Graphics elements on page 145

Bar chart

A **Bar chart** visualizes a value with the help of a bar. If the value exceeds a certain limit value, the system changes the bar color. The bar turns yellow in the event of a warning. The bar turns red in the event of an alarm. The threshold points display in a dotted line.

You can select the following objects:

- Topic
- Agent
- Agent group
- Team
- PBX
- IVR

With the **Bar chart** element, you can:

- Adjust the size.
- Hide the title.
- Change the font properties.
- Change the background color.
- Select an object, for example, Agent group.
- Select a value.

Enter the threshold values for alarm and warning, and the minimum and maximum values for the display range of the bar. You must enter a whole number. When entering a time, you must enter the value in seconds, for example, 240 for 4 minutes.

Related links

Graphics elements on page 145

Longest Wait Time for telephony and email topics

The **Longest Wait Time (topic)** element for Telephony and Emails displays the selected topics in the bar chart. If the value exceeds a certain limit value, the system changes the bar color. The bar turns yellow in the event of a warning. The bar turns red in the event of an alarm. The threshold points are displayed in a dotted line.

With the **Longest Wait Time (topic)** element, you can:

- Adjust the size.
- Hide the title.
- Change the font properties.
- Change the background color.
- Select topics.

Enter the threshold values for alarm and warning, and the minimum and maximum values for the display range of the bar. You must enter a whole number. When entering a time, you must enter the value in seconds, for example, 240 for 4 minutes.

Related links

Graphics elements on page 145

Queue

The **Queue** element displays the number of calls in a queue for the selected topics in bar chart. The waiting calls of all selected topics are added up.

With the **Queue (topics) [Telephony]** element, you can:

- Adjust the size.
- Hide the title.
- Change the font properties.
- Change the background color.
- Select topics.

Enter the threshold values for alarm and warning, and the minimum and maximum values for the display range of the bar. You must enter a whole number.

Related links

Graphics elements on page 145

Waiting emails

The **Waiting emails (topics) [Email]** element displays the number of selected topics in the bar chart. The system adds up the queued emails of all selected topics.

With the **Waiting emails (topics) [Email]** element, you can:

- Adjust the size.
- Hide the title.
- Change the font properties.
- Change the background color.
- Select topics.

Enter the threshold values for alarm and warning, and the minimum and maximum values for the display range of the bar. You must enter a whole number.

Related links

Graphics elements on page 145

Individual status LED

The **Individual status LED** element displays the status of a value or an object, such as an agent group. The event is displayed as an LED. If the value exceeds a certain limit value, the LED changes color and shape.

View option displays the following LED status:

Icon	Name	Description
	Green square	Displays that the status of a value or an object is within a certain limit.
	Yellow triangle	Displays a warning.
	Red circle	Displays an alarm.

With the **Individual status LED** element, you can:

- Adjust the size.
- Select an object, for example, Agent group.
- Select a value for the object, for example, the number of active agents.
- Select an agent group.
- Hide the title.
- Change the font properties.
- Change the background color.

Enter the thresholds for alarms and warnings, and also the minimum and maximum values for the displayed area of the bar. Type the values in seconds, for example, 240 for 4 minutes.

Related links

Graphics elements on page 145

Individual status parser

The **Individual status parser** element displays the status of a value or an object, such as an agent group. The event is displayed as an LED. If the value exceeds a certain limit value, the system changes the LED color.

View option displays the following LED status:

Icon	Name	Description
	Green square	Displays that the status of a value or an object is within a certain limit.
	Yellow triangle	Displays a warning.
	Red circle	Displays an alarm.

With the **Individual status parser** element, you can:

- Adjust the size.
- Hide the title.
- Enter the title.
- Change the font properties.
- Change the background color.

Related links

Graphics elements on page 145
Parser configuration field descriptions on page 149
Configuring the parser properties on page 150

Parser configuration field descriptions

You can use up to 245 characters for each option.

Name	Description
Name	Displays the name.
Warning	Displays the field to enter the values for a warning.
Alarm	Displays the field to enter the values for an alarm.
Operators	Displays the option to select different operators.
Variable	Displays the option to select different variables.

Table continues…

Name	Description
Objects	Displays the following options: • **AG** • **Topic**

Related links

Individual status parser on page 149

Configuring the parser properties

About this task

Use this procedure to configure the parser properties for a warning and to configure an alarm.

Before you begin

Start the edit mode.

Procedure

1. Right-click the real time information, and click **Properties**.
2. In the Properties dialog box, click the **Parser configuration** tab.
3. **(Optional)** Select the **Name** check box and type a name.
4. Click **Warning**.
5. In the **Objects** tab, click **AG** or **Topic**.

   The system displays a lists of different values for the objects.
6. Click the **Variable** tab.
7. In the Variable selection dialog box, double-click a value or click an object and click **OK**.
8. In the **Operators** tab, double-click an operator.

   The system displays the operator value in the **Warning** field.
9. Enter a `value`.

   You must enter a whole number. To enter a duration, specify a value in seconds, for example, 240 for 4 minutes.
10. Click **OK**.

Related links

Individual status parser on page 149

Pie chart

In the **Pie chart** element, you can display different values for individual agents or agent groups.

With the **Pie chart** element, you can:

- Adjust the size.
- Hide the title.
- Select an agent or an agent group as the object.

You can select the following values for a pie chart:

- **Overview for an agent (telephony and email)**
- **Overview for an agent group (telephony)**
- **Overview for an agent group (email)**

Pie chart colors for agent groups

You can display agent group states in different colors and also customize colors for every agent. You can define colors for system, profile, or agent states.

If no colors are defined for the agent, the system displays the profile colors. If no colors are defined for the profile, the system displays the system colors.

Related links

Graphics elements on page 145
Key and pie chart color on page 230

Agent status

A real time information grid display displays the agent status for agent group and team. A button is assigned to each agent. The color of the button indicates the state of the agent. The states displayed in the Realtime information element are preset. You can also use the buttons for special actions. For example, sign on and sign off.

With the **Agent status** element for Agent Groups and Team, you can:

- Adjust the size.
- Hide the title.
- Change the font properties.
- Select the agent group or team.
- Display information to authorized users only.
- Call an agent with a double-click.
- Display a number instead of a name.
- Select if all agents or only present agents must be listed.
- Adjust the skill filter.
- Select the number of columns.
- Select the layout.

Related links

Graphics elements on page 145

Key color field description on page 152
Agent status field descriptions on page 152
Display range field descriptions on page 138

Key color field description

The color of the keys displays the status of the agent. Key colors can be customized for every agent.

The following table is an example of the default key color setting:

Color	Status	Description
Light gray	ACD unavailable and logged out	Displays that the agent is not present and not signed in.
Gray	ACD inactive	Displays that an agent is present but not signed in.
Green	ACD active	Displays that the agent is on the phone with an established ACD call.
Yellow	ACD and non ACD available	Displays that an agent is available.
Orange	Signal status of non ACD	Displays that the agent is not on the phone with an established ACD call.

Related links

Agent status on page 151
Key and pie chart color on page 230
Display range field descriptions on page 138

Agent status field descriptions

In the display range, click the **Legend** icon to display a list of the different agent statuses. You can customize the key color for every agent.

The following table is an example of the default key color for possible agent status:

Icon	Icon color	Key Color	Status	Description
	Gray	Light gray	**Absent**	Displays that an agent is not present and is not signed in.
	Red	Light gray	**Out of service**	Displays that the telephone is out of service.
	Red	Light gray	**Call diversion set**	Displays that call diversion is set.
	Black	Gray	**Present, signed off**	Displays that an agent is present but not signed in to all agent groups.

Table continues…

Icon	Icon color	Key Color	Status	Description
	Black	Gray	**Break Time**	Displays that an agent is on a break.
	Red	Gray	**Signed off by system**	Displays that an agent was signed off due to an exceeded ring time out.
	Orange	Gray	**Wrap Up without call**	Displays that the agent is in manual Wrap Up.
	Black	Gray	**Present, non-ACD conversation**	Displays that an agent is not signed in for ACD calls and is conducting a non-ACD call.
	Black	Gray	**Present, non-ACD ringing**	Displays that an agent is not signed in and is receiving a non-ACD call.
	Black	Gray	**Present, non-ACD outgoing call**	Displays that an agent is busy with ACD calls. An agent calls a subscriber and conducts a non-ACD call.
	Black	Orange	**Non-ACD conversation**	Displays that the agent is on the phone but not with an ACD call.
	Green	Orange	**Non-ACD ringing**	Displays that an agent is receiving a call, but not on an ACD call.
	Red-orange	Orange	**Non-ACD, Wrap Up without call**	Displays that the agent is on the phone with a non-ACD call during manual Wrap Up.
	Green	Orange	**No ACD call during Wrap Up**	Displays that an agent is in Wrap Up and is executing a non-ACD call.
	Black	Orange	**Outgoing non-ACD**	Displays that an agent is logged in for ACD calls. An agent calls a subscriber and conducts a non-ACD call.
	Green	Yellow	**Available**	Displays that an agent is available.
	Red	Yellow	**ACD blocked**	Displays that an agent is blocked for ACD calls.
	Green	Green	**Wrap Up with call**	Displays that the agent is in Wrap Up for an ACD call.
	Green	Green	**ACD ringing**	Displays that an agent is receiving an ACD call.
	Black	Green	**ACD conversation**	Displays that the agent is on the phone with an ACD call.
	Black	Green	**ACD outgoing**	Displays that the agent is conducting an outbound ACD call.

Table continues…

Icon	Icon color	Key Color	Status	Description
	Green	Green	**Preview**	Displays that the dialer has routed a call to an agent.
	Gray	Green	**email in the inbox**	Displays that the agent inbox contains an email.
	Green	Green	**email being progressed**	Displays that the agent is processing an email.
	Black	Green	**email interrupted / deferred**	Displays that the agent has interrupted or deferred an email.
	Green	Green	**Logged off, email in the inbox**	Displays that the agent is logged out and has an email in the inbox.
	Green	Green	**Pause, email in the inbox**	Displays that the agent is on a break and has an email in the inbox.

Related links

Agent status on page 151
Key and pie chart color on page 230
Display range field descriptions on page 138

Phone state

In the **Phone state** for telephone group, you can choose to display the name of the customer or the telephone number. The name must be configured in the telephones.

Related links

Graphics elements on page 145
Agent status on page 151

Chart

You can use a graphic display to observe how values change with time. A graphic display displays the time on the X-axis (T) and the range of the value on the Y-axis. A curve displays the progression. The title of the graphic displays the object and the name of the real time information.

The abbreviations of the task types are:

- [T] for Telephony
- [E] for Email

With the **Chart** element , you can:

- Adjust the size.

- Hide the title.
- Select an object.
- Change the Axis label properties.
- Change the background color.
- Change the chart colors.
- Adjust the scale for the X-axis and Y-axis.

Chart configuration

You must define various options when configuring a chart.

- Active agents (AG)
- TSF (topic)
- TSF (team)
- Accept level (topic)
- Accept level per shift (topic)

Related links

Graphics elements on page 145
Realtime information tab field descriptions on page 155
Chart tab field descriptions on page 155
Axes tab field descriptions on page 156
Scaling tab field descriptions on page 156

Realtime information tab field descriptions

Name	Description
AG or Topic or Team	Displays the option to select an object or <Default>.
Show label	Displays the name of the selected title.

Related links

Chart on page 154

Chart tab field descriptions

Name	Description
Graph	Displays the following options that you can select: • **Line color** • **Fill color** • **Chart background**
Background	Displays an option to select the **Window background** color.

Related links

Chart on page 154

Axes tab field descriptions

Name	Description
Axis labels	Displays the label properties.
Axis value display	Displays the properties of the axis value display.
Axis width and color	Displays the line width and the color of the axes.

Related links

Chart on page 154

Scaling tab field descriptions

Name	Description
Y-axis	Displays the options of the Y-axis: • **No. of increments** • **No. of marks for increments**
X-axis	Displays the option to enter a time when a mark with a value displays on the X-axis. You can enter time from minimum 00:01 hour to maximum 23:59 hours. The options are: • **Value interval** • **Scale interval**

Related links

Chart on page 154

Network overflows

The **Network overflows [Telephony]** element displays the network overflow of the configured PBXs in tabular form. Individual network overflows are displayed as bars. You can set the minimum and maximum values for the limit values. The default minimum value is 0 and the maximum value is 100.

With the **Network overflows [Telephony]** element, you can:

- Displays Realtime information.
- Adjust the size.
- Hide the title.
- Hide the total line.
- Hide the details.
- Select one or more PBXs.
- Customize the column arrangement.
- Change the text properties.
- Change the background color.

- Enter limit values for the bar chart.

Related links

Graphics elements on page 145
Network overflows field descriptions on page 157

Network overflows field descriptions

Name	Description
PBX	Displays the name of the PBX.
Overfl. to X	Displays the overflow of the X PBX.
Overfl. to Y	Displays the overflow of the Y PBX.
Total	Displays the total overflows.
Hide title	Hides the title name.
Hide total	Hides the total column.
Hide details	Hides the PBX details.
Limit values bar chart	Displays the limit values. The options are: • **Minimal value**: Enter a mininum value. • **Maximum valu**: Enter a maximum value.

Related links

Network overflows on page 156

Agent History

The **Agent History** element displays the already processed customer contacts and only call center relevant contacts that are calls, emails, and chat requests. You can use the agent history in the Home and Realtime information module. All topics calls, incoming calls, outgoing calls, and topics started by the dialer calls are included for the task type telephony.

For more information about Agent history, see *System administration handbook*.

Related links

Graphics elements on page 145

Remote functions

The **Remote functions** element displays all configured agents in real time. If the agent is logged in on a terminal, the physical number of the terminal and the configured agent groups are displayed. You can also log agents in or out of agent groups, or selectively to an individual group. You can set an agent to break time. When a break time code is required, you can select a break time code from the sub menu. You can also end the break time of an agent.

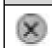
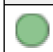
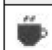
With **Remote functions** element, you can:

- Adjust the size.
- Change the font properties.

Related links

[Graphics elements](#) on page 145
[Remote function icons field description](#) on page 158
[Logging in an agent](#) on page 158
[Logging out an agent](#) on page 159
[Signing in to agent groups](#) on page 159
[Signing off from agent groups](#) on page 159

Remote function icons field description

Icon	Name	Description
	Gray circle with an x	Displays that an agent is not logged in.
	Yellow circle	Displays that an agent is logged in, but is not signed in to any agent group.
	Green circle	Displays that an agent is logged in, but is not signed in to all agent groups.
	Green circle with hook	Displays that an agent is logged in and signed in to all agent groups.
	Cup	Displays that an agent is logged in, but is on a break.

Related links

[Remote functions](#) on page 157

Logging in an agent

Before you begin

Get access to the Remote functions privilege.

Procedure

1. Right-click the agent.
2. Click **“agent” log in**.
3. In the Telephone selection dialog box, click one of the following:
   - **terminal**
   - **telephone number**

   The system displays a list of all physical numbers of the terminals. Busy terminals are not listed.
4. Click **OK**.

   The system displays that the agent is logged in to the terminal.

Related links

Remote functions on page 157

Logging out an agent

Procedure

1. Right-click the agent.
2. Select **Log out "agent”**.

   The system displays that the agent is logged out.

Related links

Remote functions on page 157

Signing in to agent groups

About this task

Use this procedure to log in an agent to all assigned agent groups or a specific agent group.

Before you begin

Get the Remote functions privilege.

Procedure

1. Right-click the agent.
2. Click **Sign on "agent" to all AGs**.

   The system automatically logs in the agent to all assigned agent group.
3. To log in to specific agent groups, right-click the agent.

   The system displays a menu of all agent groups. A check mark in the menu displays that the agent is already logged in to that agent group.
4. In the agent menu, select the respective agent groups.

   The system displays that the agent is logged in to the selected agent groups, which is indicated by a green circle.

Related links

Remote functions on page 157

Signing off from agent groups

About this task

Use this procedure to log out an agent from all assigned agent groups or specific agent group.

Procedure

1. Right-click the agent.
2. Click **Sign off agent** from all agent groups.

The system automatically logs out the agent.

3. To log out from specific agent groups, do the following:
   a. Right-click the agent.
   b. In the agent menu, clear the check box for the appropriate agent groups.

      The system logs out the agent from the selected agent groups.

Related links

Remote functions on page 157

Internet browser

You can add an **Internet browser** to real time information. You can specify a fixed URL or determine the URL with a tag. You must install Microsoft Internet Explorer 6.0 or later to use the **Internet browser** contact element.

Format for URL

You can enter a fixed URL. For example: `http://www.avaya.com/`.

You can also read the URL from a tag. Use the following format for the URL tag:

xyz%TAGNAME%xyz

You can add URLs. For example, if there is one URL for each topic, conversation guidelines can be conveniently displayed. Example:`http://www.avaya.com/product/%c.dialledTheme%/Guidelines.html`.

With the **Internet browser** element, you can:

- Adjust the size.
- Hide the title.
- Enter a URL or read it from a tag.

Related links

Graphics elements on page 145

Supervisor Emergency

An agent can request supervisor support during a call. The **Supervisor Emergency** element has two types of support, silent monitoring and active participation in the call.

A supervisor in the IP Office Contact Center system monitors more than one agent. The **Supervisor Emergency** element notifies the supervisor of the agents that require support.

The IP Office Contact Center User Interface for Windows application activates a signal on the supervisor interface when an agent requests supervisor support. If the supervisor is available, the agent can get supervisor assistance. A supervisor can only provide active support to one agent at a time.

Important:

Supervisor Assistance and Coaching is not currently supported in IP Office Contact Center.

With the **Supervisor Emergency** element, you can:

- Adjust the size.
- Hide the title.
- Insert or delete the agent groups or agents, and sort them up or down in a sequence.
- Select the display content of all agents or only the agents present.
- Set or automatically display the number of columns.
- Change the font properties.
- Change the background color.
- Use a scroll bar.

Related links

Graphics elements on page 145
Key color of agent status field description on page 161
Supervisor display range field descriptions on page 161

Key color of agent status field description

Name	Description
Gray	Displays that support is not requested by the agent.
Orange	Displays that an agent requires support.
Green	Displays that the supervisor is assisting the agent.

Related links

Supervisor Emergency on page 160

Supervisor display range field descriptions

Name	Description
Silent Monitoring	Enables the supervisor to monitor the active conversation of an agent. Neither agent nor caller can hear the supervisor with the Silent monitoring function.
Emergency	Enables the agent to request assistance from the supervisor. The supervisor can take part in the conversation using the Emergency function.

Related links

Supervisor Emergency on page 160

Values

You must select values for the following realtime information elements:

- Value elements
- Bar chart
- Individual status element

Related links

Real time Information module overview on page 113
Topic values field description on page 162
Agent values field descriptions on page 164
Agent group values field descriptions on page 165
Team field description on page 166
PBX field description on page 167
IVR field descriptions on page 167
Dialer field description on page 167
Lines field description on page 168
Inserting and deleting objects on page 169
Drawing a line on page 169
Drawing a rectangle on page 170
Switching on the selection mode on page 170
Changing the color, line type, and line width on page 170
Selecting and deleting drawn elements on page 171

Topic values field description

Name	Description
NQueued[T]	Displays the number of calls waiting in Telephony.
maxTQueued[T]	Displays the maximum wait time in Telephony.
avgTQueued[T]	Displays the average wait time of calls in the queue in Telephony.
avgTQueuedInterv[T]	Displays the average wait time during the period under consideration or interval in Telephony.
totNAbanDyn[T]	Displays the number of unanswered calls during the period under consideration or dynamic calculation in Telephony.
totNAbanInterv[T]	Displays the number of unanswered calls during the period under consideration with reference to an interval in Telephony.
TSFDyn[T]	Displays the task service factor with reference to dynamic calculation in Telephony.
TSF[T]	Displays the current Task Service Factor in Telephony.

Table continues…

Name	Description
totNTSF[T]	Displays the total number of calls for Task Service Factor calculation that is for Telephony.
totNTSF+[T]	Displays the total number of positive calls for Task Service Factor calculation in Telephony. Positive calls are calls that resulted in a discussion.
totNdoneInterv[T]	Displays the number of processed tasks during the period under consideration or updated periodically in Telephony.
totFDoneInterv[T]	Displays the processing factor. Ratio of processed to deleted tasks during the period under consideration or updated periodically in Telephony.
totNDoneShift[T]	Displays the number of conversations in each shift in Telephony.
totNNewShift[T]	Displays the number of calls in each shift in Telephony.
totNtransExtDestShift[T]	Displays the number of all received calls transferred to another topic by an external destinations in each shift in Telephony.
totNDoneExtDestShift[T]	Displays the number of conversations with external destinations in each shift in Telephony.
totNExtDestShift[T]	Displays the number of calls with external destinations in each shift in Telephony.
totNOverload[T]	Displays the overload in each shift in Telephony.
NReserved[T]	Displays the number of reserved tasks in Telephony.
NVoiceMails[T]	Displays the number of voice mails.
totTVoiceMails[T]	Displays the total length of voice mails.
NQueued [E]	Displays the number of queued emails.
NQueued [C]	Displays the number of queued chat requests in Chat.
maxTQueued[E]	Displays the maximum wait time for email.
maxTQueued[C]	Displays the maximum wait time for Chat requests in Chat.
avgTQueued[E]	Displays the average wait time of all queued emails
avgTQueued[C]	Displays the average wait time of all queued chat requests in Chat.
avgTQueuedInterv[E]	Displays the average wait time during the period under consideration or interval in Email.
TSFDyn[E]	Displays the Task Service Factor that is dynamic calculation in Email.
TSFDyn[C]	Displays the Task Service Factor that is dynamic calculation in Chat.
TSF[E]	Displays the Task Service Factor in Email.
TSF[C]	Displays the Task Service Factor in Chat.
totNTSF[E]	Displays the total number of emails for the Task Service Factor calculation in Email.

Table continues…

Name	Description
totNTSF+[E]	Displays the total number of positive emails for the Task Service Factor calculation in Email. Positive emails are closed emails.
totNDoneInterv[E]	Displays the number of processed tasks during the period under consideration that is updated periodically in Email.
totFDoneInterv[E]	Displays the processing factor. Ratio of processed to deleted tasks during the period under consideration that is updated periodically in Email.
TSFShift[T]	Displays the service level over the shift in Telephony.
avgTConvWaitShift[T]	Displays the average speed of answer in each shift in Telephony.
totNAbanShift[T]	Displays the abandoned calls in each shift in Telephony.
avgTAbanWaitShift[T]	Displays the average time that the callers waited before the call was abandoned in Telephony.
AcceptLevel[T]	Displays the acceptance level in Telephony.
NQueuedAnnNotInt[T]	Displays the number of waiting calls with none interruptible announcement in Telephony.
AcceptLevelShift[T]	Displays the acceptance level of the whole shift in Telephony.
totNAbanOutCCShift[T]	Displays the number of abandoned outgoing calls each shift in Telephony.
totNOutCCShift[T]	Displays the number of calls each shift in Telephony.
totNDoneOutCCShift[T]	Displays the number of conversations each shift in Telephony.

Related links

Values on page 162

Agent values field descriptions

Name	Description
totNDoneShift[T]	Displays the total number of conversations in each shift in Telephony.
totNNewShift[T]	Displays the total number of calls in each shift in Telephony.
totTBreakShift[T]	Displays the total break time in each shift in Telephony.
totNdoneShift[E]	Displays the total number of incoming emails in each shift in Email.
avgTBreakShift[T]	Displays the average of break time in each shift in Telephony.
totTSignOnShift[T]	Displays the total time for a shift during which an agent is signed on in Telephony.
avgTConvShift[T]	Displays the average ACD conversation time in each shift in Telephony.

Table continues…

Name	Description
totTConvShift[T]	Displays the total ACD conversation times in each shift in Telephony.
avgTWrapUpShift[T]	Displays the average Wrap Up (after call work) in each shift in Telephony.
totTWrapUpShift[T]	Display the total Wrap Up in each shift in Telephony.
avgNConvPerHourShift[T]	Displays the average number of ACD conversations in each hour related to the time in which an agent signs on to each shift in Telephony.
totNAbanOutCCShift[T]	Displays the total number of outgoing ACD calls which were unanswered by the destination.
totNOutCCShift[T]	Displays the total number of outgoing ACD calls. The calls which started in the actual shift by the agent in dial pad in contact bar or has call back from an abandoned list in real time information.
totNDoneOutCCShift[T]	Displays the total number of calls answered by a destination.

Related links

Values on page 162

Agent group values field descriptions

Name	Description
NSignOn[T]	Displays the number of signed-on agents in Telephony.
NFree[T]	Displays the number of available agents in Telephony.
NAct[T]	Displays the number of active agents in Telephony.
NNew[T]	Displays the number of calls through call distribution in Telephony.
NAcc[T]	Displays the number of conversations through call distribution in Telephony.
NWrapUp[T]	Displays the number of agents in wrap up in Telephony.
NFJCode[T]	Displays the number of agents with mandatory job code in Telephony.
NBreak[T]	Displays the number of agents on break in Telephony.
avgNFree[T]	Displays the average number of available agents in Telephony.
avgNAct[T]	Displays the average number of active agents in Telephony.
avgNNew[T]	Displays the average number of calls through call distribution in Telephony.
avgNAcc[T]	Displays the average number of conversations through call distribution in Telephony.

Table continues…

Name	Description
avgNWrapUp[T]	Displays the average number of agents in wrap-up time in Telephony.
avgNFJCode[T]	Displays the average number of agents with mandatory job code in Telephony.
NSignOn[E]	Displays the number of signed-on agents in Email.
NFree[E]	Displays the number of available agents in Email.
NAct[E]	Displays the number of active agents in Email.
NNew[E]	Displays the number of agents with unopened Emails.
NAcc[E]	Displays the number of agents with open Emails.
avgNFree[E]	Displays the average number of available agents in Email.
avgNAct[E]	Displays the average number of active agents in Email.
avgNNew[E]	Displays the average number of agents with unopened Emails .
avgNAcc[E]	Displays the average number of agents with open Emails.
NBreak[E]	Displays the number of agents on break in Email.
Nact[C]	Displays the number of active agents in Chat.
Npause[C]	Displays the number of agents on break in Chat.
Nfree[C]	Displays the number of available agents in Chat.
Nsignon[C]	Displays the number of signed-on agents in Chat.

Related links

Values on page 162

Team field description

Name	Description
TSF[T]	Displays the current TSF in Telephony.
totNTSF[T]	Displays the total number of calls in TSF calculation.
totNTSF+[T]	Displays the total number of positive calls for TSF calculation in Telephony. Positive calls are calls that resulted in a discussion.
TSF[E]	Displays the current TSF in Email.
totNTSF[E]	Displays the total number of email TSF calls for TSF calculation.
totNTSF+[E]	Displays the total number of positive emails for the TSF calculation. Positive emails are closed emails.

Related links

Values on page 162

PBX field description

Name	Description
NConfConnections[T]	Displays the number of configured B-channels for each PBX in Telephony.
NActConnections[T]	Displays the number of active B-channels for each PBX in Telephony.

Related links

Values on page 162

IVR field descriptions

Name	Description
NBusyIVRPorts	Displays the number of assigned IVR ports.

Related links

Values on page 162

Dialer field description

Name	Description
curDialFactor	Displays the current dial factor in percentage.
curDroprate	Displays the current drop rate in percentage.
%CompletedJobs	Displays the share of processed jobs.
NAbandonedJobs	Displays the number of connections canceled by an external party before answering the call.
NBusyDestJobs	Displays the number of calls in which the external party was busy.
totNJobs	Displays the total number of jobs.
NInitJobs	Displays the number of started jobs.
maxDroprate	Displays the configured default value for drop rate in percentage.
NCanceledJobs	Displays the number of dial attempts canceled because of exceeded ring time out.
NDroppedJobs	Displays the number of connections canceled by the system.

Table continues…

Name	Description
NUnfinishedJobs	Displays the number of unfinished jobs.
NTriesJobs	Displays the number of dial attempts.
NClosureJobs	Displays the number of closures.
NRPCJobs	Displays the number of Right Party Contacts.
NRawJobs	Displays the number of jobs that are not dialed by the dialer.

Related links

Values on page 162

Lines field description

Name	Description
NAvailableTrunks	Displays the number of free lines.
NBusyTrunks	Displays the number of busy lines.
NOutOfServiceTrunks	Displays the number of faulty lines.
NExtACDIncoming	Displays the number of busy lines with incoming external ACD calls.
NExtIncoming	Displays the number of busy lines with incoming external direct calls.
NExtACDOutgoing	Displays the number of busy lines with outgoing external ACD calls.
NExtOutgoing	Displays the number of busy lines with outgoing external direct calls.
NIntACDIncoming	Displays the number of busy lines with incoming internal ACD calls.
NIntIncoming	Displays the number of busy lines with incoming internal direct calls.
NIntACDOutgoing	Displays the number of busy lines with outgoing internal ACD calls.
NIntOutgoing	Displays the number of busy lines with outgoing internal direct calls.

Related links

Values on page 162

Inserting and deleting objects

About this task

You can insert or delete one or more objects in a real time information element. You can also customize the order. The objects are:

- Topics
- Agents
- Agent groups
- Teams
- PBXs
- IVR
- Campaigns, agent dialers, or topic dialers
- Lines
- Workplaces

Procedure

1. Use the mouse to drag and drop the element on to a real time information sheet.
2. To insert an object in the real time information element, in the Properties dialog box, click **Add**.
3. In the Topic selection dialog box, click the appropriate objects.
4. Click **OK**.

   The system displays the inserted topics.
5. To delete topics, click the appropriate objects and click **Delete**.
6. To change the order of the topic list, click the object, and do one of the following:
   - To move the object down the list, click **Down**.
   - To move the object up the list, click **Up**.

Related links

Values on page 162

Drawing a line

About this task

Use this procedure to configure a real time information sheet using lines and rectangles in addition to elements. You can use the grid to draw horizontal or vertical lines. You can select more than one elements, lines, and rectangles and move them together, but you cannot group them permanently.

Procedure

1. On the menu bar of Inspector view, click the **Draw line** icon .
2. On the sheet, use the mouse to draw a line.

   The system displays the drawn line.

Related links

[Values](#) on page 162

Drawing a rectangle

Procedure

1. On the menu bar of Inspector view, click the **Draw rectangle** icon .
2. To position a corner, click within the window and keep the mouse button pressed.
3. Drag the rectangle to the required size, and release the mouse button.

   The system displays the drawn rectangle.

Related links

[Values](#) on page 162

Switching on the selection mode

About this task

Use this procedure to toggle from the draw mode to the selection mode.

Procedure

1. On the menu bar of Inspector view, click the **Switch on selection mode** icon .
2. To toggle to the draw mode, click **Switch on selection mode** again.

Related links

[Values](#) on page 162

Changing the color, line type, and line width

About this task

Use this procedure to change the color, line type, and line width of the drawn elements.

Procedure

1. Right-click a drawn element.

2. In the pop-up menu, click **Properties**.
3. In the Properties dialog box, in the **Line type** field, click the line icon.
4. In the **Line width** field, click a line width. The range is from 0.5 point to 6 point.
5. Click the **Color** icon.
6. In the **Color selection** menu, click a color.

Related links

Values on page 162

Selecting and deleting drawn elements

About this task

You can select several elements to move or edit in one step.

Procedure

1. Use the mouse to drag and drop the required elements to the work area.
2. Do one of the following:
   - Keeping the Ctrl key pressed, click the required elements.
   - Draw a selection frame around the required elements.
3. To delete the drawn elements, do the following:
   a. Right-click the drawn element.
   b. In the pop-up menu, click **Delete**.
   c. Click **Yes**.

      The system deletes the selected drawn element.

Related links

Values on page 162

Saving window settings

You save your settings you have positioned all windows as required. These settings are only useful for displaying real time information separately.

You can detach a monitor. The monitor must not appear in the window of IP Office Contact Center User Interface for Windows application. The system displays a monitor as a detached or a separate entity.

You can only use the IP Office Contact Center User Interface for Windows application as a display with a single sign-on and AutoStart monitors. The monitors are always in the foreground, and you cannot minimize or close the monitors.

Related links

Real time Information module overview on page 113
Working with detached monitors on page 172

Working with detached monitors

Procedure

1. Select a monitor to detach.
2. Click **File** > **Open** > **In the same Window**
3. Click **Save**.

Related links

Saving window settings on page 171
Detached monitor field descriptions on page 172
Update types for real time information on page 173
Saving the settings of the current window arrangement on page 173

Detached monitor field descriptions

You can set the following properties in the system menu field of a detached monitor in addition to the usual Windows functions. This must limit the usual Windows functions.

If the system displays a check mark, you can use the function.

Name	Description
Always in the foreground	Indicates that the monitor must always remain visible in the foreground, even if you use another Windows application. Avaya recommends that, only important monitors remain in the foreground. You can adjust the size of the monitor.
Prevent minimization	Prevents the monitor to minimize.
Prevent closing	Prevents the monitor to close. When you exit the IP Office Contact Center User Interface for Windows application, the monitor also closes.

Possible Field of Application

You can only use the IP Office Contact Center User Interface for Windows application as a display with a single sign-on and AutoStart monitors. The monitors are always in the foreground, and you cannot minimize or close the monitors.

Related links

Working with detached monitors on page 172

Update types for real time information

The values and states of real time information elements can be displayed either periodically or as a sliding window, depending on the real time information element.

Real time display

The system updates the real time information continuously. The values match the current values in the IP Office Contact Center system. A real time information element logs on to the Real time Information server. Information and values are sent from the real time information server to the real time information element if a change occurs. The real time information element then displays the changed information or values.

Periodic update

The system updates the information and values after 10 seconds in a periodic update. The period of 10 seconds is predefined for the IP Office Contact Center system and cannot be changed. The Configuration application system displays this time. You can use periodic update for tabular real time information.

Sliding window

Sliding window means that after each update interval the calculated period of time moves one update interval. A period of 10 seconds is set for the update interval of IP Office Contact Center system. You cannot change the update interval. You can configure the calculated period of time with the Configuration application.

Example

The following example displays the progress of a sliding window with stop and start time. The following settings apply: Calculated period of 15 minutes that is updated at an interval of 10 seconds.

Calculation	Start	Stop
1.	11:00:00 AM	11:15:00 AM
2.	11:00:10 AM	11:15:10 AM
3.	11:00:20 AM	11:15:20 AM

Related links

Working with detached monitors on page 172

Saving the settings of the current window arrangement

About this task

The real time information that is currently on display opens automatically the next time that you sign in with the same settings.

Procedure

Do one of the following:

a. Click **Save Window positions**.

b. Click **Autostart**.

The system saves the window arrangement.

Related links

Working with detached monitors on page 172

Real time information calculation

Real time information displays different current and average values. To assess these values, you must know how the IP Office Contact Center User Interface for Windows application calculates these values. You must know how average values are calculated, what is TSF and TSFDyn, and how they are calculated.

Conditions for certain calculations are configured in the Configuration module.

Average values have a fixed update interval of 10 seconds. Individual values are recorded every second. The system determines and updates the average at the end of the update interval.

The formula for the average values is:

```
A = (V1+V2+V3+V4+V5+V6+V7+V8+V9+V10)/I
```

Name	Description
A	Calculated average.
V1 to V10	Individual values that are recorded every second.
I	Update interval that is 10 seconds.

Wait time

The wait time of a task depends on the task type.

- Wait time for calls: The wait time of a call starts from the time that the call is queued in the topic queue.
- Wait time for emails: The wait time of an email starts from the that time the mail arrives in the topic mailbox.

Acceptance Level

The formula for the acceptance level is:

Incoming calls / (received calls - short calls)

A call without a conversation with a waiting time <N sec [default: 10 sec] is defined as a short call.

Related links

Real time Information module overview on page 113
TSF calculation on page 175
TSFDyn calculation on page 175

TSF calculation

The Task Service Factor (TSF) displays the percentage of tasks that waited in a queue for less than or equal to the wait time threshold. The wait time threshold for the TSF is configured in the Configuration module for topics, agent groups, and teams. Different thresholds can be set for each topic, agent group, or team. The threshold can be set between 5 and 900 seconds which is 15 minutes. All tasks that are waiting in the queue for longer than the calculated period set, are taken into account for the Task Service Factor.

In contrast to the TSFDyn, the TSF is reset to 100% after each calculated period. The calculated period is valid for the entire IP Office Contact Center system.

The TSF is recalculated and updated after each update interval. The fixed update interval for the call center is 10 seconds.

The formula for the TSF is:

TSF = N / S * 100

Name	Description
TSF	Task Service Factor.
N	Number of tasks less than or equal to the wait time threshold during the calculated period of time.
S	Total of all tasks during the calculated period of time.

Related links

Real time information calculation on page 174

TSFDyn calculation

The Dynamic Task Service Factor (TSFDyn) displays the percentage of tasks that waited in a queue for less than or equal to the wait time threshold. The wait time threshold for the TSFDyn is configured in the Configuration module for topics and agent groups. Different thresholds can be set for each topic or agent group. The threshold can be set between 5 to 900 seconds which is 15 minutes.

A TSFDyn of 75% means that during the calculated time, 75% of all tasks were in the queue for a time less than or equal to the defined wait time threshold. All tasks that have been waiting longer than the calculated period set in the queue, are taken into account for the TSFDyn. The calculated period is valid for the entire IP Office Contact Center system.

TheTSFDyn is updated after each update interval. The fixed update interval for the IP Office Contact Center system is 10 seconds. The TSFDyn is a sliding window that is updated after every interval of 10 seconds. The calculated period moves along the time axis for one update interval.

The formula for the TSFDyn is:

TSFDyn= N / S * 100

Name	Description
TSFDyn	Task Service Factor (Dynamic calculation).
N	Number of tasks less than or equal to the wait time threshold during the calculated period of time.
S	Total of all tasks during the calculated period of time.

Related links

Real time information calculation on page 174

Chapter 8: Reporting module overview

The Reporting module records, examines, assesses, and presents all important IP Office Contact Center system data. You can generate reports manually or automatically in many layouts and outputs.

Reporting data

IP Office Contact Center provides detailed information about important events in the form of report data. Additional report data is calculated from agent statuses, emails, voice mail messages, and announcements.

Reporting evaluates the performance of the IP Office Contact Center system and calculates agent hours to bill clients. You can also process the report data by using staff planning tools. For example, using xstat_srv or other business programs.

Reporting gathers and classifies numeric data and other information, such as job codes and skill combinations for defined objects such as agents, topics, and agent groups. You can also create records of individual telephone conversations using tr_Srv. You can display and process the data that you collect using reporting.

The database stores all report values. The recorded data is the basis for further evaluations or special algorithms. You can collect data and evaluate results using the report generator server and report viewer components.

Advantages of reporting

You can use reporting to:

- Ensure continuous quality of service. You can also identify peak times that can be counteracted by the coordinated employment of staff.
- Use the previous evaluation as a basis to address seasonal or event-related increases in customer requests.
- Record feedbacks about promotions and marketing measures.
- Determine the time needed for processing a service. You can also use this information to calculate expenses.

Reporting types

You can create report evaluations for different objects of the system.

- Agent reporting
- Agent group reporting
- Telephone reporting
- Dialer reporting
- Skill combination reporting

- System reporting
- Team reporting
- Topic reporting
- IVR reporting

Reporting types

The reporting types are:

- Manual Reporting: You can configure manual reporting that the user must start individually.
- Automatic Reporting: The evaluation of an automatic report starts automatically at a set date or at certain intervals. For example, every evening or at the beginning of each month.

You can activate reporting for two different user groups:

- Private: You can enable reporting only for the user who defines the reporting. This report type is marked with the private-enable option.
- Public: You can enable reporting as public, so that all users with privileges can view the configured report type.

You must define a time frame for the report survey. The available options are Months, Weeks, Days, Total period, and User-defined time in hours and minutes.

The system displays the presentation in:

- Tabular format: The report displays as a table. The system determines the order of the events by custom grouping of the reporting counters used.
- Graphical display: The report displays as a line graph, bar chart, or pie chart. However, this presentation is not possible for all agent groups and topic counters.

IP Office Contact Center can generate report results in the following formats:

- Display: The system displays the result.
- Export reporting: You can export your results to a Microsoft Excel, RTF, PDF, or .CSV file.

For more information about active reporting type, see *Administering Avaya IP Office Contact Center Configuration Module*.

Reporting methods

You can select between interval-based and back office reporting in the system.

Note:

You must make the selection when commissioning the system. You must not use both reporting methods together.

Interval-based reporting

In interval-based reporting, counters are presented as events on the time axis. If a counter exceeds the interval, the counter counts proportionally for each interval. Logical totals are necessary to determine the actual number of events, such as totNNew and totNConv, and for the period under consideration. Within an interval, you can cross check the counters according to specific rules, and the system saves actual time such as ring times and conversation times.

Back office reporting

In back office reporting, all report values, such as counters, times, and job codes, are determined for the report interval. IP Office Contact Center recognizes a call the first time during the report interval. However, the time that exceeds the duration of interval is written as the first interval. For this event, the system does not record report data for further intervals.

Special cases are consultation calls with or without transfer. The system creates a new call for the consultation call. The consultation call does not need to start in the same interval as the original call. All report values for the consultation call and a possible transfer are recorded for the interval in which the system starts the consultation call. Back office reporting does not require the logical totals because the technical total and logical total for back office reporting are the same.

Conditions for calls and conversations

You must take into account the calculated period when you count calls and conversations.

For interval-based reporting evaluation, you must select the resolution of the time axis and the calculated period. You must follow this condition for all calculations. This condition also applies to the subtotal, total data, and exported data.

Times

The following table explains the time calculation:

Times	Description
Calculated period of time	The calculated period is set in the Configuration module. The system saves the data after each calculated period and determines the resolution of the data.
Resolution of time axis	You can configure months, weeks, days, total period, or user-defined hours and minutes as the time axis resolution. The minimum value is the maximum calculated period within the period that you select.
Duration of call, ring time, conversation, Wrap Up, total processing time, conversation time, calls in the queue, and calls on hold	When a counter measures a duration, these counters count in the periods in which the event occurs for interval-based reporting or in the first period under consideration for back office reporting.

Number

The following table explains the calculation of totals in interval-based reporting:

Name	Description
Calls	Calls are counted for the calculated periods, during which the calls are connected to a terminal. If a call connects during two calculated periods, the call is counted for both.
Conversations	Conversations count for the calculated periods during which the conversations occur. If a call continues for more than one calculated period, conversations counts for all periods. You must take this count into account for technical subtotals and totals. Logical totals display the number of established calls because the whole period under consideration is taken into account for logical calculations. Only the duration of conversation during the period under consideration is taken into account.
Calls in the queue	Calls in a queue are counted for the calculated periods during which the calls are queued.
Calls on hold	Calls on hold are counted for the calculated periods during which the calls are on hold.

Back office reporting

In back office reporting, totals are assigned to the period in which the call enters the system.

Reporting calculation

System calculations can result in misinterpretations. Therefore, you must learn how average values, subtotals, and totals are calculated.

Maximum values refer to the period under consideration in relation to the resolution of the time axis.

Average calculations refer to the period under consideration in relation to the resolution of the time axis. To calculate the average statistical subtotals and totals, use the following formula:

- Ø total = (Ø subtotal 1 + Ø subtotal 2 + Ø subtotal n) / n

Misinterpretations

Average subtotals and totals are not calculated according to the following formula:

- Ø total = (total of n individual values) / n

Example of how average values are calculated

The following example displays the calculation of the average ring time. If you divide the total of ring times by the total of calls, the average value is 6.67. However, the Reporting application calculates the average value of the individual average values and so the average is 6.25.

Period under consideration	Counted and calculated are			
	totNNew <-RC	totNConv <-RC	totTRingAg <-RC	Avg. Tring <-RC

Table continues…

10:00 to 11:00	2	1	15	7.5
11:00 to 12:00	1	1	5	5
Total			20	6.25
	Number		Minutes	Minutes

Simple report calculation example

The assumptions and prerequisites are:

- Create reporting for a team with two agents.
- Consider the time period from 10:00 a.m. to 11:00 a.m.
- Set the period to calculate to 1 hour.
- Set the resolution of time axis to Total period.
- Assume that during the time period that you consider the system processes one call.
- Assume that the conversation lasts for 30 minutes during the period under consideration. The call rings from 10:20 a.m. to 10:25 a.m. The conversation starts at 10:25 a.m. and ends at 10:55 a.m.

Counters for simple reporting

An example of the counters for the evaluation of simple reporting:

Na.m.e	Description
totNNew<-RC	Number of calls
totNConv<-RC	Number of conversations
totTRing<-RC	Ring time
AvgTRing<-RC	Average ring time
maxTRing<-RC	Maximum ring time
totTConv<-RC	Conversation time
maxTConv<-RC	Maximum conversation time

Table for simple reporting

Evaluations for the period under consideration from 10:00 to 11:00 are:

Period under considerati on	Counted and calculated are						
	totNNew <-RC	totNCon v<-RC	totTRi ng <-RC	AvgTRi ng<-RC	maxTRi ng<-RC	totTCon v<-RC	maxTCo nv<-RC
10:00 to 11:00	1	1	5	5	5	30	30
	Number		Minutes				

Reporting time calculation example

An example of reporting time calculation explains how to count ring times, calls, established calls, established conversations, and conversation times.

The prerequisites and assumptions for this example are:

- Create reporting for a team with two agents.
- Consider the time period from 10:00 a.m. to 12:00 p.m.
- Set the period to calculate to 1 hour.
- Set the resolution of time axis to Total period.
- Assume that during the time period that you consider, the system processes two calls.
- Assume that the conversation lasts for 30 minutes during the period under consideration. The call rings from 10:35 a.m. to 10:45 a.m. The conversation starts at 10:45 a.m. and ends at 11:15 a.m.
- Assume that the second call rings from 10:55 a.m. until 11:05 a.m. and the call is unanswered.

Counters for reporting time calculation

Name	Description
totNNew<-RC	Number of calls
totNConv<-RC	Number of conversations
totTRing<-RC	Ring time
AvgTRing<-RC	Average ring time
maxTRing<-RC	Maximum ring time
totTConv<-RC	Conversation time
maxTConv<-RC	Maximum conversation time

Table for reporting time calculation in interval reporting

When you use interval reporting, the system evaluates the following for the different periods:

Period under consideration	Counted and calculated are						
	totNNew<-RC	totNConv<-RC	totTRing<-RC	AvgTRing<-RC	maxTRing<-RC	totTConv<-RC	maxTConv<-RC
10:00 to 11:00	2	1	15	7.5	10	15	15
11:00 to 12:00	1	1	5	5	5	15	15
10:00 to 12:00	2	1	20	10	10	30	30
	Number		Minutes				

Note:

Note how the average ring time (ØTRing<-) and the conversation time (totTConv<-) depend on the period under consideration chosen for evaluation.

Table for reporting time calculation in back office reporting

When you use back office reporting, the system evaluates the following for the different periods:

Period under consideration	Counted and calculated are						
	totNNew<-RC	totNConv<-RC	totTRing<-RC	AvgTRing<-RC	maxTRing<-RC	totTConv<-RC	maxTConv<-RC
10:00 to 11:00	2	1	20	10	10	30	30
11:00 to 12:00	0	0	0	0	0	0	0
10:00 to 12:00	2	1	20	10	10	30	30
	Number		Minutes				

Counters overview

Verifying reporting counters provides formulas and calculations for the respective counters. You can verify the counters only if you meet the following prerequisites:

- Interval reporting: You cannot verify counters within the intervals. You can only verify counters of an evaluation for a total period and in the logical total.
- Back office reporting: You can verify the counters within intervals.

Counters for topic reporting

Number of calls to the topic balance sheet:

```
totNIncome = totNSucc + totNLost
```

```
totNNew + totNRr = totNConvAg + totNConvExtDest + totNConvAutoAg +
totNAban + totNRouted->
```

Number of topic calls routed to agents:

```
totNAg = totNConv + totNAbanAg
```

Number of topic calls routed to external destinations:

```
totNExtDest = totNConvExtDest + totNAbanExtDest
```

Counters for agent groups

```
totN = totNNew + totNOverf<- = totNConv + totNAban + totNOverf->
```

```
totNAban = totNAbanWait<=N + totNAbanWait>N<=M + totNAbanWait>M
```

```
totNConv = totNConvWait<=N + totNConvWait>N<=M + totNConvWait>M
```

Counters for agents

```
totNNew<- + totNPickup<- = totNConv<- + totNAban<- + totNPickup->
```

```
totNNew<- = totNNew<-RC + totNNew<-DCInt + totNNew<-DCExt
```

```
totNConv<- = TotNConv<-RC + totNConv<-DCInt + totNConv<-DCExt
```

```
totNConvAg = totNConvWait<=N + totNConvWait>N<=M + totNConvWait>M
```

Relationship among different times

```
totTConv<- = TotTConv<-RC + totTConv<-DCInt + totTConv<-DCExt
totTService<-RC = TotTConv<-RC + totTHold + totTWrap Up + totTForcedCWC
```

Note:

The Relationship among different times formula is valid only if the agent that you consider is working exclusively with the incoming traffic.

The *totTHold* and *totTWrapUP* variables are used to count incoming and outgoing traffic.

Email reporting features

The system can take a long time to process emails. For example, a week. Hence, you must provide the reporting information during the email processing time.

No difference between interval-based and back office reporting

The interval-based and back office reporting are the same for email reporting. Counters are provided for evaluation at the end of the interval. During this time the system counts an event, such as the arrival of a new email in the system. Only at the end of processing does the system evaluate other counters that record the completion of email processing.

Availability of reporting counters

When you count emails, you must take the calculated period into account.

For report evaluation, you must consider the period, which is the resolution of the time axis and the selected calculated period. You must ensure this condition when you calculate the subtotal, total data, and exported data.

Name	Description
Maximum time to accept	The time to accept starts when an email arrives in the agents folder. If the agent does not open the email, which is an email client in IP Office Contact Center User Interface for Windows or a Web Client, before the maximum time for accepting, the workplace is signed off from the distribution for all agent groups. After the maximum time to accept is exceeded, the system redistributes the email according to the task flow set.
Processing time	The duration between opening and closing an email is the processing time. The time when an agent interrupts the active email or log off is not counted as processing time.
Default for processing time	You can set a default processing time for the agent groups. The default setting is 30 minutes. The system sends a message to the agent if the processing time exceeds the default processing time.

Table continues…

Name	Description
Wait time	The duration between the arrival of an email in the inbox folder of an agent and the time that the agent opens the email is called the wait time.

Service-oriented topic counter

The new reporting counters, such as handling time, service level, and Lost or Successful, are important for the user. Irrespective of the actual history of an email, the selected topic is most important from the point of view of the user.

Handling time or processing time

The processing or handling time is the time between the arrival of an email in the system and the time when the agent completes the email processing.

- Gross handling time: The total time between the arrival of an email and completion of processing the email.
- Net handling time: The time difference between the arrival of the email in the system and the completion of processing the email minus the blocking time of the initial topic during this interval.

Number of emails from the point of view of the user

All mails that are completed by agents are counted as successful for the initial topic, that is totNSucc, regardless of the topic by which the emails reached the agents.

For the initial topic, all emails are counted as definitively unprocessed, that is totNLost, if the emails were deleted by an administrator, even if these emails have already been distributed through several topics.

Email service factor

The net handling time is the calculation basis for the email service factor. The system does not consider the mails that an administrator deletes.

Topic counters for internal workflow

You can verify emails for individual intervals. The counters for the arrival and exit of mails at the beginning and end of the interval are available.

Privileges

You must have the following privileges to use the reporting functions:

- Reporting
- Topic
- Agent group
- Agent
- Show alias only
- Team

- Telephone
- Line
- Outbound ACD
- IVR
- Skill
- System
- PBXs
- Definition
- Automatic reporting
- Delete data
- Parameterize reports

Opening reporting

Procedure

1. On the task bar, click **Supervision**.
2. In the task area, click the **Reporting** ( ) icon.

Evaluating reporting counters

About this task

To evaluate reporting, you must select the relevant reporting counters in the Configuration module.

Procedure

1. On the task bar, click **Administrator**.
2. In the task area, click the **Configuration** icon .
3. In the service menu, click Reporting Filters.
4. From the available reporting counters, click the relevant reporting counters.

Reporting views

Reporting operations can be performed in two ways:

- Creating and editing a report.

- Performing a report evaluation.

Depending on the method of operation, use a different reporting view. To create or edit a report, use the **Inspector** view, and to view a report, use the **File View**.

Reporting File View

The File View is divided into the following:

- The title bar
- The tool bar
- The Folder area
- The Reporting files area

Reporting File View toolbar icons

Icons	Name	Description
	New folder	Creates a new folder.
	New report	Creates a new report.
	Edit	Toggles to the Inspector view. You can edit the selected reporting file in the Inspector view.
	Delete	Deletes the selected reporting file or folder. You can also delete more than one file or folder at a time.
	Full screen	Displays a report in full screen.
	Work area	Displays a report in the work area.
	Export	Exports a report.

Folders and Reporting files

The **Folder** area is displayed in a tree structure. You can use these folders to arrange and clear a layout according to the topic. All users can create private or public folders. You can use private folders, but only users with the required privileges can use public folders. You cannot change the default folders. Folders are displayed in an alphabetical order.

The **Reporting files** area displays the reports of a selected folder. The system displays reports in a table. The type indicates whether a reporting file is a private file or a public file. All users can use private folders, but only users with the required privileges can use public folders. You cannot change the default reporting files. To edit reporting files, you must copy the screens first.

Reporting File View icon descriptions

You can use the following icons to create folders and files in the **Folder** and **Reporting files** area:

Icon	Name	Description
	Folder (public)	Displays a public folder.
	Folder (private)	Displays a private folder.
	Predefined reports [RO]	Displays the default folder.
	File (public)	Displays a public report.
	File (private)	Displays a private report.
	Predefined reporting files [RO]	Displays the default reporting file.

Reporting Inspector view

The **Inspector** view is divided into the following:

- The title bar
- The tool bar
- The Elements area
- The Reporting area

Reporting Inspector toolbar icons

Icon	Name	Description
	Save	Saves the report data.
	Cancel	Cancels the current process and the data is not saved.
	Basic data	Displays the basic report data.
	File view	Toggles to the File View.
	Full screen	Toggles to full screen display.
	Work area	Toggles to the work area.

Reporting area field descriptions

You can use the elements to create a report in the reporting area of the **Inspector** view. You can drag and drop the elements to create a report. You must enter the basic data accordingly. The system displays the following components in the reporting area:

Name	Description
Delete	Deletes the selected element.
Properties	Opens the properties of the selected element.
Select all	Selects all the elements in the reporting area.
Copy	Copies the selected elements.
Add	Pastes the selected elements in the reporting area.

Reporting properties field descriptions

Tab	Name	Description
General	**Name**	Displays the name of the reporting file.
	Size of work area	Displays the size of the work area. You can configure the size of the work area between 1280 and 6,000 points.
Settings	**Grid**	Displays a select operation to display or hide a grid. You can define the size of the grid between 4 and 100 points with the following options: • **Width** • **Height**
Presentation	**Font**	Displays a list of available fonts.
	Line	Displays a list of drawing lines.
	Background	Displays the following options to change the background: • **Color**: Displays the selected color. You can select a color from a palette for the following settings in color selection: - Labeling for text color. - Dividing line for line color.

Table continues…

Tab	Name	Description
		- Background color. • **Image**: Displays the path of the selected image.

Configuring reporting element settings

Changing the position of an element

Procedure

1. Click an element.
2. Use the mouse to drag and drop the element to the reporting area.

   The system displays the element with a red dotted frame and highlighted corners.
3. Place the element in the new position and then release the mouse button.

Changing the size of an element

About this task

You can customize the size of elements by making changes horizontally, vertically, or in both directions depending on the position on the corner. The pointer is displayed as an arrow indicating the possible directions. **Tables** and **Dividing lines** always cover the full width.

Procedure

1. Click an element.
2. Use the mouse to drag and drop the element on to the reporting area.

   The system displays the element with a red dotted frame.
3. Click and drag the corner of the element to enlarge or reduce the size.
4. Release the mouse button.

Folders and reports

You can rename, delete, or change the assignment from private to public or vice versa, and refresh the view of **Folders** and **Reporting files**. You can duplicate a report.

Renaming folders and reports

Procedure

1. Right-click a folder or a report.
2. In the pop-up menu, click **Rename**.
3. Type a name for the folder or report.

Duplicating reports

About this task

You can generate duplicate reports to use by default. For example, you can display the same basic data and the logo for all reports.

Procedure

1. Right-click the report.
2. In the pop-up menu, click **Duplicate**.

   The system generates a new report displaying the original name of the report with a number.
3. Type a new name for the duplicate report.

Deleting folders and reports

About this task

When you delete a folder, the system also deletes all the reports in the folder.

Procedure

1. Right-click a folder or a report.
2. In the pop-up menu, click **Delete** and confirm your selection if prompted.
3. Click **Yes**.

   The system deletes the selected folder or report.

Refreshing views

About this task

You can refresh the view of a report when more than one user is working on the same report. The system displays the changes made by other users in your view.

Procedure

1. Right-click a folder or a report.
2. In the pop-up menu, click **Refresh**.

   The system displays the updated version of the folder or report.

Changing the assignment of reports

Procedure

Do the following:

a. a. Right-click a report.

b. In the pop-up menu, click **Private**.

   The system changes the assignment based on the previous status and the status of report icon changes.

Changing the assignment of folders

About this task

When you change the assignment of a folder, you must specify whether to apply the change of assignment to the reports in the folder.

Procedure

Do the following:

a. Right-click a folder.

b. In the pop-up menu, click **Private**.

   The system displays a message whether to change the other folders and files of the same type.

c. Click **Yes**.

   The system changes the assignment based on the previous status and the status of folder icon changes.

Reporting elements

The following elements are displayed in the **Inspector** view:

Icon	Name	Description
	Basic data	Displays the basic data of the selected report properties as text.
	Logo	Displays the logo of the selected graphic.
	Label	Specifies additional comments for a report with the label.
	Table	Displays a report in table format.
	Pie chart	Displays a report as a pie chart.
	3D pie chart	Displays a report as a pie chart in a three-dimensional (3D) format.
	Line graph	Displays a report as a line graph.
	Bar chart	Displays a report as a bar chart.
	Dividing line	Displays a horizontal dividing line.

Element properties

You can use the elements to compile reports. The following tables displays the two types of elements:

Elements used for labeling	Elements that display report values
• **Basic data** • **Logo** • **Label** • **Dividing line**	• **Table** • **Pie chart** • **3D pie chart** • **Line graph** • **Bar chart**

Basic data element

You can use **Basic data** to represent general report data. You can adjust the size of the basic data field. You can choose whether to display names and data or only data.

The **Basic data** element displays the following information:

- Name
- Date created
- Editor
- Period

Logo element

You can use one or more logos in a report. You can adjust the size of the image and assign a link to the image. Use one of the following image formats:

- JPG
- BMP
- GIF
- PNG

You can select a graphic in the **Image selection** tab.

Label element

With the **Label** element, you can provide additional comments or labeling for reporting. The size of the label field can be adjusted. You can use up to 256 characters.

Table element

You must specify the following properties for a **Table** element:

- Settings
- Period
- Output
- Counters
- Agent

Pie chart element

You must specify the following properties for a **Pie chart** element:

- Settings
- Period
- Counters
- Agent

3D pie chart element

You must specify the following properties for a **3D pie chart** element:

- Settings
- Period
- Counters
- Agent

Line graph element

You must specify the following properties for a **Line graph** element:

- Settings
- Period
- Output
- Counters
- Agent

Bar chart element

You must specify the following properties for a **Bar chart** element:

- Settings
- Period
- Output
- Counters
- Agent

Dividing line element

You can specify the properties of a horizontal line. The Dividing line always covers the entire length of reporting area. You can only move the line up or down. The following table lists the presentation options:

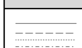
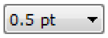
Icon	Name	Description
	**Line**	Displays the selected line type.

Table continues…

Icon	Name	Description
	**Line width**	Specifies the value for the line width.
	**Text color**	Displays a color palette. You can select a line color from the color palette

Pie charts and 3D pie charts

You can create a **Pie chart** or **3D pie chart** for an agent or topic. Depending on the type of reporting you choose, the information varies.

Name	Description
Pie chart or 3D pie chart for an agent	
Call balance	Indicates how many calls the agent received and what happened to the calls. The Call balance counters are: • totNAban<- • totNConv<- • totNPickup->
Pie chart or 3D pie chart for a topic	
Success balance	Indicates the number of calls received for the topic and the number that resulted in a connection. The success balance counters are: • totNLost • totNSucc
Topic balance	Indicates the number of calls received for the topic and what happened to the calls. The topic balance consists of the following counters: • totNRouted-> • totNConvExtDest • totNConvAutoAg • totNAban • totNConvAg
Conversation balance	Indicates the number of calls that led to a conversation and the wait time for the calls. The conversation balance consists of the following counters: • totNConvWait>M • totNConvWait>n<=M • totNConvWait<=N

Tabs

Settings tab field descriptions

Name	Description
Reporting name	Displays the name of the report. You cannot change the settings of the report.
Do you want the reporting to be accessible by you exclusively or by all users in the system?	Displays the type of reports. You cannot change the settings of the report. The options are: • **Private** • **Public**
Select the type of a reporting	Displays the type of reporting, depending on the element. The options are: • Agent • Agent group • Dialer • IVR • PBXs • Skill combination • System • Team • Telephone • Topic • Trunk line
Priority	Displays the priority of the report. You can set the priority between 1 and 9. The priority is appropriate for automatic reporting.
Use only basic data/time range	Indicates that there are no period definitions for the elements in the report. The system uses the basic data period only for all elements. The *Using Avaya Agent for Chrome on IP Office Contact Center* displays reports only when you select this option.

Period field descriptions

When selecting the new entries, you must ensure the following:

- The time intervals in the table must ascend.

- A new entry takes place behind the marked line.
- A time gap must be present, to add a new entry.
- The time intervals must not overlap.

Name	Description
Use settings from basic data	Displays the default time settings from the basic data. If you change the time settings of the basic data, the time settings for the corresponding statistics also changes.
Start **End**	Displays a calender. You can set a day for the start and end of the time frame. You can change the month with the arrow keys. You can enter a start time and an end time to generate hourly statistics automatically.
Restrict to	You can limit the time frame to specific days of the week, and you can also limit the time of day for report data sampling. • **Days**: Displays the seven days of a week. You can select a day to generate a report. The system displays the selected day as dimmed. If you select a day marked with a red diagonal line, then you cannot generate a report on that specific day. • **Time periods**: Displays the configured times. The table displays a beginning and end time with duration. You can edit the time. You can enter maximum one day starting from 12.00 a.m. to 11:59 p.m. The entry of the time periods is preset and cannot be deleted.

Use the following buttons to configure the Time periods:

Button	Description
+ New Entry	Inserts a new entry if the available rows are insufficient.
✕ Delete	Deletes the selected entry.

Output tab field descriptions

Name	Description
Use settings from basic data	Displays a check box to use the default basic data settings.
Resolution of time axis	Displays settings for the time-axis resolution The options are: • **Months** • **Weeks** • **Days** • **Total period** • **User defined** • **Hours**

Table continues…

Name	Description
	• **minutes**
Table view	
Broken down into: Agent	Displays all reporting counters for Agent. The table is broken down into agents.
Broken down into: Time	Displays the counters chronologically. The table is broken down into dates.
Technical total	Displays the results of a counter. The conversations or established call counters exceeding the calculation period are not filtered.
Logical total	Displays values for mathematical calculation. If a conversation continued for two calculation periods, this conversation counts for both calculation periods. In contrast to the technical total, the logical total refers to the survey period.
Export	
Export file	Displays the name of the file entered. If an export file is not specified, then the name of the macro file with an added number is used when a macro is used.
Name of export file with date and time	Displays a check box to select a file with date and time. You can use the following format to export a file: Name_YYYY-MM-DD_hh-mm.Extension
Export folder	Displays the file path of the folder to export or the default folder. The selected folder is valid for all export files until you change the file path of the folder to export again. The default folder is set during the installation.
Excel macro	
Macro file **Macro name**	Displays the macro file and macro name that you entered. You can use a macro to export a file in MS Excel .
Output medium	
• **Excel** • **CSV** • **PDF** • **RTF**	Displays the output options for automatic reporting. You can select one or more formats for the output medium.
Scheduler	Displays the host name of your computer. The system enters the host name automatically.
This PC	Displays the host name of your computer. You must click the button to enter the host name of your computer.
Additionally send as an Email.	
To:	Displays the recipient email address.
Subject:	Displays the subject of the email. If you do not enter a subject, then the system uses the statistic name.
SMPT server:	Displays the name of the server.

Counters tab field descriptions

Name	Description
Available elements	Displays a list of available counters. The list displays the reporting counters in following three tabs: • **Telephony** • **Email** • **Chat**
Current elements	Displays a list of selected available counters. The current elements display the following two tabs: • **Counters**: Displays the selected available counters. • **Task**: Displays the task type
Add	Adds an element from the list of available counters to the current counters.
Delete	Deletes the element from the list of current counters.
Up	Moves the selected counter in an upward direction.
Down	Moves the selected counter in a downward direction.
View	Displays the names or abbreviations of the reporting counters. • A pound sign (#): Displays that the counter is broken down into topics. • An asterisk (*): Displays that the counter is broken down into agent groups. You cannot use reporting counters for each topic (#) or each agent group (*) in graphical presentation.
Description	Displays an exact description of the reporting counter and the counting method used. Each counter consists of an abbreviation, a name, and an explanation.

Reporting type tab field descriptions

The reporting type tab displays the name of the report depending on the reporting type that you choose. For example, if you select Agent as the reporting type, the name of the tab displays as Agent.

Name	Description
Available elements	Displays a list of available elements.
Current elements	Displays a list of selected available elements.
Add	Adds an element from the list of available elements to the list of current elements. If you select **Agent** as the reporting type, you can add either agents or agent groups.
Remove	Removes an element from the list of current elements. If you select **Agent** as the reporting type, you can remove either agents or agent groups.

Generating and viewing reports

Creating new reports

Procedure

1. Do one of the following:
   - In the **Reporting-File view** menu bar , click **New report**.
   - In the **Reporting files** area, right-click a report and click **New** > **File (public)**.

   The system creates and displays a new report.
2. Type a name for the new report.

Generating reports

About this task

Reports recorded in the past are generated automatically. The number of display is restricted to ensure that the output is manageable. The system displays a warning message if the number of displays exceeds the number of display. To manage the output, reduce the reporting parameters, that is, period, reporting counters, and objects. Use this procedure to generate a report that has not yet finished recording or not yet begun to record.

Before you begin

- Ensure that the statistics generator must work.
- Log in as a service.

Procedure

1. In the **Reporting files**, right-click a report.
2. Click **Generate**.

   The system displays a green icon in the list of files indicating that a report is generated. You cannot use other functions.
3. To generate a report in the work area, do the following:
   a. In the menu bar, click **Work area**.
   b. In the **Reporting display** dialog box, click **Generate**.

      The system generates a report.

Viewing reports in full screen

About this task

If the reporting is extensive, you can view the report in full screen.

Procedure

1. In **Reporting Files**, click a report.
2. Click **Full screen**.

   The system displays the report in full screen.
3. To return to the normal view, click **Full screen** again.

Editing reports

Procedure

1. In the **Reporting files** area, click a report.
2. Do one of the following:
   - On the menu bar, click **Edit**.
   - Right-click a report, and click **Edit**.
3. In the Basic data dialog box of the Inspector view, configure the basic data.

Automatic reporting

Automatic reporting is calculated at the time specified by you, with the specified cycle and type of output. The evaluation of the report takes more time than expected because many parameters are taken into account, for example large number of counters or extensive period. The automatic evaluation of the report is defined as automatic reporting that is calculated even when you are not logged in.

You can define the following settings for automatic reporting:

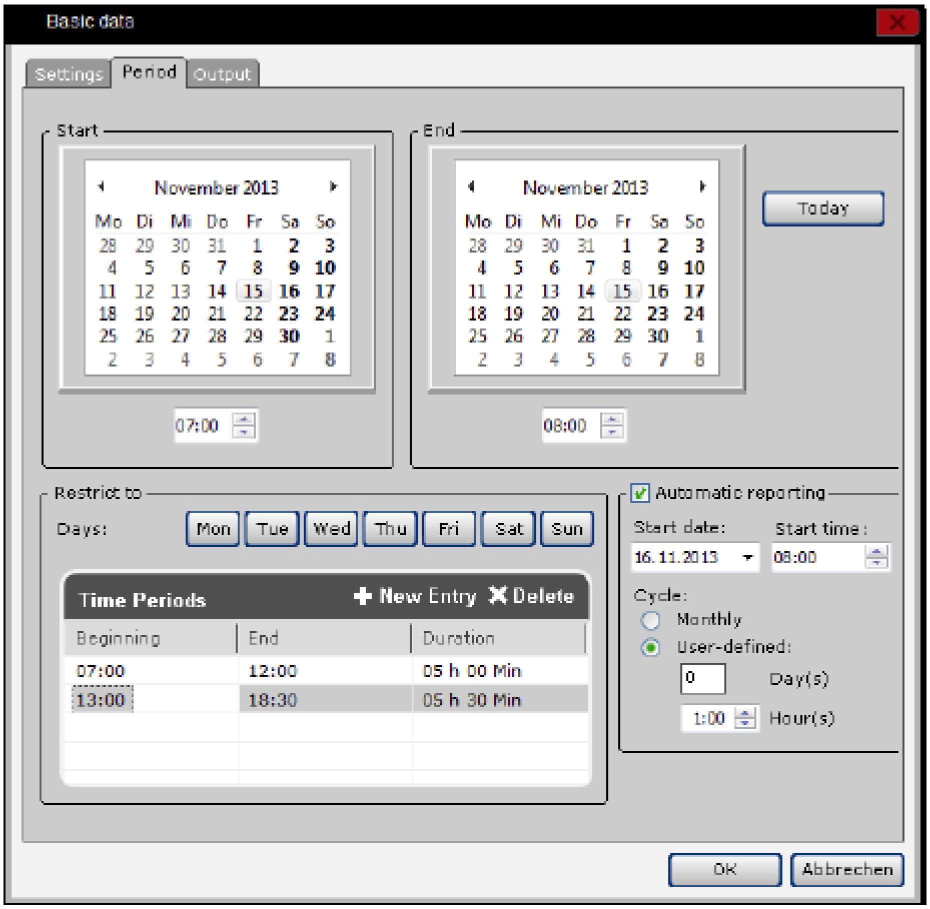
Name	Description
Start date	Displays the start date.
Start time	Displays the start time.
Cycle	Displays a monthly cycle and a user-defined cycle. You can set the days or hours for the user-defined cycle.

The Statistics Scheduler works in an hourly cycle. However, statistics are generated in an unlimited area.

With The **Days** and **Hours** fields you can configure the period for statistics. The default preset values for manual statistics is 00:00 a.m. and 11:59 p.m., which cannot be changed. If the statistics to generate exceeds the default preset value, you must change the preset values. For example, if you want to generate a statistic from 8:00 p.m. to 4:00 a.m., then you must change both values in the input fields.

Example for Automatic Statistics

The following example displays an application for automatic statistics. Every hour statistics are generated that display the values of the last hour. Use the **Period** tab in **Basic data** to configure the times specifying when and in which cycle automatic statistics can be generated. The following illustration displays an example of the settings:



Settings	Time
Start time	7.00 a.m.
End time	8.00 a.m.
Cycle	1.00 hour
Limitations	7.00 a.m. to 12.00 p.m. 1.00 p.m. to 6.30 p.m.

The system generates the following statistics:

Statistics	Time generated	Statistics period
1	8.00 a.m.	7.00 a.m. to 8.00 a.m.
2	9.00 a.m.	8.00 a.m. to 9.00 a.m.
3	10.00 a.m.	9.00 a.m. to 10.00 a.m.
4	11.00 a.m.	10.00 a.m. to 11.00 a.m.
5	12.00 p.m.	11.00 a.m. to 12.00 p.m.
6	2.00 p.m.	1.00 p.m. to 2.00 p.m.
7	3.00 p.m.	2.00 p.m. to 3.00 p.m.
8	4.00 p.m.	3.00 p.m. to 4.00 p.m.
9	5.00 p.m.	10.00 a.m. to 5.00 p.m.
10	6.00 p.m.	10.00 a.m. to 6.00 p.m.
11	7.00 p.m.	6.00 p.m. to 6.30 p.m.

Generating automatic reports

Before you begin

Start the Reporting Scheduler on your computer or another computer in the network.

Procedure

1. Create a report with the appropriate settings and the elements.
2. In **Basic data**, click the **Period** tab.
3. Select **Automatic reporting**.
4. Enter a date and time.
5. Click the **Output** tab.
6. In the **Export file** field, enter a file name.
7. In **Output medium**, select an output.
8. In the **Scheduler** field, enter the name of the computer on which the Reporting Scheduler process is running.
9. To save settings, click **OK**.

   The system generates a report automatically at the specified time. Automatic reporting is located in `C:\Documents and Settings\All Users\Application Data \reporting data`.

Exporting reports

Before you begin

Create and generate a report.

Procedure

1. In the **Reporting files** area, click a report.
2. Do one of the following:
    - On the menu bar, click **Export**.
    - Right-click a report, click **Export**.
3. In the Export Reports dialog box, in the **Export file** field, enter a file name.
4. In **Output medium**, select one or more output media.
5. In **Macro file**, enter a file name, and in the **Macro name** field, enter a name.
6. Click **OK**.

    The system exports the report in the selected formats and displays the Export successful dialog box.
7. Click **OK**.

    The system displays the files in the folder `C:\Documents and Settings\ All Users \Application Data\reporting data`.

    To open these files, you need the appropriate programs in the IP Office Contact Center system.

Basic data configuration

You can use **Basic data** to create more than one table in a report with identical values. You need not configure the values in each table individually because the system populates the **Table** elements with the basic data.

Configuring the Settings tab

About this task

You cannot change the name of a report in the basic data.

Procedure

1. In the **Inspector** view, click **Basic data**

2. In the Basic data dialog box, in **Do you want the reporting to be accessible by you exclusively or by all users in the system?**, select **Private** or **Public**.
3. In the **Select the type of reporting** pop-up menu, click a reporting type.
4. In the **Priority** pop-up menu, choose between 1 and 9.
5. Select the **Use only basic data/time range**.

Configuring the Period tab

Procedure

1. In the **Inspector** view, click **Basic data**.
2. In the Basic data dialog box, click the **Period** tab.
3. Click a date in the following fields:
    a. **Start**
    b. **End**

    The system displays the selected dates as dimmed ellipses. Use the arrow keys to can change the month.
4. To limit generating reports on a specific day, in the **Days** field, click an appropriate day.

    The system displays the selected day as dimmed and with a red diagonal line.
5. To configure **Time periods**, do the following:
    a. To start recording, double-click an available field in **Beginning** and enter the time.
    b. To stop recording, double-click an available field in **Stop** and enter the time.

    The period cannot exceed 24 hours. You can make more than one entry to set time limits. The system automatically enters the end time from the previous row. Use the arrow keys to can change the time.
6. **(Optional)** To insert new rows, click the + New Entry icon.
7. **(Optional)** To delete a row, click the ✕ Delete icon.

Configuring the Output tab

About this task

In a graphical presentation, the horizontal axis represents the time axis and the vertical axis represents the evaluated data. You can control the time axis with the settings in **Resolution of time axis**. The system automatically controls the presentation on the vertical axis. Depending on the resolution, the system labels the scale of the horizontal axis or divides the axis. You cannot label the axis if the resolution of the horizontal axis is set to 24 hours. If your report includes a long survey period, your results might be of little significance.

Procedure

1. In the **Inspector** view, click **Basic data**.
2. In the Basic data dialog box, click the **Output** tab.
3. On **Resolution of the time axis**, choose a time frame.

   You can choose between total period or the months, weeks, days, and the total user-defined time broken down into hours and minutes. If you select the hours and minutes, the calculation might take longer.
4. For a table display, in **Table view**, select one of the following:
   - **Agent**: If you select **Agent**, select **Technical total**, **Logical subtotal** and **Logical total**.
   - **Time**: If you select **Time**, select **Technical total** and **Logical total**.
5. To save the settings, click **OK**.

   The system configures the **Output** tab.

Inserting and editing labeling elements

Inserting and editing basic data

Procedure

1. Click the **Basic data** element (▤) icon.
2. Press the mouse button, and drag the **Basic data** element to the reporting area.
3. To edit the properties, right-click **Basic data** and click **Properties**.
4. In the Properties dialog box, configure the properties.
5. Click **OK**.

Inserting and editing a logo

Procedure

1. Click the **Logo** element () icon.
2. Press the mouse button, and drag the **Logo** element to the reporting area.
3. In **Image selection**, click **Select**.
4. Navigate to the image and click **Open**.

   The system displays the file path of the selected graphic .

5. **(Optional)** You can create a link to the logo on the **General** tab. You can then toggle to the specified real time information or to another file in the reporting area.
6. Click **OK**.
7. To edit the properties, right-click **Logo** and click **Properties**.
8. In the Properties dialog box, configure the properties.
9. Click **OK**.

Inserting and editing a label

Procedure

1. Click the **Label** element ( ) icon.
2. Press the mouse button, and drag the **Label** element to the reporting area.
3. To edit the properties, right-click **Label** click **Properties**.
4. In the Properties dialog box, in the **Presentation** tab, do the following:
    a. Select **Font** to change the font settings.
    b. Select **Background** to change the background color.
5. Click **OK**.

Inserting and editing a dividing line

Procedure

1. Click **Dividing line** element ( ) icon.
2. Press the mouse button, and drag the **Dividing line** element to the reporting area.
3. To edit the properties, right-click **Dividing line** and click **Properties**.
4. In the Properties dialog box, in the **Presentation** tab, do the following:
    a. Select **Font** to change the font settings.
    b. Select **Background** to change the background color.
5. Click **OK**.

Inserting and editing Table

Procedure

1. Click the **Table** element icon .

2. Use the mouse to drag and drop the **Table** element to the reporting area.
3. To edit the properties, right-click **Table** and click **Properties**.
4. In the Properties dialog box, configure the properties.
5. Click **OK**.

Inserting and editing Pie chart or 3D pie chart

Procedure

1. Click the **Pie chart** element icon or the **3D pie chart** element icon .
2. Use the mouse to drag and drop the **Pie chart** or **3D pie chart** element to the reporting area.
3. To edit the properties, right-click the **Pie chart** or **3D pie chart** and click **Properties**.
4. In the Properties dialog box, configure the properties.
5. Click **OK**.

Inserting and editing Line graph

Procedure

1. Click **Line graph** element) icon.
2. Use the mouse to drag and drop the **Line graph** element to the reporting area.
3. To edit the properties, right-click **Line graph** and click **Properties**.
4. In the Properties dialog box, configure the properties.
5. Click **OK**.

Inserting and editing Bar chart

Procedure

1. Click the **Bar chart** element icon .
2. Use the mouse to drag and drop the **Bar chart** element to the reporting area.
3. To edit the properties, right-click **Bar chart** and click **Properties**.
4. In the Properties dialog box, configure the properties.
5. Click **OK**.

Deleting an element

Procedure

1. Right-click an element in the reporting area.
2. Click **Delete**.
3. Click **Yes**.

   The system deletes the selected element.

Chapter 9: Agent Status Reports module overview

Agent Status Reports is a statistical evaluation of agent activities that are not related to calls or emails. You can use Agent Status Reports to track when and how often the agents sign on, sign off, and take breaks. In counter-based reports, you can only evaluate the presence and break times.

You can use Agent Status Reports to display a table of presence and break times for one or all agents. This feature is called agent reporting in the IP Office Contact Center system.

Related links

Opening the Agent Status Reports module on page 211
Creating agent status reports on page 211
Paging through Agent Status Reports on page 214

Opening the Agent Status Reports module

Procedure

Do one of the following:

- On the task bar, click **Supervision** and select the **Agent Status Reports** icon ( ).
- On the **Go to** menu, select **Agent Status Reports**.

The system displays the user interface of the Agent Status Reports module.

Related links

Agent Status Reports module overview on page 211

Creating agent status reports

About this task

To generate an agent status report, you must set the start date, end date, agent, and activities in the Agent Status Reports module.

Procedure

1. Click the calendar icon and click a date to change the dates in the following fields:
    a. **Start**
    b. **Stop**
2. In the **Agents** field, click an agent.
3. In the **Activities** field, click an activity.
4. Click **Search**.

   The system gets the data from the database and displays a table with the Agent Status Reports. Depending on the amount of data, the system might take a few minutes to generate the report.

Related links

Agent Status Reports module overview on page 211
Agent Status Reports field descriptions on page 212
Records field descriptions on page 213

Agent Status Reports field descriptions

Name	Description
Start	Displays the start time for the Agent Status Report.
Stop	Displays the stop time for the Agent Status Report.
Agent	Displays the agent or agents to include in the agent status report. You can select one agent or all agents.
Activity	Displays the actions to select for the Agent Status Report. The options are: • **all** • **Login/logout** • **Sign on/sign off** • **Break Time** • **Wrap up time without call**

Related links

Creating agent status reports on page 211

Records field descriptions

Name	Description
Agent name	Displays the name of the agent.
Time stamp	Displays the time stamp with the date and time. The system records each agent activity with a time stamp.
Login/logout	Specifies whether the agent is logged in or logged out of the system regardless of the task type. The options are: • **Login** • **Logout**
Sign on/sign off	Specifies whether an agent is signed in or signed off of the system. The options are: • **Sign on** • **Sign off**
Break Time	Specifies whether the agent is on a break. If the agent takes a break and signs off from the system, the system displays the status as **Pause on**. If the agent signs on to the system after the break, the system displays the status as **Pause off**.
Wrap Up without call	Specifies the status of the wrap-up time. If an agent for the Telephony enters the wrap-up time without an active call, the system displays the status as **Wrap Up**. When the wrap-up time ends, the system displays the status as **off**. The wrap-up time can be ended manually or by the system after 2 hours.
Additional info	Displays additional information when an activity starts. If the agent is logged off automatically, the **Additional info** field displays the following information for the activities: • **Login/logout**: Displays the device number that the agent uses to log in to the system. This field does not display any information for other activities. • **Sign on/off**: Displays the name of the agent group to which the agent has signed on or from which the agent has signed out. This field does not display any information for other activities. • **Break Time**: Displays the break code. This field does not display any information for other activities. For example, if the agent logs off from the system automatically, the **Additional info** field displays the login number, and agent group. For **Wrap Up without call**, the **Additional info** field does not display any information.
Task type	Displays the task type. The options are: • **Voice**: Telephony tasks. • **Email**: Email tasks.

Related links

Creating agent status reports on page 211

Paging through Agent Status Reports

About this task

If the search results of an agent status report consist of more than 15 lines of information, you can page through the information. The system displays the number of pages with the search results.

Procedure

1. To page through the search results, click one of the following:
   - The next icon >>: To go to the next page.
   - The previous icon <<: To go to the previous page.
   - The last icon >|: To go the last page.
   - The first icon |<: To go the first page.
2. To go to a particular page, enter the page number and click **Go to**.

   The system displays the report in the selected page.

Related links

Agent Status Reports module overview on page 211

Chapter 10: Contact Detail Reports module overview

Contact Detail Reports module is a statistical evaluation that provides information about all task types including calls and emails. This module provides information about callers, dialed topics, conversation lengths, and agents involved in each task type, such as Telephony and Email. Counter-based reports provide only summary values such as number of calls, number of conversations, total conversation times, and average conversation times.

You can use the Contact Detail Reports module to create an advanced report of your customer contacts:

Name	Description
Invoicing for customers (inbound)	Specifies that invoicing is based on services rendered and documents.
Reporting user processes	• Displays how customers communicate with the IP Office Contact Center system. • Displays the topics and agents that are involved. • Displays how long the customers communicate and with whom.
Detailed task type processes	Displays the processes broken down by the task type for each IP Office Contact Center agent.

Related links

Opening the Contact Detail Reports module on page 215
Creating Contact Detail Reports on page 216
Viewing the report details on page 219
Paging through Contact Detail Reports on page 222
Exporting Contact Detail Reports on page 223

Opening the Contact Detail Reports module

Procedure

Do one of the following:

- On the task bar, click **Supervision** and select the **Contact Detail Reports** icon .

- On the **Go to** menu, select **Contact Detail Reports**.

The system displays the user interface of the Contact Detail Reports module.

Related links

Contact Detail Reports module overview on page 215

Creating Contact Detail Reports

Procedure

1. Click the calendar icon and click a date to change the dates in the following fields:
    a. **Start**
    b. **Stop**
2. In the **Topic** field, click a topic.
3. In the **Task type** field, select one of the following:
    - **All**
    - **Telephone**
    - **Email**
    - **Chat**
4. **(Optional)** In the **Caller/Sender** field, enter one of the following details:
    - Caller
    - Sender
5. **(Optional)** In the **Selected address** field, enter one of the following details:
    - Dialed number
    - Destination address
6. Click **Search**.

    The system gets the data from the database and displays a table with the Agent Status Reports. Depending on the amount of data, the system might take a few minutes to generate the report.

Related links

Contact Detail Reports module overview on page 215
Contact Detail Reports field descriptions on page 217
Records field descriptions on page 217

Contact Detail Reports field descriptions

Name	Description
Start	Displays the start time for the Contact Detail Reports.
Stop	Displays the stop time for the Contact Detail Reports.
Topic	Displays the topic to include in the Contact Detail Reports. You can select one topic or all topics.
Task Type	Displays the task type for the Contact Detail Reports. The options are: • **All**: All task types. • **Telephone**: Only telephone task types. • **Email**: Only email task types. • **Chat**: Only chat task types.
Caller/Sender	Displays the telephone number for the Contact Detail Reports. You can use an asterisk * as a placeholder. The system generates a list of callers and senders from the database.
Selected address	Displays the numbers or destination email addresses to include in the contact detail reports.

Related links

Creating Contact Detail Reports on page 216

Records field descriptions

Name	Description
Details	Specifies that the connection level details are available for the contact.
Time stamp	Displays the start time of the contact.
Task type	Displays the task type.
Caller/Sender	Displays the number or email address of the caller.
Selected address	Displays the first number that the contact called.
Original topic	Displays the name of the first topic during the call.
Connection status	Displays the initial contact connection status with the following details: • **ConnectedDirect**: Connected without a queue. • **ConnectedQueued**: Connected with a queue without an announcement. • **ConnectedQueuedAnnounce**: Connected with a queue and an announcement. • **DroppedOverload**: Disconnected by the system due to overload. • **DroppedBusy**: Disconnected by the system because the system is busy.

Table continues…

Name	Description
	• **DroppedCanceled**: Disconnected by the system by the call flow. • **AbandonedAlerting**: Disconnected by the caller during a call. • **AbandonedQueued**: Disconnected by a caller in queue without an announcement. • **AbandonedQueuedAnnouncement**: Disconnected by a caller in queue with an announcement.
Number of customer records	Displays the number of customer records.
Number of customer connections	Displays the number of customer connections.
Chargeable time	Displays the total chargeable caller connection time by the agent for the contact.
Customer ring time	Displays the total caller call time by the agent for the contact.
Customer conversation time	Displays the total caller conversation time by the agent for the contact.
Customer time on hold	Displays the total caller hold time by the agent for the contact.
Customer wait time	Displays the total caller wait time by the agent for the contact.
Number of consultations	Displays the number of attempted consultations by the agent for the contact.
Number of consultation calls	Displays the number of consultations with a connection for the contact.
Consultation speech time	Displays the total conversation time in consultation for the contact.
Total Wrap Up	Displays the total wrap-up time for the entire contact.
Direct topic dial in	Specifies whether the subscriber selects the topic. The options are: • **Yes** • **No**
External contact	Specifies whether the contact is an external contact. The options are: • **Yes** • **No**
Inbound contact	Specifies whether the contact is an inbound contact. The options are: • **Yes** • **No**
OutCC contact	Specifies whether the contact is an outgoing call center call. The options are: • **Yes** • **No**

Table continues…

Name	Description
Dialer contact	Specifies whether the contact is established using the dialer. The options are: • **Yes** • **No**
Voice mail is recorded	Specifies whether the contact begins with recording a voice mail message. The options are: • **Yes** • **No**
Network overflow	Displays the total number of network overflows for the contact.

Related links

Creating Contact Detail Reports on page 216

Viewing the report details

About this task

You can view additional details for each contact list in the Contact Detail Report table.

Before you begin

Generate a contact detail report.

Procedure

In the Contact Detail Report table, click the **Details** icon.

The system displays the details for a contact in the table.

Related links

Contact Detail Reports module overview on page 215
Connections details field descriptions on page 219

Connections details field descriptions

Name	Description
Details	Specifies whether additional information is available. This field is blank if additional topic or destination information is unavailable.
Time stamp	Specifies the time at which the connection started.
Caller/Sender	Specifies the number or email address of the caller. This field is blank if information is unavailable.

Table continues…

Name	Description
Caller/Sender Name	Specifies the caller name from the IP Office Contact Center customer recognition. This field is blank if information is unavailable.
Customer number	Specifies the customer number from the IP Office Contact Center customer recognition. This field is blank if information is unavailable.
Customer priority	Specifies the customer priority from the IP Office Contact Center customer recognition. This field is blank if information is unavailable.
Selected address	Specifies the number called for this connection even if the call was routed.
First topic	Specifies the routing topic. If the system makes a consultation with a call center topic, the transferred call also contains the name of the routing topic.
Last topic	Specifies the last topic used. For example, for topic overflow.
Task type	Specifies the task type. The options are: • Telephone • Email
Connection status	Specifies the initial contact connection status with the following details: • **ConnectedDirect**: Connected without a queue. • **ConnectedQueued**: Connected with a queue without an announcement. • **ConnectedQueuedAnnounce**: Connected with a queue and an announcement. • **DroppedOverload**: Disconnected by the system due to overload. • **DroppedBusy**: Disconnected by the system because the system is busy. • **DroppedCanceled**: Disconnected by the system by the call flow. • **AbandonedAlerting**: Disconnected by the caller during a call. • **AbandonedQueued**: Disconnected by a caller in queue without an announcement. • **AbandonedQueuedAnnouncement**: Disconnected by a caller in queue with an announcement.
Call time	Specifies the total call times for all B-subscribers or the time that an email remains unread.
Speech or active time	Specifies the total conversation times of all B-subscribers for conferences greater than the chargeable connection time or the email processing time.
Wait time	Specifies the total wait time for all B-subscribers. The wait time is the time between the start of the connection and contact with the agent. The total includes all times in the queue and call times with the agent. The total equals the total of all wait times for the associated agent records.
Time on hold	Specifies the total hold time for all B-subscribers.

Table continues…

Name	Description
Chargeable time of connection	Specifies the chargeable connection time, ISDN.
Wrap Up	Specifies the total Wrap-Up times for all B-subscribers.
Consultation	Specifies whether the contact was a consultation. The options are: • **Yes** • **No**
Routed	Specifies whether the contact was an ACD call. The options are: • **Yes** • **No**
Voice mail is recorded	Specifies whether a voice mail message was recorded. The options are: • **Yes** • **No**
Dialer contact	Specifies whether the call was from the outbound dialer. The options are: • **Yes** • **No**
Network overflow	Displays the number of network overflows in this connection.

Topic Information

Name	Description
Time stamp	Displays the time when the call was placed to the routing topic.
Topic	Displays the routing topic. In case of a topic overflow, the topic can vary from the dialed topic.
Destination name	Displays the agent name or name of the external destination when the call is routed to an agent. This field is blank if information is unavailable.
Wait time	Displays the wait time in the topic queue.
Announcement	Displays the wait time in the topic queue with DSPF, VEA, VU, and MHX announcements.
Announcement script	Displays the wait time in the topic queue with a VEA or DSPF announcement.
VU script	Displays the wait time in the topic queue with a VU announcement.
Welcome announcement	Displays the wait time in the topic queue with a welcome announcement such as VEA, DSPF, or VU.

Destination Information

Name	Description
Time stamp	Displays the time when the call was routed to the agent.

Table continues…

Name	Description
Destination name	Displays the destination name. The options are: • **Agent** • **External destination**
Destination	Displays the destination number. The options are: • **Agent** • **External destination**
Destination type	Displays the destination type. The options are: • **Agent** • **External destination**
Agent group	Displays the agent group used to route the call to the agent.
Topic	Displays the name of the routing topic used to route the call to the agent.
Wait time	Displays the total wait time of the caller until the call was connected to the agent. The total includes all time in the queue and the call time. The agent-specific wait time restarts from zero following a conversation with an agent.
Ring time	Displays the call time on the agent telephone for an active connection.
Speech-/active time	Displays the conversation time of the agent in the active connection.
Time on hold	Displays the hold time of the agent in the active connection.
Wrap Up	Displays the wrap-up time of the agent in the active connections.
Job code	Displays the job code. If the call has more than one job code, the system saves only the last value.

Related links

Viewing the report details on page 219

Paging through Contact Detail Reports

About this task

If the search results of a Contact Detail Report consists of more than 15 lines of information, you can page through the information. The system displays the number of pages with the search results.

Procedure

1. To page through the search results, click one of the following:
   - The next icon >>: To go to the next page.
   - The previous icon <<: To go to the previous page.
   - The last icon >I: To go the last page.

- The first icon |<: To go the first page.

2. To go to a particular page, enter the page number and click **Go to**.

   The system displays the report in the selected page.

Related links

Contact Detail Reports module overview on page 215

Exporting Contact Detail Reports

Before you begin

Generate a Microsoft® Excel file or a `.csv` file for the active Contact Detail Report data.

Procedure

Click one of the following:

- **Create Excel**.
- **Create CSV**.

The system generates a file with details such as the date and hour at which the report is created, and copies this information to the following location:

`C:\Documents and settings\All Users\Documents\reporting data.`

Example

The following are examples of export files:

- `CR-20090114-1005.xls`
- `CR-Details-20090115-0954.xls`

Related links

Contact Detail Reports module overview on page 215

Part 3: Administration

Chapter 11: Interface configuration module

User Interface Configuration overview

You can use the User Interface Configuration module to configure the contact bar for a profile or an agent. You can also assign the configured Home and Telephony real time view to a profile or an agent.

Opening the User Interface Configuration module

Procedure

Do one of the following:

- On the **Go to** menu, click **UI Config**.
- In the left pane, click **Administration**, and then click the **UI Config** icon..

The system displays the user interface of the User Interface Configuration module.

UI configuration user interface overview

The **UI Config** user interface has a left pane and a right pane. The folders in the left pane are:

Name	Description
System	Displays the configured systems.
Profile	Displays a list of configured profiles.
Agent	Displays a list of configured agents.

Opening the agent interface configuration

Procedure

1. On the **UI Configuration** tab, click **Agent**.

2. From the list of configured agents in the right pane, double-click an agent name.

   The system displays the **UI configuration for agent** dialog box.

   You can change the configurations for the agent in the UI configuration for agent dialog box.

Updating the view

About this task

The system loads data only when you log in to the User Interface Configuration module. However, if you make changes to a profile, the system does not display the changes. To see the changes, you must refresh the page.

Procedure

1. On the **UI Configuration** tab, select **Profile**.
2. From the list of configured profiles, right-click a profile.
3. In the pop-up menu, click **Refresh**.

   The system displays the profile with the recent changes.

UI configuration settings

You can set the following interfaces for a system, profile, or an agent:

- **Contact bar**
- **Home**
- **Telephony**
- **Application**
- **Realtime information**
- **Web UI agent**
- **Web UI**

You can set the **Autostart RT Information** interface only for a profile or an agent. When **Autostart RT Information** interface configuration is unavailable for an agent, the system loads the real time information interface of the profile. If the agent stores the window position of the monitor, the system uses the window position of the agent or the profile.

You can configure an image in **Configuration** > **General** agent configuration tab. The image displays an image for the agent. You can select an image in the `.jpg`, `.bmp`, `.gif` or `.png` format. Note that large image files delays the display. You can configure the image to view the agent picture in Avaya Agent for Chrome – IP Office Contact Center User Interface application.

UI configuration privileges

If you have the UI Configuration privilege, you can specify the settings in the **UI Configuration** tab. However, to configure the interfaces on the **UI Configuration** tab, you must get the required privilege for each interface. You can specify the settings in the **UI Configuration** tab if you get the required privilege for each interface.

The interfaces and the privileges required for the interfaces are:

Tab	Privilege	Description
Contact bar	Contact bar configuration	You can configure the telephony elements on the **Contact bar** tab. For example, you can configure the telephone elements for an agent.
Home	Home configuration	You can configure the home real time view on the **Home** tab. For example, you can configure the home real time view for an agent.
Telephony	Telephony configuration	You can configure the telephony elements on the **Telephony** tab.
Autostart RT Information	UI configuration	You can select the RT Information to autostart real time monitoring after logging in to the system. For example, for a supervisor you can set the RT Information to autostart real time monitoring after logging in to the system.
Application	UI config Application	You can select an active view when you start an application.
Realtime view	Configuration grid colors	You can define the colors for the grid elements on the **Realtime information** tab.
	Task bar flashing	You can turn on or turn off the flashing of the task bar on the real time view alarms. The system display displays a change only when an agent logs in to the system again.
Web UI agent	UI config Customer data	You can configure the customer data up to 6 call details. You can view the details of the customer in an incoming call in Avaya Agent for Chrome – IP Office Contact Center User Interface application.
	UI config Web access	You can configure websites to access web-based information in Avaya Agent for Chrome – IP Office Contact Center User Interface application.
Web UI	UI config Threshold	You can configure the threshold setting to affect the colors used to display various elements in Avaya Agent for Chrome – IP Office Contact Center User Interface application.
	UI config Variables	You can configure variables that the Supervisors can control in Avaya Agent for Chrome – IP Office Contact Center User Interface application.

Configuring the contact bar

About this task

You can configure the contact bar for a system, profile, or agent.

Procedure

1. On the **UI Configuration** tab, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. From the list of configured systems, agents, or profiles in the right pane, double-click an item in the list.
3. In the UI Configuration dialog box, in the **Contact bar** > **Available elements** field, select the required elements and click **Add**.

   The system adds the selected elements to the **Selected elements** field.
4. Click **OK**.

Configuring the Home module

Procedure

1. On the **UI Configuration** tab, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. From the list of configured systems, agents, or profiles in the right pane, double-click an item in the list.
3. In the UI Configuration dialog box, click the **Home** tab.
4. In **Current home area** field, click the select (...) icon.

   The system displays the **File Selection** dialog box.
5. In the **Home areas files** field, select the real time view.
6. Click **Select**.
7. Click **OK**.

Configuring the Telephony module

Procedure

1. On the **UI Configuration** tab, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. From the list of configured systems, agents, or profiles in the right pane, double-click an item in the list.
3. In the UI Configuration dialog box, click the **Telephony** tab.
4. To select the current telephony module, do one of the following:
   - Select the **Default** check box.
   - In the **Current Telephony** field, click a quick bar file.
   - Select the **in the foreground with dialer calls** check box.
5. **(Optional)** To select a quick bar file, in the **Current Telephony** field, click the select icon ....
   a. In the **File Selection** dialog box, click a quick bar file.
   b. Click **Select**.
6. To select the current quick bar, do one of the following:
   - Select the **Default** check box.
   - In the **Current quick bar** field, click a telephony file.
7. **(Optional)** To select a telephony file, in the **Current quick bar** field, click the select icon ....
   a. In the **File Selection** dialog box, click a telephony file.
   b. Click **Select**.
8. Click **OK**.

Adding Autostart RT Information

Procedure

1. On the **UI Configuration** tab, click one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. From the list of configured systems, agents, or profiles in the right pane, double-click an item in the list.

3. In the UI Configuration dialog box, click the **Autostart RT Information** tab.
4. To add the autostart real time view, do one of the following:
   - Select the **Default** check box.
   - Clear the **Default** check box, and select a monitor file.
5. **(Optional)** To select a monitor file, click **Add**, and do the following:
   a. In the **File Selection** dialog box, click a file.
   b. Click **Select**.
6. Click **OK**.

Key and pie chart color

You can change the default colors and the key text color of certain real time views of system, profiles, and agents. However, you cannot change the color of the **Absent** state.

Color change affects the following real time views:

- Pie chart
- Agent status for AG (grid)
- Agent status for team (grid)
- Workplace status

You can change the default colors of the following states:

Agent Status	Background	Text
Present		
Break Time		
Non ACD active		
Free		
ACD active		

Changing the grid element color of system

Procedure

1. In the **UI Configuration** window, click **System**.
2. In the right pane, double-click **Default interface**.
3. In the UI configuration Default interface dialog box, click the **Realtime information** tab.

4. To change the color in **Color configuration for grid elements**, click one of the following:
   - **Background**.
   - **Text**.
5. In the Select Colors dialog box, select a color, and click **OK**.

   The system changes the color and displays a cross ☒ next to the color box.
6. **(Optional)** To restore the default setting, click the cross icon ☒.
7. Click **OK**.

Changing the grid element color of an agent

Procedure

1. In the **UI Configuration** window, click **Agent**.
2. In the right pane, double-click an agent in the list.
3. In the UI Configuration for Agent dialog box, click the **Realtime information** tab.
4. Clear the **Default** check box.
5. To change the color in **Color configuration for grid elements**, click one of the following:
   - **Background**.
   - **Text**.
6. In the Select Colors dialog box, select a color, and click **OK**.

   The system changes the color and displays a cross ☒ next to the color box.
7. **(Optional)** To restore the default setting, do one of the following:
   - Click the cross icon ☒.
   - Select the **Default** check box.
8. Click **OK**.

Changing the grid element color of a profile

Procedure

1. In the **UI Configuration** window, click **Profile**.
2. In the right pane, double-click a profile in the list.
3. In the UI Configuration for profile dialog box, click the **Realtime information** tab.
4. Clear the **Default** check box.

5. To change the color in **Color configuration for grid elements**, click one of the following:
    - **Background**.
    - **Text**.
6. In the Select Colors dialog box, select a color, and click **OK**.

    The system changes the color and displays a cross ☒ next to the color box.
7. **(Optional)** To restore the default setting, do one of the following:
    - Click the cross icon ☒.
    - Select the **Default** check box.
8. Click **OK**.

Configuring virtual agent groups

About this task

You can configure virtual agent groups in the Configuration module. You can also map agent groups to a virtual agent group.

Before you begin

Log in to IP Office Contact Center User Interface for Windows with administrator privileges.

Procedure

1. On the **Agent group** tab, click **Create virtual AG**.

    The system displays the **Virtual agent group – Create** dialog box.
2. In the **Name** field, type a name.

    For example, `ChromeAppAG`.
3. Click **OK**.

    The system adds the virtual agent group to the list of agent groups.

Next steps

Map agent groups to the virtual agent group.

Configuring customer details

About this task

The administrator can configure up to six information fields that you can see on incoming calls. You can configure the customer data at the agent, system, or profile level. Use this procedure to configure customer data in IP Office Contact Center User Interface for Windows application and view the customer details in Avaya Agent for Chrome – IP Office Contact Center User Interface application.

Before you begin

Log in to the application with administrator privileges.

Procedure

1. In **UI Configuration**, click **Agent**.
2. In the right pane, double-click an agent in the list.
3. In **UI Configuration for Agent**, click **Web UI agent**.
4. Clear the **Default** check box.
5. In the **Web UI agent** menu bar, click **Add**.
6. In the Tag selection dialog box, click a tag as required.
7. Click **OK**.
8. Type a name for the selected tag.
9. **(Optional)** To rename the tag, click **Rename**.
10. **(Optional)** To delete a tag, click **Remove**.
11. Click **OK**.
12. Log in with agent credentials to Avaya Agent for Chrome – IP Office Contact Center User Interface application.

    The system displays the customer details added to the **Call Details** tab.

Configuring web access

About this task

Use this procedure to configure web access in IP Office Contact Center User Interface for Windows application and use the web browser in Avaya Agent for Chrome – IP Office Contact Center User Interface application. You can configure web access at the agent, system, or profile level. You can configure up to three URLs.

Before you begin

Log in to the application with administrator privileges.

Procedure

1. In **UI Configuration**, click **Agent**.
2. In the right pane, double-click an agent in the list.
3. In **UI Configuration for Agent**, click **Web UI agent**.

4. Clear the **Default** check box.

   The list in the web access window is the default list set by the administrator at the system or profile level. When you clear the default check box, the system deletes all the lists from the Web Access window of that agent.
5. In the **Web UI agent** menu bar, click **Add**.
6. In the URL dialog box, do the following:
   a. In the **Address** field, enter the URL of a website.
   b. Select the option where you want to display this website.
   c. Click **OK**.
7. Type a name for the website.
8. **(Optional)** To delete a website, click **Remove**.
9. **(Optional)** To rename the website, click **Rename**.
10. **(Optional)** To modify the URL address or the display of the website, click **Edit**.
11. Click **OK**.
12. Log in with agent credentials to Avaya Agent for Chrome – IP Office Contact Center User Interface application.

    The system displays the configured websites in the **Call Details** tab.

Configuring the threshold

About this task

You can configure the threshold at the agent, system, or profile level. You can define the following values:

- **Min**
- **Max**
- **Warning**
- **Alarm**

Before you begin

Log in to the application with administrator privileges.

Procedure

1. In **UI Configuration**, click **Agent**.
2. In the right pane, double-click an agent in the list.
3. In **UI Configuration for Agent**, click **Web UI**.
4. Clear the **Default** check box.

5. Click a real time value, and click **Edit**.
6. In the Threshold dialog box, configure the values.
7. Click **OK**.

   The system displays the configured values.
8. To save the settings, click **OK**.
9. Log in with agent credentials to Avaya Agent for Chrome – IP Office Contact Center User Interface application.

   The system displays the configured threshold values in the **Groups** tab.

Configuring variables

About this task

If the Variable tag type is a number, you can assign a minimum and a maximum value. You can configure the threshold at the agent, system, or profile level.

Before you begin

Log in to the application with administrator privileges.

Procedure

1. In **UI Configuration**, click **Agent**.
2. In the right pane, double-click an agent in the list.
3. In **UI Configuration for Agent**, click **Web UI**.
4. Clear the **Default** check box.
5. In the **Variables** menu bar, click **Add**.
6. In the Variables dialog box, click a variable.
7. Click **OK**.
8. Type a name for the variable.
9. **(Optional)** To delete a variable, click **Remove**.
10. **(Optional)** To rename the variable, click **Rename**.
11. To change the values, click **Edit**.

Chapter 12: Additional administration modules

Administration task bar

The **Administration** area lists the modules in the IP Office Contact Center system. You can select and work with different modules.

Note:

You must have the necessary privileges to view and use the modules in the **Administration** area. Each module has a number of privileges that defines the functions that you can use in the module.

The Administration area displays the modules in the task bar with the following icons:

Icon	Name	Description
	Configuration	Configures all objects of the IP Office Contact Center system and the system settings.
	UI Configuration	Configures the contact bar and selects a real time view for the Home and Telephony modules.
	Task Flow Editor	Creates a task flow set. A task flow set is a graphical representation of message distribution within the IP Office Contact Center system.
	IVR Editor	Creates IVR scripts.
	Dialer	Works in the outbound area.
	Email Configuration	Configures email settings.
	Textblock Administration	Creates and updates the textblocks and templates that the agents use in the Email module.
	Address Book Administration	Configures the address books.

Configuration module

The Configuration module is the central module for configuring objects in the IP Office Contact Center system.

You can also use the Configuration module to configure the system settings, change the configurations, and delete objects in IP Office Contact Center.

Task Flow Editor module

The Task Flow Editor module controls the configuration of the routing of voice, email, and chat tasks within the IP Office Contact Center system. A task flow set is a graphical representation of the message distribution within IP Office Contact Center. The messages can be phone calls, voice mails, or emails. The message distribution determines how IP Office Contact Center handles the messages within the system, and the processes that the system starts. You can use the module to create a task flow set. The Task Flow Editor module uses icons to display a task flow.

A task flow set has two groups:

- Macro
- Task flows

You must use a macro to use the same process in more than one task flow without creating the sequence of processes again in each task flow. After creating a task flow, you can do the following:

- Start
- Set as the default
- Print
- Export

IVR Editor module

The IP Office solution includes voice control or Interactive Voice Response (IVR) to provide customer services such as automatic announcements, Text To Speech(TTS), and speech recognition. The IVR function includes the following:

- DTMF tone recognition for evaluating subscriber entries.
- Text to speech to enable the read out loud feature for text.

  Microsoft TTS (Speech Platform 11) that is integrated into the system to enable TTS.
- Announcement creation with `.WAV` files or TTS. You can write TTS text in a script element, a text file, or a CallTag.
- Voice mail recording and distribution. You can also forward the voice mails to an agent through email.
- Read and write access to content stored in external databases.
- Script features, such as create scripts and add or edit elements.

- Telephony functions with querying elements, such as call, refer back, and transfer.

In IP Office Contact Center, you can install the IVR editor module together with the UI. The IVR Editor module is an optional application. You can use the Configuration module to configure the Voice Control environment.

When using a Voice Control standalone system, you have to install the IVR Editor module on a client application or the server. For a Voice Control standalone system, you can also configure the IVR settings with the IVR Editor module.

You can use the Interactive Voice Response (IVR) Editor tool to create and edit the Voice Control IVR scripts for IP Office Contact Center. You can access IVR Editor in the user interface of the **Administration** menu.

IVR scripts contain the following information:

- Description of a requested process
- Specification of what to do with a connection
- Announcements played to callers
- Options for callers
- Specification of how to handle caller entries, such as voice mails and database entries

Dialer module

Outbound dialer is the IP Office Contact Center function that starts automatic outbound calls. In an outbound call, an agent need not call a subscriber of the public network. For example, If you conduct a phone survey within a company, then the survey can be an outbound function.

Depending on the dialer mode, the IP Office Contact Center outbound dialer does one of the following tasks on connection:

- Starts the call from IP Office Contact Center, and then distributes the call to an available agent.
- Presents the call to an agent for preview, and then the agent starts the call.

In IP Office Contact Center, the basis of the call distribution process is jobs. The system starts a job for a topic.

Similar to the inbound function the programmable call distribution, task flow set, controls the outbound function. You can monitor the status of an outbound call, but you cannot change the call distribution process.

Apart from increasing the productivity of the agents, the system uses the IP Office Contact Center outbound functionality for the following:

- Informational campaigns
- Advertising campaigns
- Callback requests

Error list module

The Error list module displays IP Office Contact Center system messages. Only system administrator need the error list messages.

Related links

Opening the Error list module on page 239

Opening the Error list module

Before you begin

Get minimum one of the following privileges:

- Real time information
- Configuration
- Task Flow editor
- Dialer
- IVR editor
- Wallboard

Procedure

Do one of the following:

- On the task bar, below **Administration**, click **Error list** icon ( ).
- On the **Go to** menu, select **Error list**.

The system displays the error list with the following information:

- **Date/Time**: The date and time at which the event occurred.
- **Code**: A message code.
- **Description**: A description of the message code.

Note:

To interpret the messages, contact your system administrator.

Related links

Error list module on page 239

Email and chat configuration module

IP Office Contact Center agents and supervisors can communicate with their call center customers using email and instant messaging (IM).

> **Important:**
>
> Email and IM are not currently supported in Avaya Agent for Chrome – IP Office Contact Center User Interface.

Administrators must configure email and IM capabilities in the IP Office Contact Center interface. You require multichannel agent licenses for the agents and agent groups that will be using the email and IM features.

In IP Office Contact Center, you must do the following:

- Ensure appropriate access privileges are assigned to agents. These privileges determine the types of email and chat features that agents can access.
- From the Configuration module, create email and chat topics.
- Create email and chat flows in Task Flow Editor.
- Add required email and chat scripts to topics.

For detailed instructions on email and chat configuration, see *Avaya IP Office Contact Center Email and Chat Services*.

Related links

Creating keyword-based email routing task flow on page 240

Creating keyword-based email routing task flow

About this task

You can create a task flow that distributes emails based on the words in the email. You must configure a script and create an email flow to create this task flow. The script can contain up to 10 keyword patterns with each containing 200 keywords. The system evaluates each keyword pattern separately. The system executes the script checking the text of the email for designated keywords. If the system finds a match, then the system sets the special task tag to true.

Before you begin

- Get the required privileges.
- Start the IP Office Contact Center user interface.
- Get the email keyword search privilege.

Procedure

1. To create a script, do the following:
    a. On the **Go to** menu, click **E-mail configuration**.
    b. Click the **E-Mail textsearch** tab.
    c. Click **Add**.
    d. In the **Configuration name** field, enter a name for the script.

Note:

The script name can contain up to 29 alphanumeric characters.

e. To add a keyword pattern, click **Add**.

Note:

The patterns can include special characters.

The system displays the **Edit configuration** dialog box.

f. To edit a keyword pattern, click the **Edit** icon ( ).

The system displays the **Keyword pattern** dialog box.

g. In the **Keyword** field, enter the keyword.

h. Click **Apply**.

The system updates the selected keyword pattern.

i. Click **Apply**.

The system displays the script in the **Configurations** field.

j. Click **Save**.

2. To test the keyword pattern, do the following:

a. Select a script, and then click **Edit** icon ( ).

b. In the **Edit configuration** dialog box, click **Test**.

The system displays the **Test configuration** dialog box.

c. In the **Enter text** field, enter a text message.

d. Click **Test**.

If matches are found, the system displays the corresponding keyword pattern with Task Tags. If no matches are found, the system displays the following message:

```
No match found!
```

e. Click **Close**.

f. Click **Apply**.

3. To create an email task flow, do the following actions:

a. On the **Go to** menu, click **Task Flow Editor**.

b. Click **Edit** > **New** > **Email Flow**.

The system displays the **New E-mail flow** dialog box.

c. Enter the required details and click **OK**.

d. On the **List of symbols**,no do the following:

a. Drag **Destinations** > **E-mail script** to the script, and select an email script.

b. Drag **Task conditions** > **Task Tag** to the script, and select a task tag.

The system creates an email task flow with an email script and a task tag.

e. Click **Task flow set** > **Save**.

The system saves the email task flow.

f. Click **Task flow set** > **Activate**.

The system activates the email task flow.

Note:

The system sets the task tags *UM_ScanResult* to true or false. For example, the system sets *UM_ScanResult1*. The system can evaluate these task tags in the taskflow. A *TaskTrap* element after the email script element is unnecessary.

Related links

Email and chat configuration module on page 239

Textblock Administration module

The Textblock Administration module is a web user interface. You can use the Textblock Administration module to create and update the text blocks that agents use in the email module. You can also create an autoreply template and assign it to topics.

- Create, change, and delete textblocks.
- Create textblocks in international languages.
- Rename textblocks.
- Arrange the textblocks in a category.
- Format textblocks.
- Assign textblocks to topics.
- Create, change, and delete autoreply templates.
- Assign an autoreply template to a topic.
- Use placeholders in textblocks and autoreply templates.

Limitations

The limitations of the Textblock administration module are:

- Perform drag-and-drop operations.
- Integrate graphics in the textblocks or autoreply templates.
- Add attachments to the textblocks or autoreply templates.

Address book administration module

An address book consists of customer details. You can configure an address book with details such as the name, phone number, or fax number. In IP Office Contact Center, the email module integrates with the address book functionality. The address book server provides the address books that the system displays in the email module.

In the email module, an agent can use the address book that the address book server configures for the agent. You can use the Address Book administrator module, which is a web user interface, to change the configuration of the address book server.

- Add, change, and delete address books.
- Add, change, and delete address book profiles.
- Edit the settings of the address book server.
- View the import log.

You cannot use the drag-and-drop function in the Address Book administrator module.

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