



# **IP Office Contact Center – Telephony User Interface Configuration Task Based Guide**

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# IP Office Contact Center Telephony User Interface

## Overview

This guide includes examples relating to the configuration of a Telephony Agents Telephony Interface. The configuration of Text Elements, List Elements, Graphics Elements and other elements is considered.

This guide outlines the layout of the Telephony User Interface and the creation of Agent Profiles.

It also examines and lists the Privileges and Authorizations that can be assigned to agents by an administrator.

For details relating to the Reporting and the Supervisor interface, please refer to the IP Office Contact Center Reporting Task Based Guide.

For details relating to the Dialer interface and configuration, please refer to the IP Office Contact Center Dialer Configuration Task Based Guide.

For details relating to the Email and Chat interface and configuration, please refer to the IP Office Contact Center Email and Chat Service Task Based Guide.

The IP Office Contact Center User Interface software must be installed on Agent and Supervisor PC's. If an agent or supervisor does not have the application installed on their PC, they cannot sign on to IP Office Contact Center.

There are three types of IP Office Contact Center Users

- Agents – receive and make calls, they potentially receive emails and use Chat features.
- Supervisor – Monitor agents call activity. Customize real time information and produce reports and call statistics.
- Administrator – Administers the IP Office Contact Center system, creates and adapts Topics, Call Flows and IVR Scripts. They would also administer the Chat and Email capabilities of IP Office Contact Center.

The same application is used for agents, supervisors and administrators of IP Office Contact Center. However, users can be assigned certain privileges which determine what features they can view, administer and configure from the User Interface. Profiles can be assigned to differing groups of users providing those users with assigned privileges.

The IP Office Contact Center User Interface is used to produce historical reports and view Real Time call information.

Depending on the privileges and authorizations assigned, the IP Office Contact Center User interface can provide Call Control, Email and Chat features.

## **IP Office Contact Center User Interface Required Information**

For a successful User Interface installation to take place, there are a number of configuration parameters and details that should be obtained and checked with the customer. These include:

- Does the user have administrative privileges to allow the User Interface to be installed on their PC?
- Does the customer require that the IP Office Contact Center Software be associated with the user's Windows account? i.e. so that they can automatically sign on to IP Office Contact Center
- Will agents be assigned against IP Office Contact Center Profiles?
- If so, which agents will be assigned to each profile?
- What privileges will be assigned to the Profile?
- If agents are not assigned to profiles, what privileges will be assigned to individual agents?

The IP Office Contact Center User Interface is supported in the following languages:

- Italian
- European French
- Latin American Spanish
- German



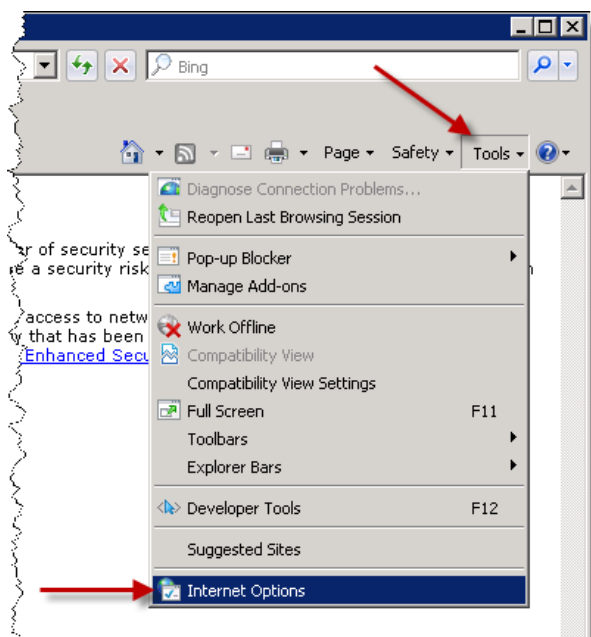
## IP Office Contact Center Agent PC Requirements

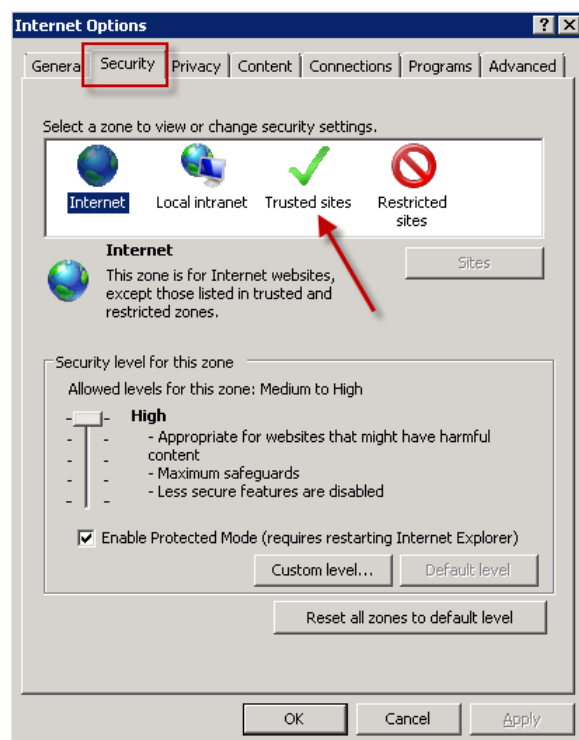
IP Office Contact Center user's PC's must meet the following minimum requirements

Agent PC Requirements	
Hardware	
RAM	Min 4GB
Hard Disk Free Space	Min 10GB
Connectivity	Ethernet Adapter
Processor	
Minimum processor speed	Intel Pentium 4 processor 2.2 GHz or higher
Client Operating System	
Operating System	Microsoft® Windows 7, or Windows 8.1
Web Browser	
Microsoft® Internet Explorer 8.x or higher	Mozilla Firefox 3.6 or higher

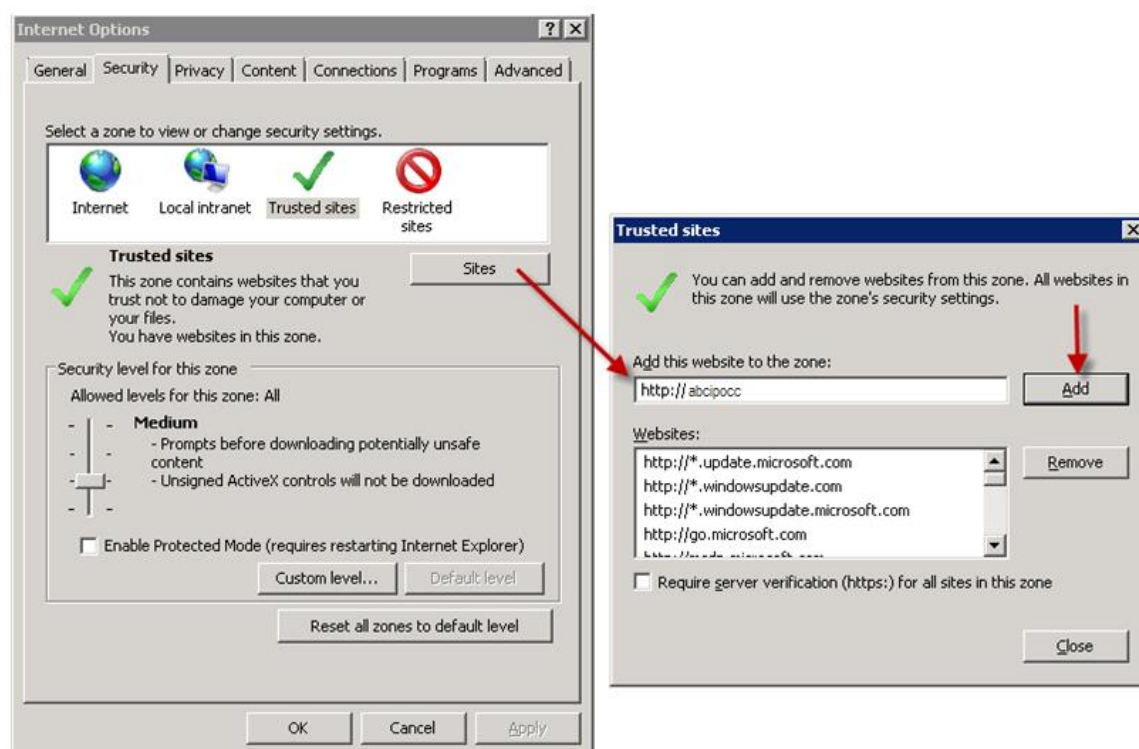
To add the server as a trusted site to Internet Explorer:

1. Open Internet Explorer and select **Internet Options**.



2. Click the **Security** tab followed by **Trusted Sites**.3. Click the **Sites** button and add the hostname of the server in the following format: <http://<hostname>>

**Note:** the server name in the screen capture below is for illustrative purposes only.

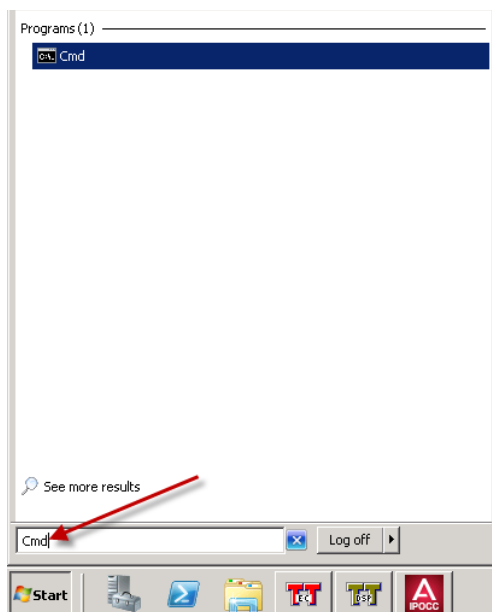


## Adding the Server's Host Name to the IP Office Contact Center User PC's Host File

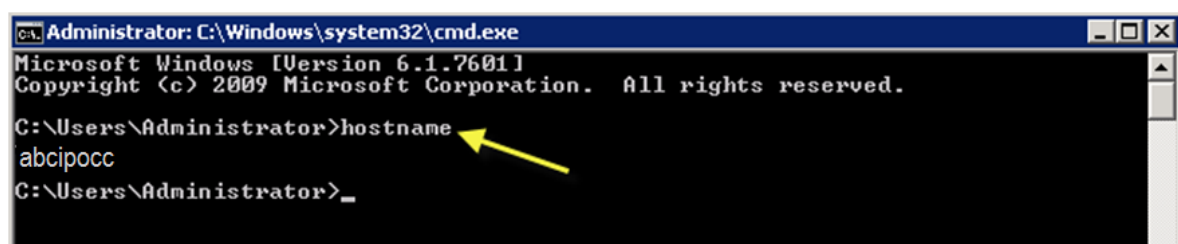
Each IP Office Contact Center User's PC must have the IP Office Contact Center server's host file amended to reference the IP Office Contact Center server's Hostname.

The server's hostname can be checked from the server's command line by an IP Office Contact Center administrator:

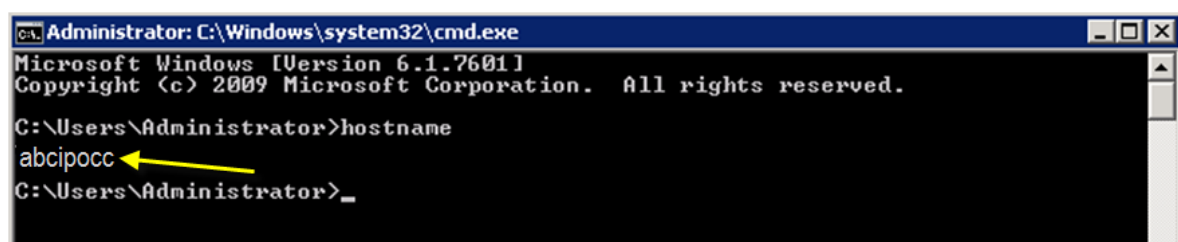
1. Login to the server and from the start menu type cmd in the search box and press enter.



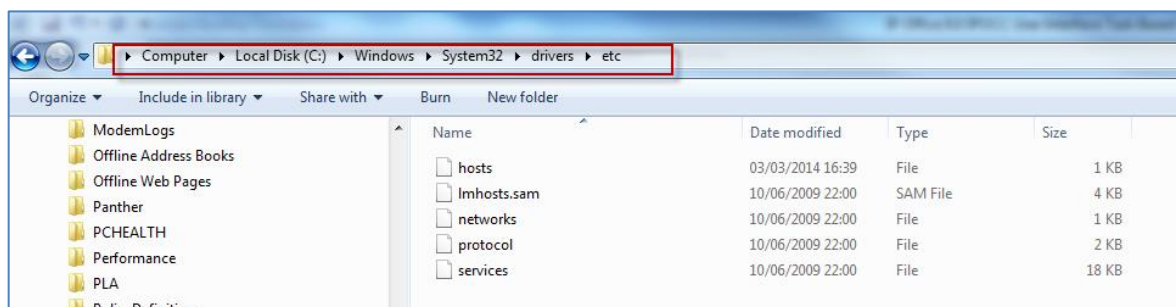
2. Type hostname after the prompt.



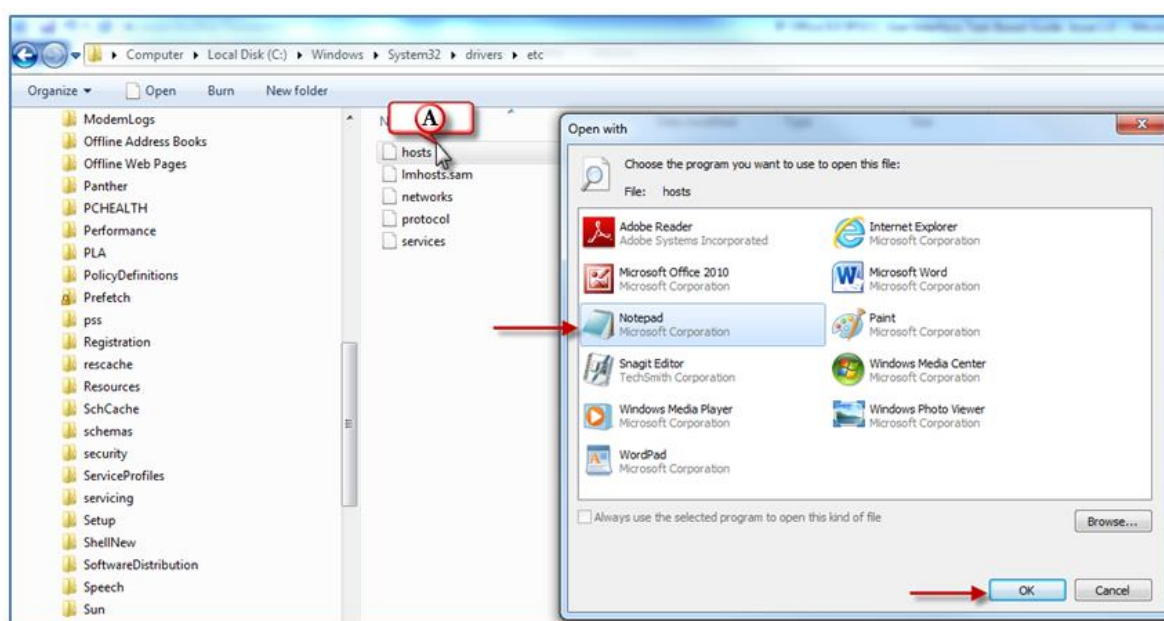
3. The server's hostname is displayed. In this example the server's host name is abcipocc



4. The host name of the server should be added to each IP Office Contact Center users PC. Navigate to C:\Windows\System32\drivers\etc.

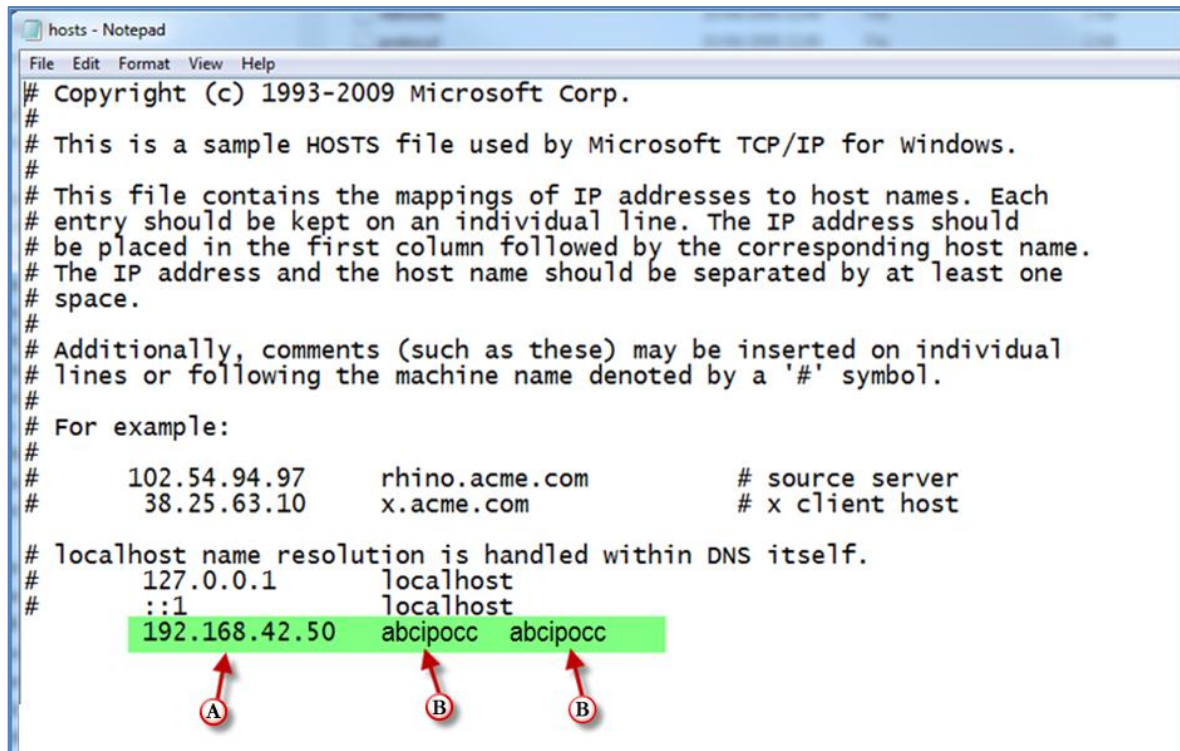


5. Right click on the **hosts** file and open with for example notepad.



- A. Right click

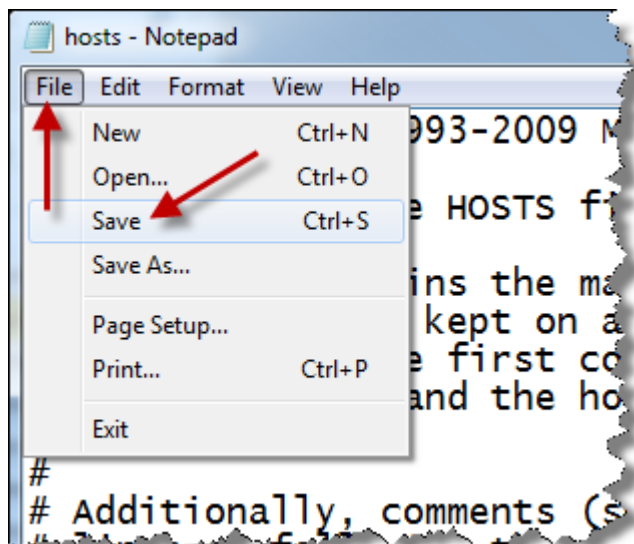
6. Add the server's IP Address and host name details in the following format, for example 192.168.42.50 abcipocc abcipocc



```
# Copyright (c) 1993-2009 Microsoft Corp.
#
# This is a sample HOSTS file used by Microsoft TCP/IP for Windows.
#
# This file contains the mappings of IP addresses to host names. Each
# entry should be kept on an individual line. The IP address should
# be placed in the first column followed by the corresponding host name.
# The IP address and the host name should be separated by at least one
# space.
#
# Additionally, comments (such as these) may be inserted on individual
# lines or following the machine name denoted by a '#' symbol.
#
# For example:
#
#       102.54.94.97       rhino.acme.com       # source server
#       38.25.63.10       x.acme.com           # x client host
#
# localhost name resolution is handled within DNS itself.
#       127.0.0.1         localhost
#       ::1               localhost
#       192.168.42.50     abcipocc abcipocc
```

- A. IP Office Contract Center Server's IP address.
- B. IP Office Contract Center Server's Host Name

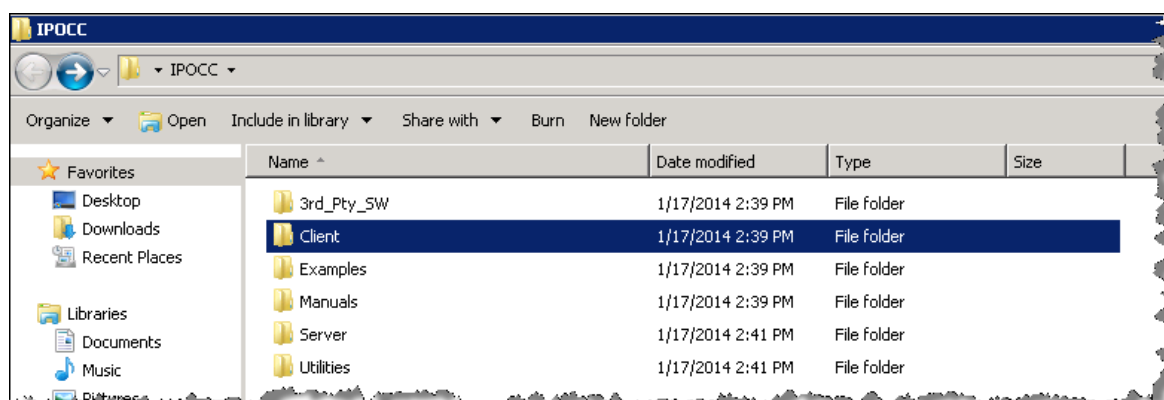
7. Save the changes to the host file.



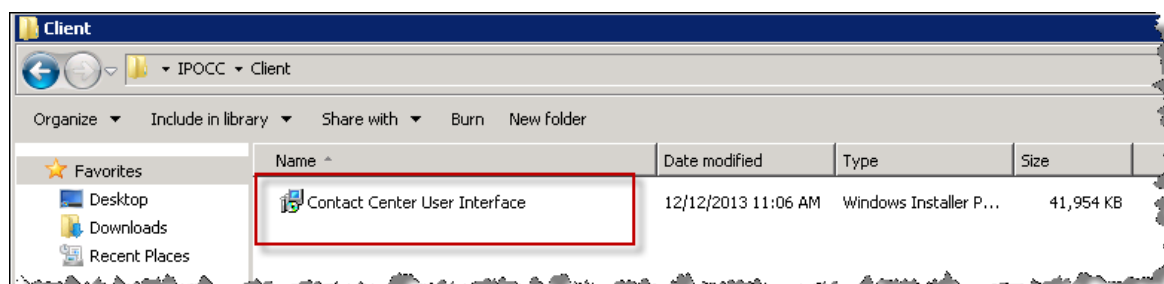
## Installing the Contact Center User Interface on Agent PC's

The Contact Center User Interface has to be installed on each agent's PC. If the software is not running on the agents' PC the agent information will not be displayed in IP Office Contact Center Real Time screens or Reports.

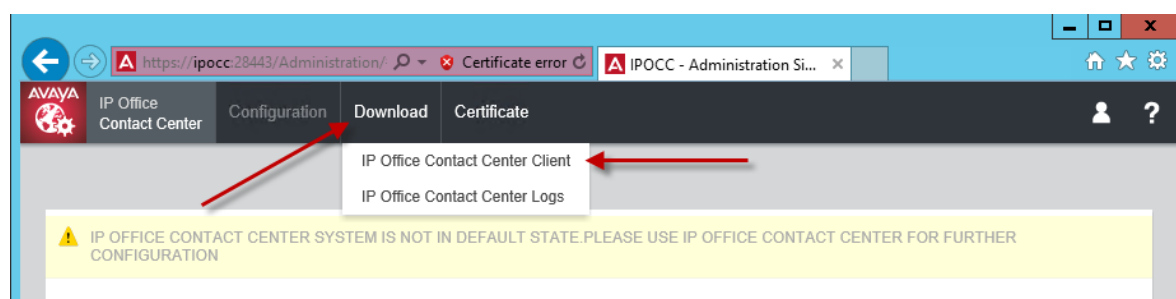
1. The software can be found on the IP Office Contact Center installation CD within the **Client** folder.



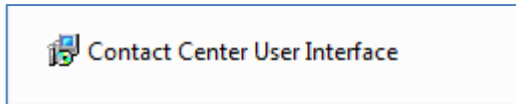
2. Copy the software on to each agents PC.



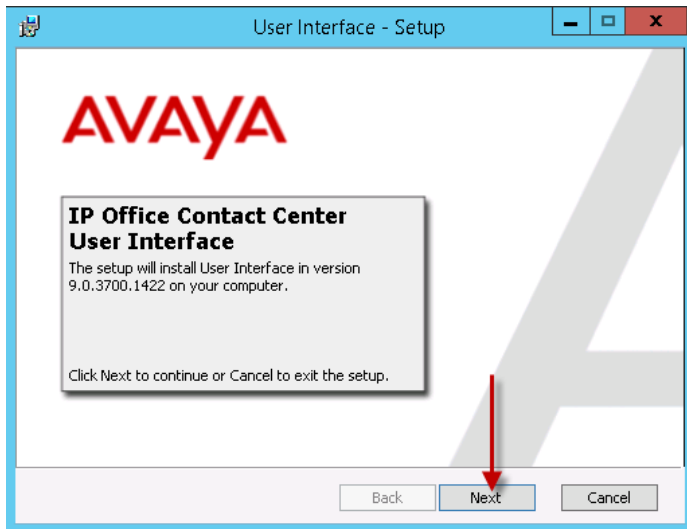
**Note:** It can also be downloaded from the **IP Office Contact Center Administration Page Download Link**. Click the **Download** link, followed by **IP Office Contact Center Client**. Please refer to the IP Office Contact Center Installation Task Based Guide for further details.



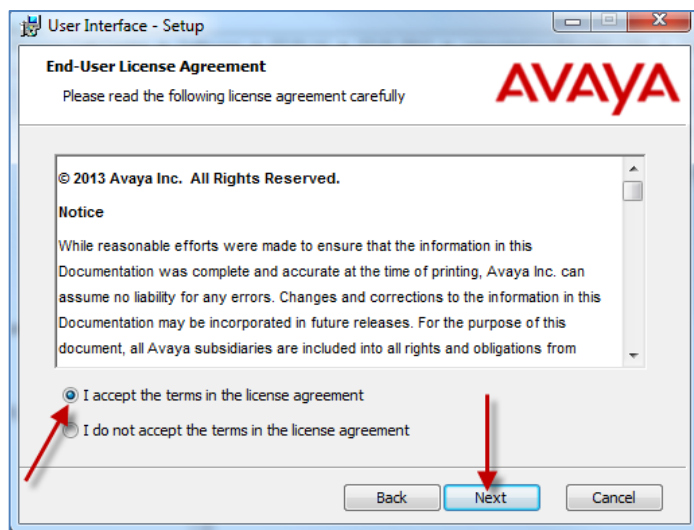
3. Double left click on the installation file.



4. The setup wizard is displayed. Click **Next**.

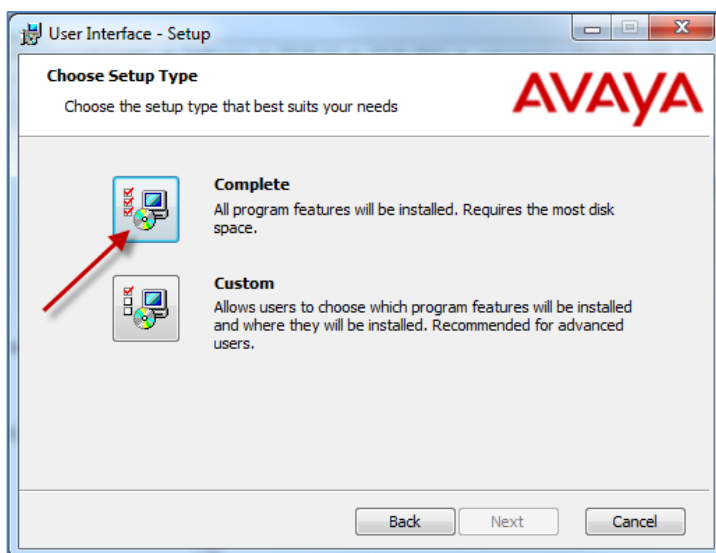


5. Accept the License Agreement and click **Next**.

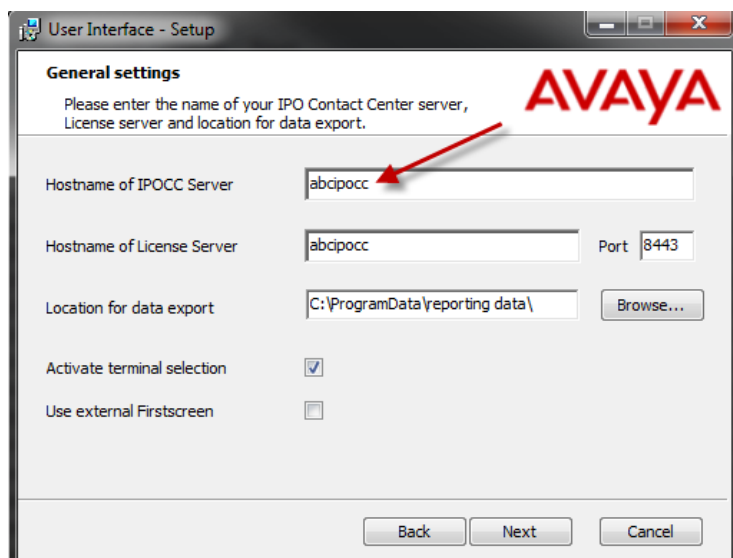


6. Click the **Complete** button.



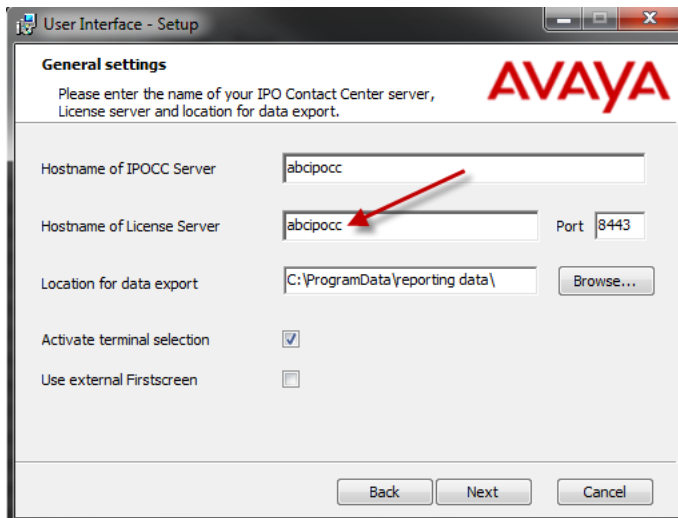


7. Enter the **Host Name** of the IP Office Contact Center server in the **Hostname of IP Office Contact Center Server** field.



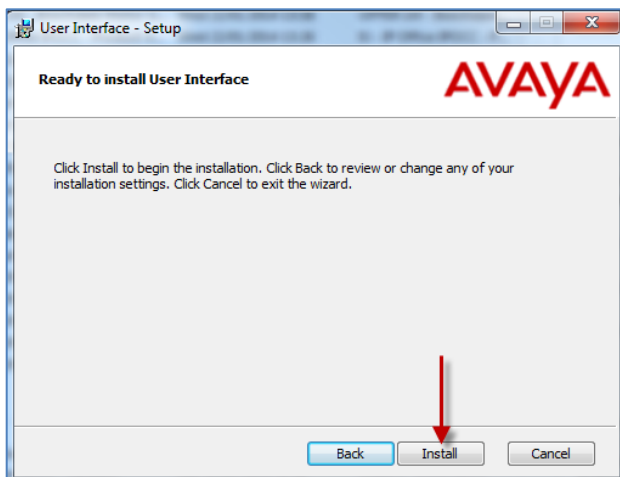
8. Enter the Host Name of the IP Office Contact Center server in the **Hostname of License Server** field.



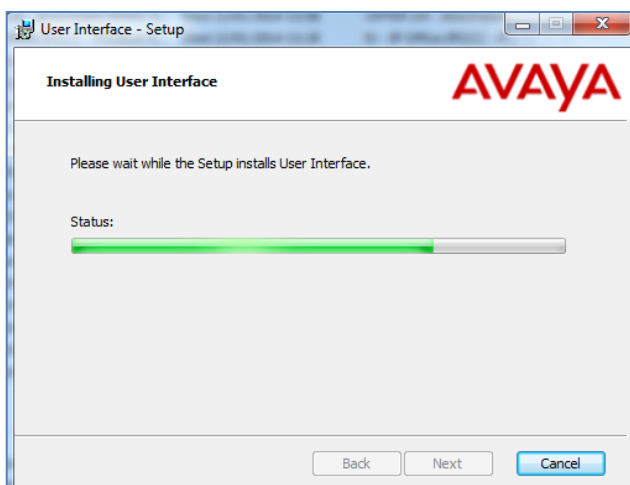


9. All of the other settings can be left in their default state. Click **Next**.

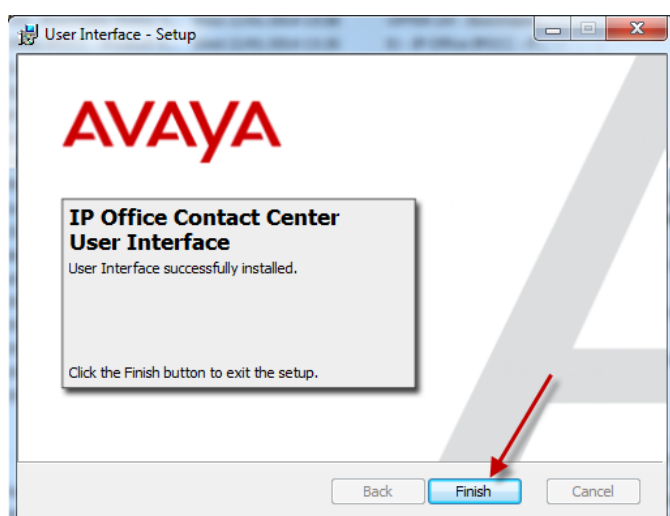
10. Click the **Install** button.



11. The installation will proceed.



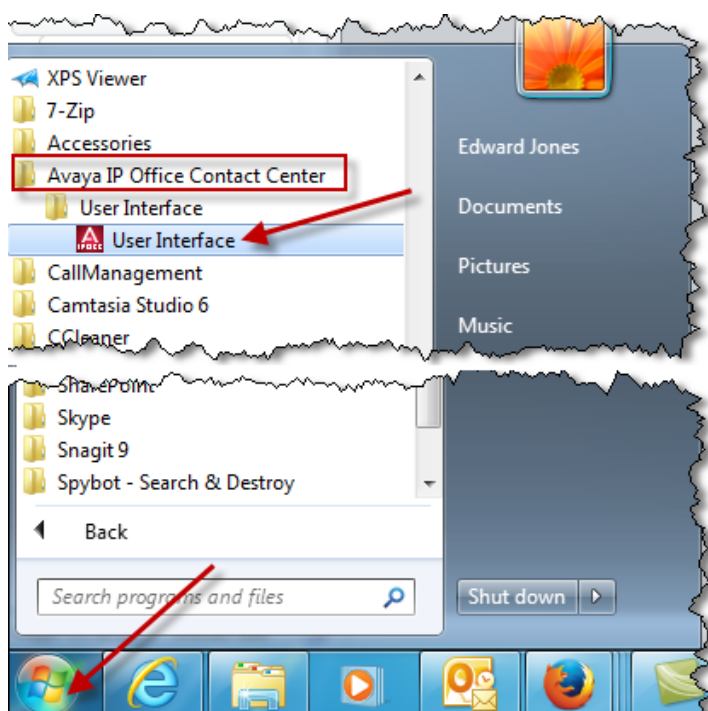
12. Click the **Finish** button.




## Logging into the User Interface

To login to the User Interface:

1. From the start menu, select **Avaya IP Office Contact Center**, open the **User Interface** folder and double click on the **User Interface** icon.



2. The User interface sign in screen is displayed.



The image shows the Avaya IP Office Contact Center login interface. At the top is the red Avaya logo. Below it is the title "IP Office Contact Center". The login form consists of three fields: "Username" (a dropdown menu), "Password" (a text input field), and "Telephone Extension" (a dropdown menu showing "<None>"). To the right of these fields are two buttons: "Login" (yellow) and "Exit" (blue). The entire form is enclosed in a blue border, and there is a dark grey footer bar at the bottom.

3. In the **Username** field, enter the user name that has previously been configured for this agent.



This image is similar to the previous one, showing the Avaya IP Office Contact Center login interface. However, the "Username" dropdown menu now displays "Agent1". A red arrow points to the "Agent1" text in the dropdown. The "Password" and "Telephone Extension" fields remain empty, and the "Login" and "Exit" buttons are still present. The interface is framed by a blue border and a dark grey footer bar.

4. From the **Telephony Extension** drop down box, select the extension to be used by this agent.

AVAYA

IP Office Contact Center

Username

Password

Telephone Extension

Login Exit

5. Enter the password for the user in the **Password** field.

**Note:** To sign in as an Administrator, the default User name and Password is **Administrator**. IP Office Contact Center users do have a password by default (See IP Office IP Office Contact Center Installation Task Based Guide). The Administrator can change the default password for an Agent or Supervisor.

AVAYA

IP Office Contact Center

Username

Password

Telephone Extension

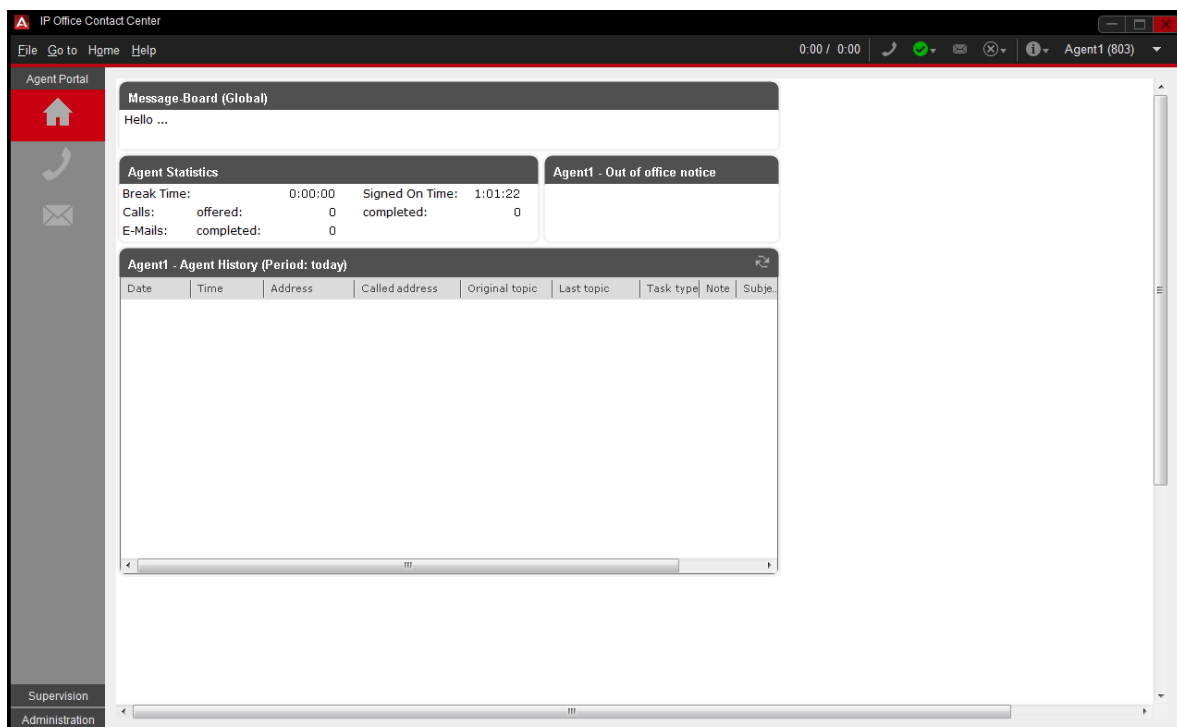
Login Exit

6. Click the **Login** button.

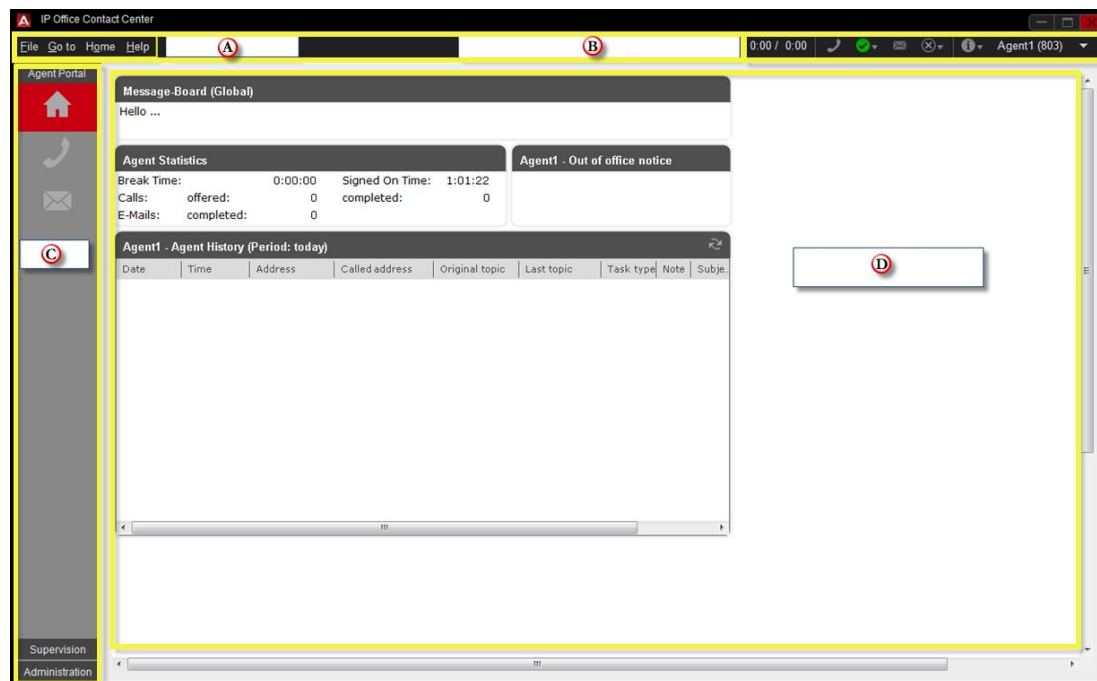


The image shows the login screen for the IP Office Contact Center. At the top is the AVAYA logo in red. Below it is the text "IP Office Contact Center". There are three input fields: "Username" with a dropdown menu showing "Agent1", "Password" with a masked field of dots, and "Telephone Extension" with a dropdown menu showing "803". To the right of these fields are two buttons: "Login" and "Exit". A red arrow points to the "Login" button.

7. The IP Office Contact Center user Interface is displayed.

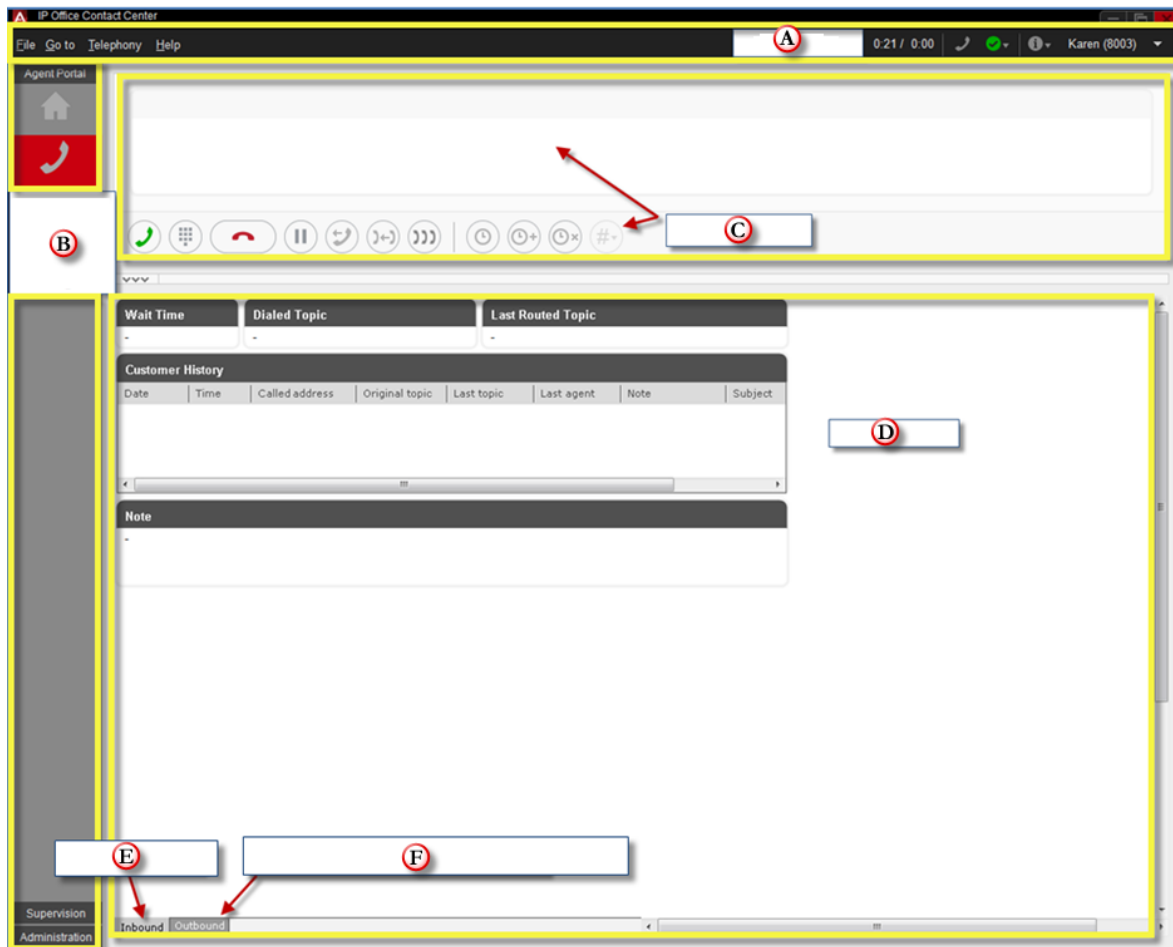


## IP Office Contact Center User Interface Layout



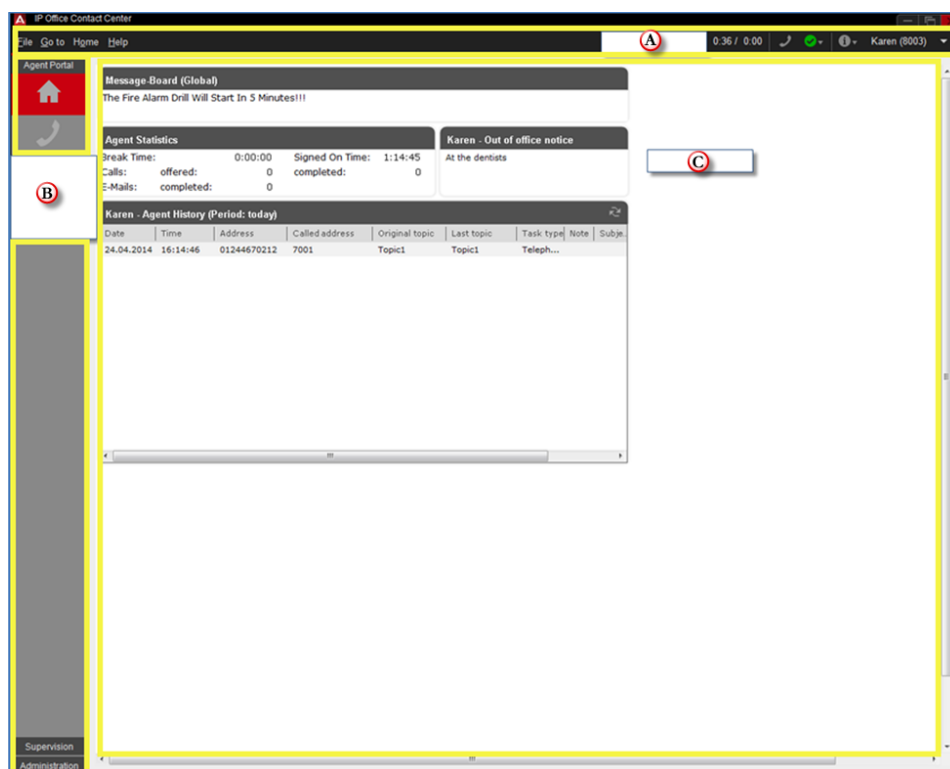
- A. Menu Bar
- B. Status Icons for Telephony, Email and Chat.
- C. Task Bar
- D. Work Area

## Telephony View



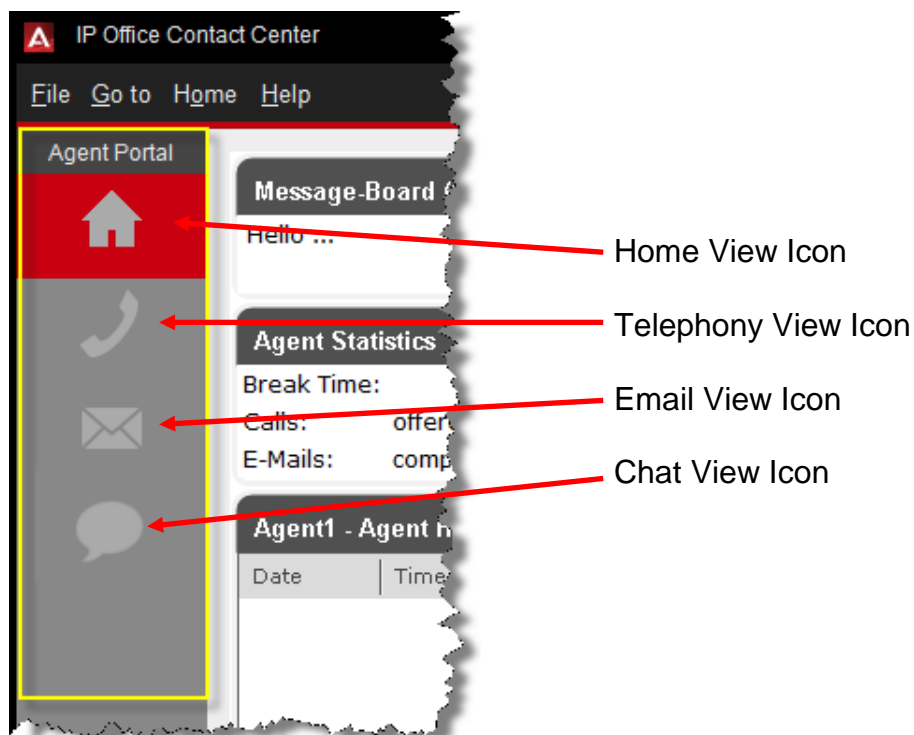
- A. Menu Bar,
- B. The Task Bar can include Email and Chat Modules, if configured.
- C. Contact Bar
- D. Work Area
- E. Inbound Page
- F. Outbound Page (Used with the Dialer).

## Home View



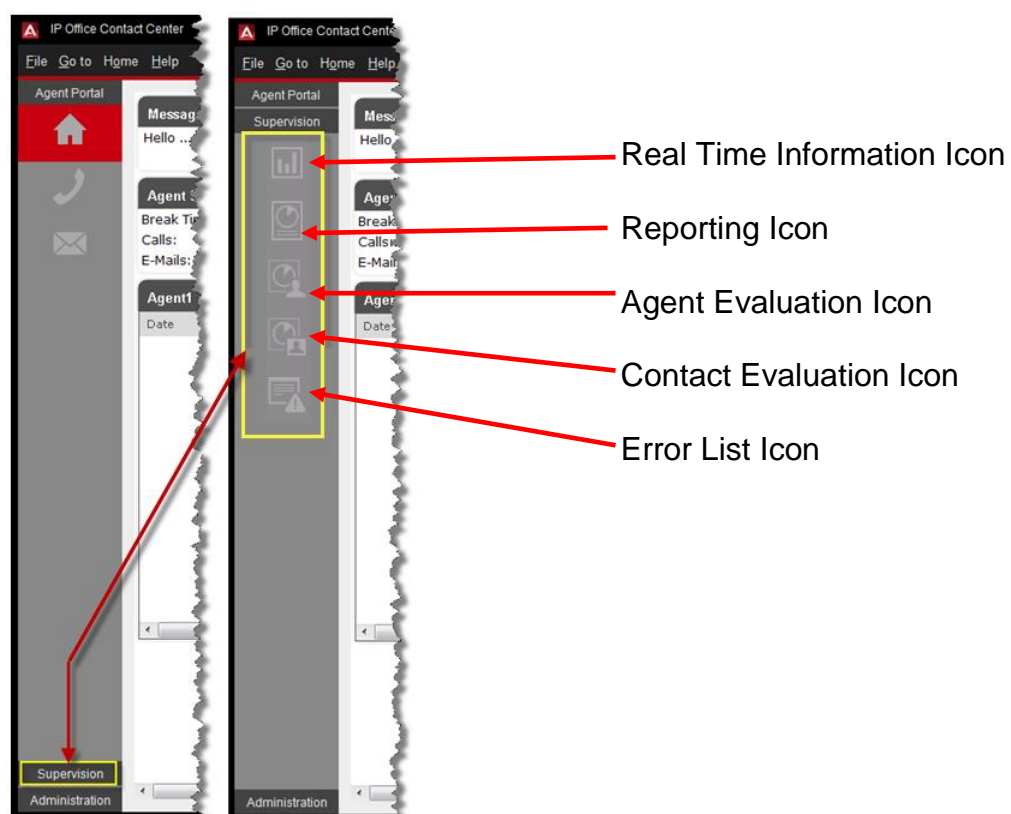
- A. Menu Bar
- B. The Task Bar can include Email and Chat Modules, if configured.
- C. Work Area.

## Customer Service Task Bar

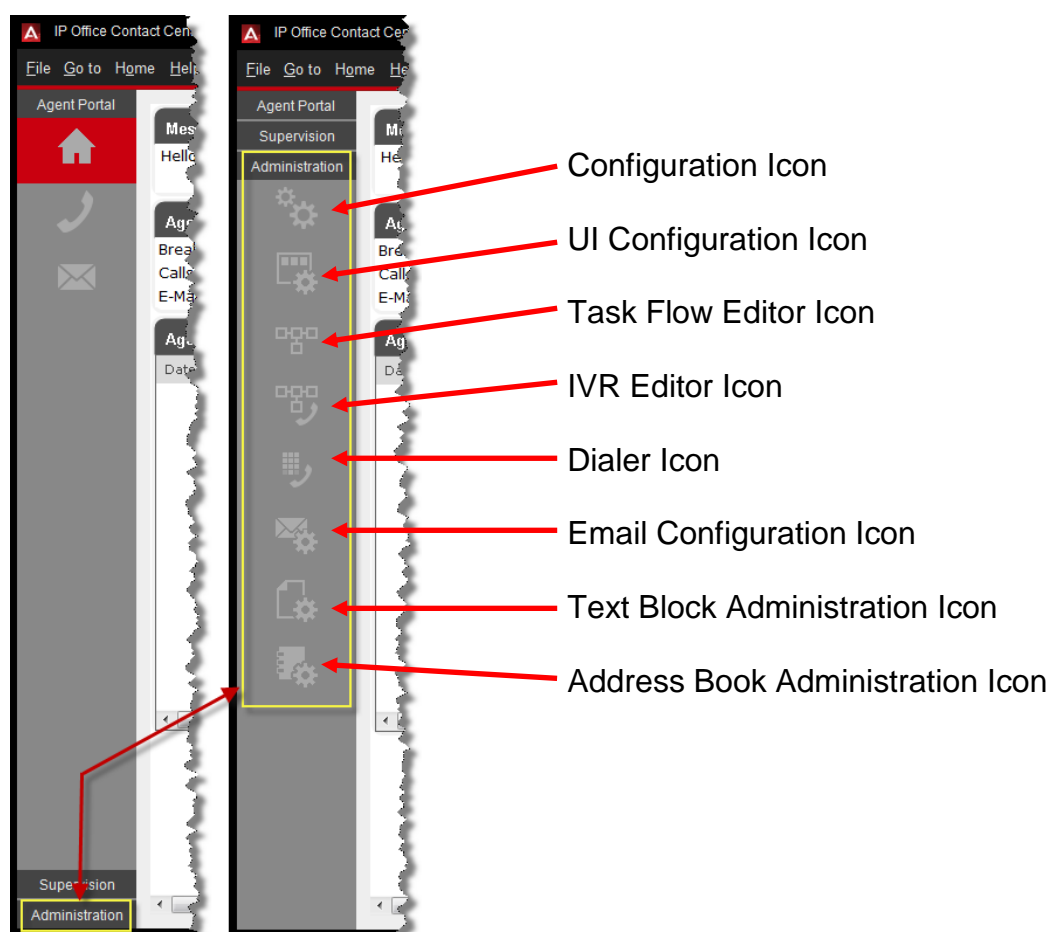




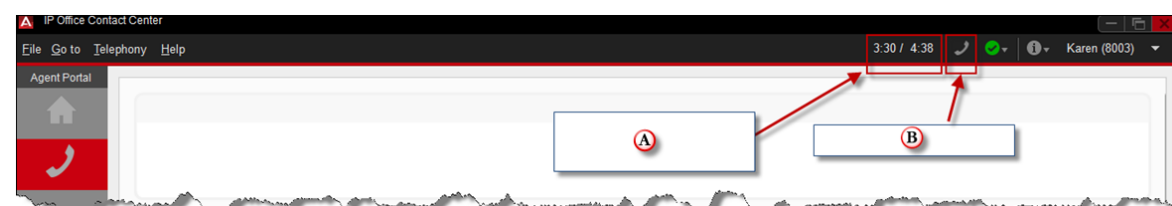
## Supervision Task Bar



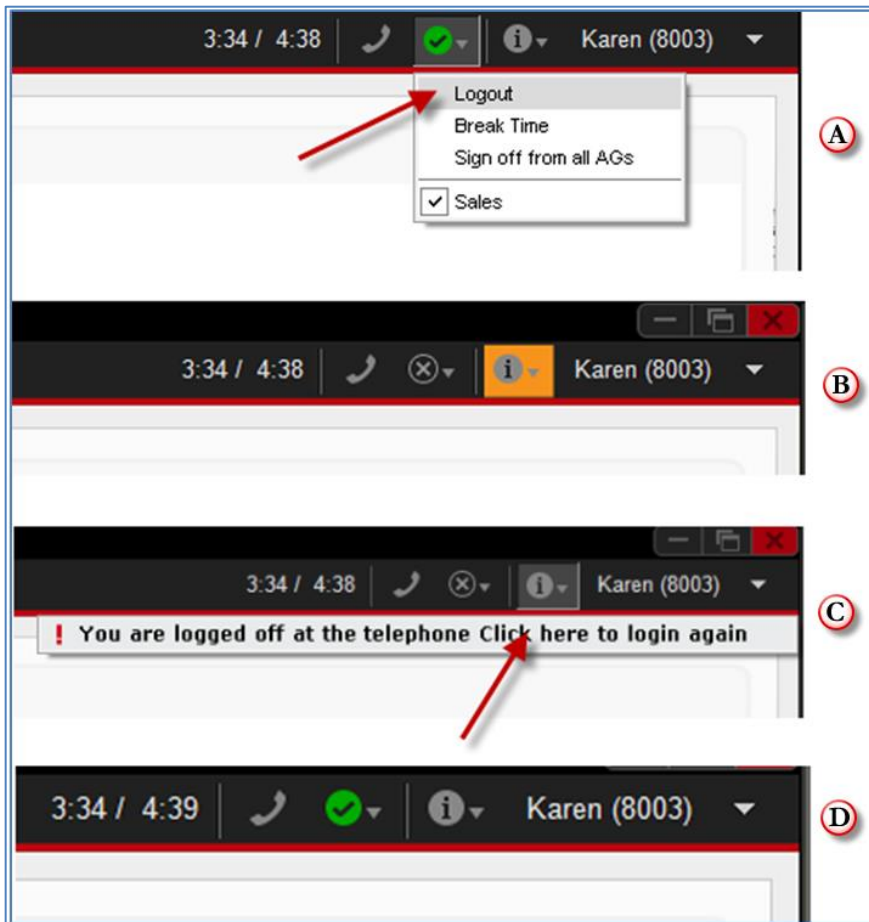
## Administration Task Bar



## Menu Bar

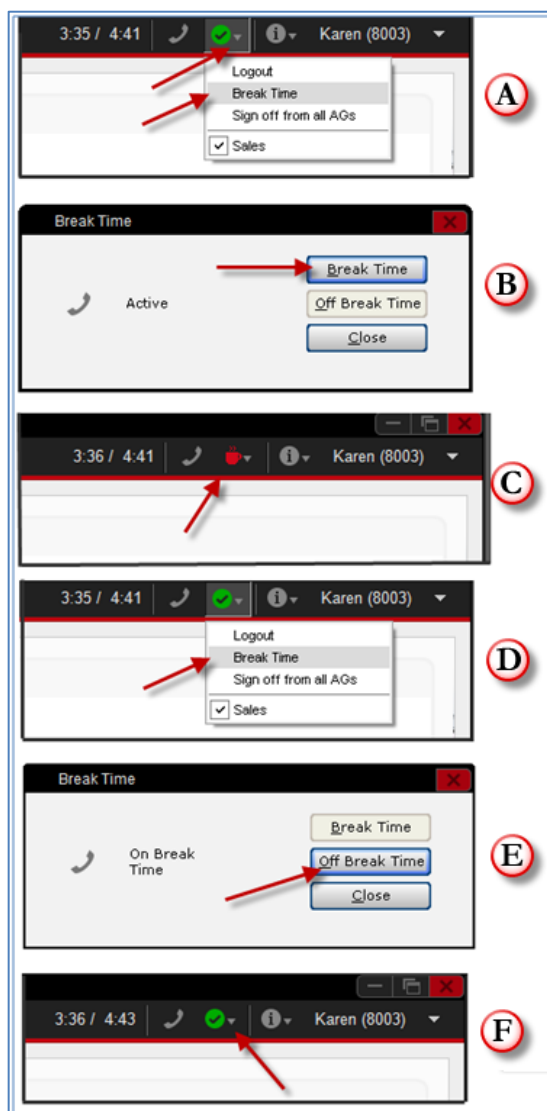


## Logout/In



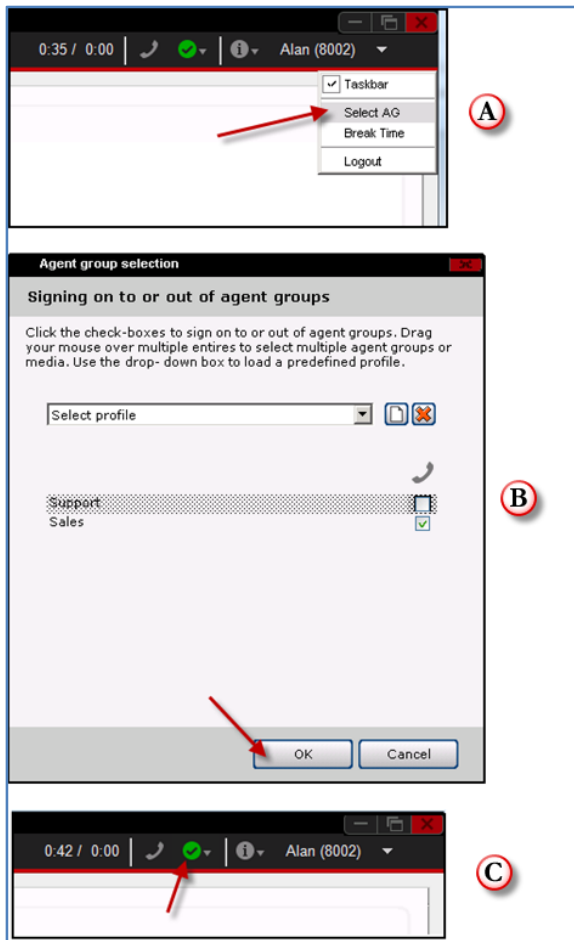
- A. To Log Out, click on the drop down arrow and select Logout
- B. Logged Out Status
- C. Click to Log back into IP Office Contact Center
- D. Logged in Status

## Break Time



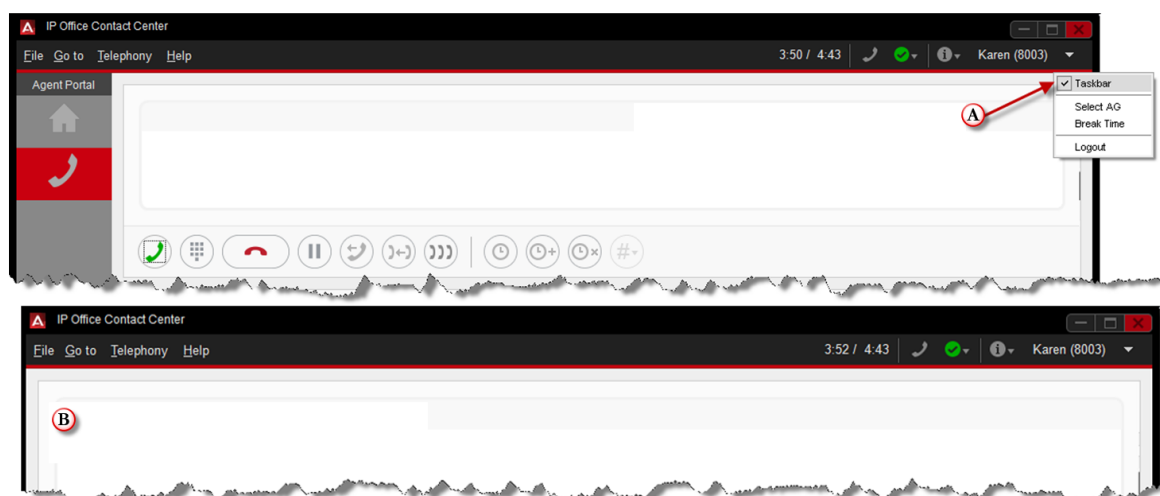
- A. To access Break Time, click the drop down arrow and select **Break Time**.
- B. Click **Break Time**
- C. Break Time Status
- D. To Exit Break Time, select **Break Time**
- E. Click **Off Break Time**
- F. Agent Available Status

## Agent Group Selection



- A. To select which Agent Group to sign into, click Select AG.
- B. The Agent Groups that the agent has been assigned to are displayed. Select the Agent Group to which the agent will log into Click OK.
- C. Agent's Logged in Status.

## Additional Features



- A. To hide the Task bar, deselect Taskbar
- B. The Task Bar is hidden from view.

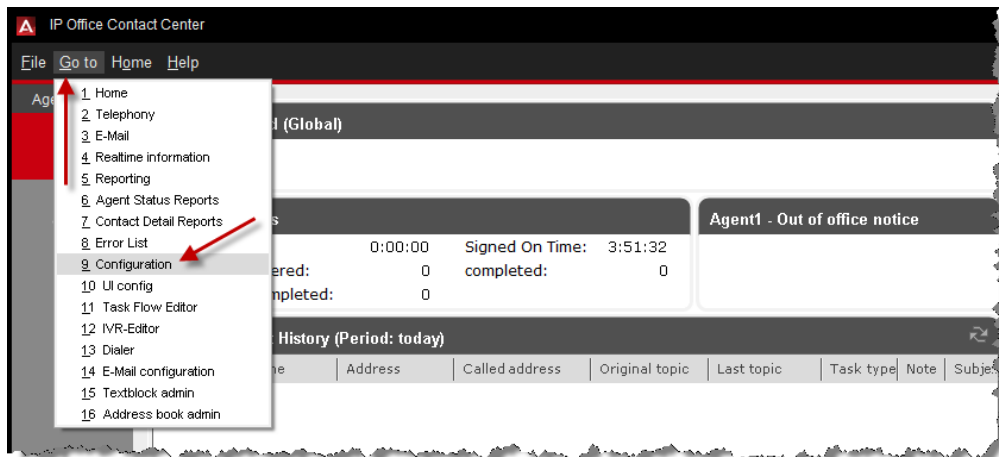
## IP Office Contact Center User Interface Administration

There are many administrative features that can be used to configure IP Office Contact Center's User Interface. Some of the more common features will be examined in this section.

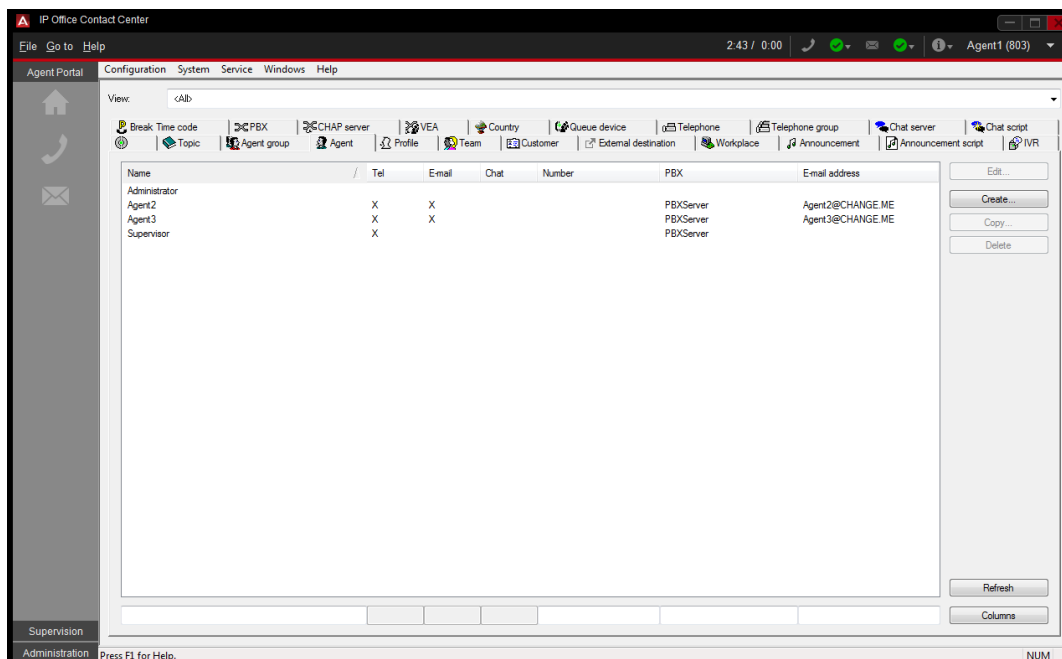
### Agent/Supervisor Passwords

IP Office Contact Center users do have a password by default (See IP Office IP Office Contact Center Installation Task Based Guide). The Administrator can change the default password of an Agent or Supervisor.

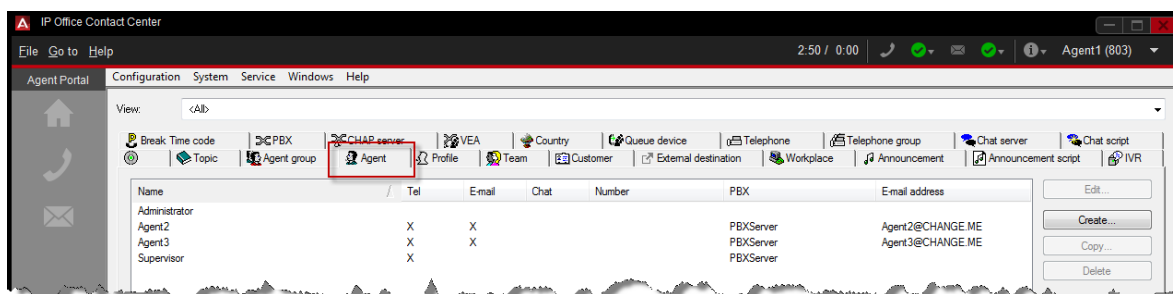
1. Login to the IP Office Contact Center User Interface. (Please refer to the **Logging into the User Interface** section of this guide).
2. Sign into the User Interface as an Administrator. (The default User name and Password is **Administrator**).
3. From the User Interface Menu bar, select **Go to** followed by **Configuration**.



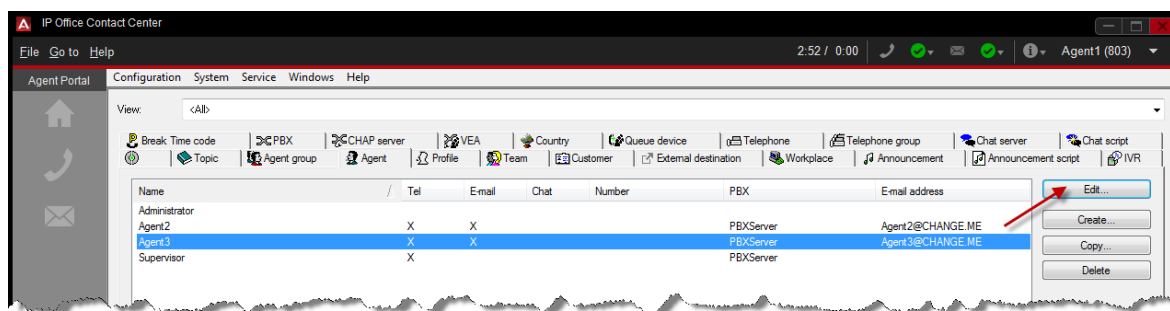
4. The **Configuration Interface** is displayed.



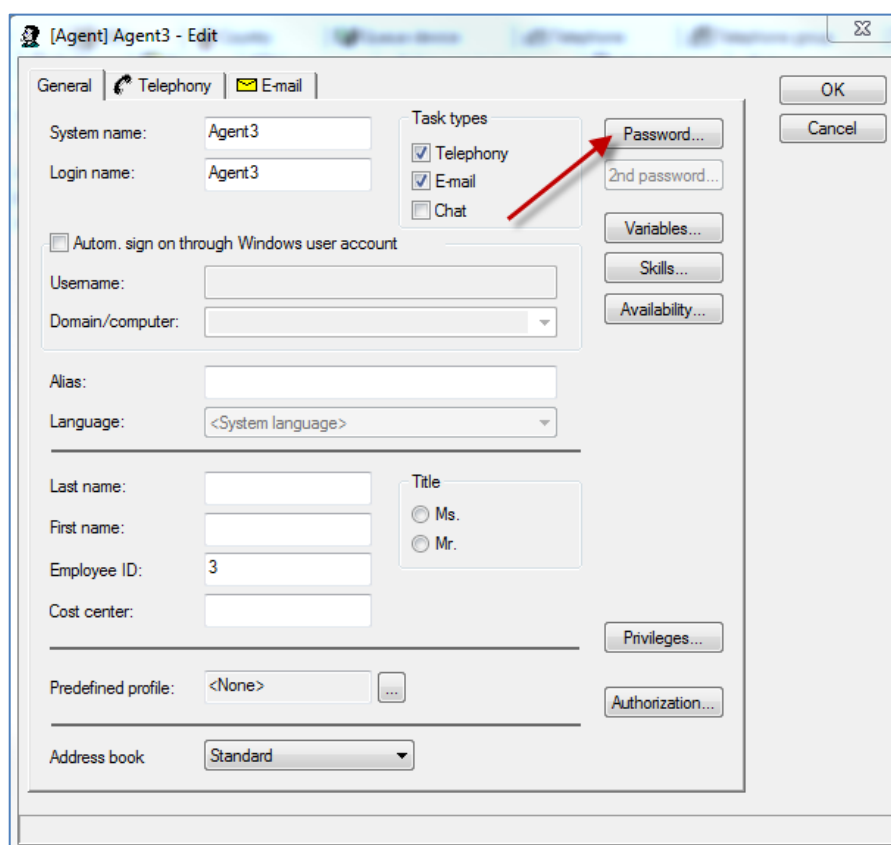
5. Click the **Agent** tab.



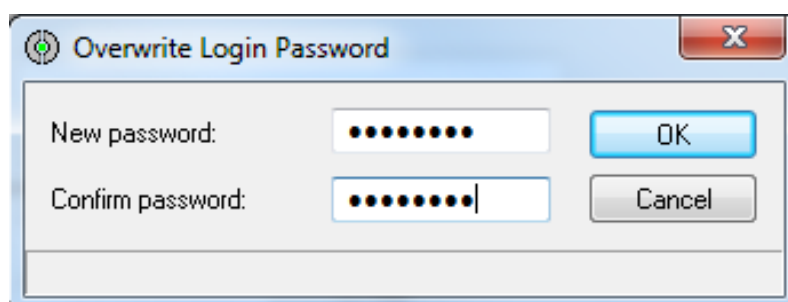
6. Select the Agent to which a password will be assigned, then click the **Edit** button.



7. The Edit Agent dialogue box is displayed. Click the **Password** button.



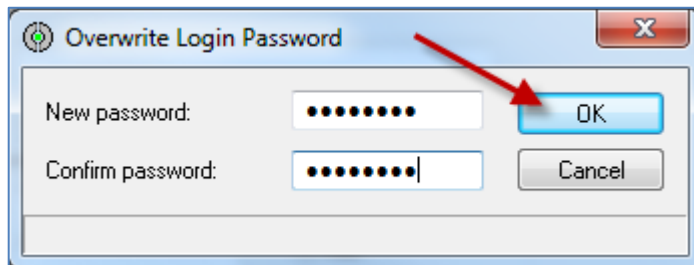
8. In the **New password** field enter a password for this user. Then repeat the process by adding the same password to the **Confirm password** field.



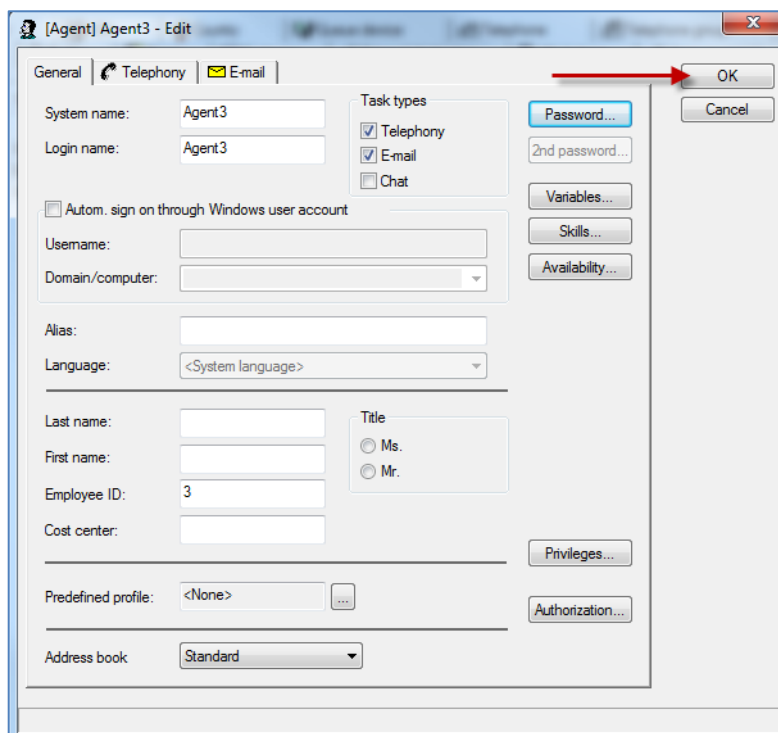


**Note:** The password must have a minimum of 8 characters. The password can comprise of lower case letters, upper case letters, digits and special characters. The password must contain characters from at least two of these groups.

9. Click the **OK** button.



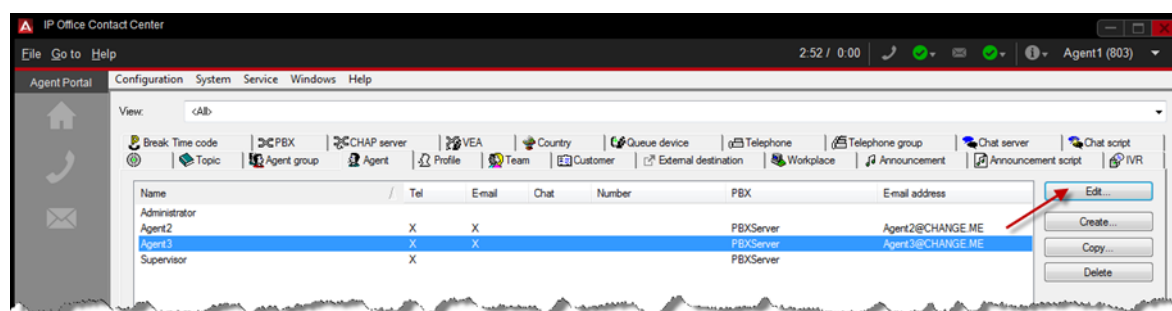
10. Then click the **OK** button on the Edit Agent dialogue box.



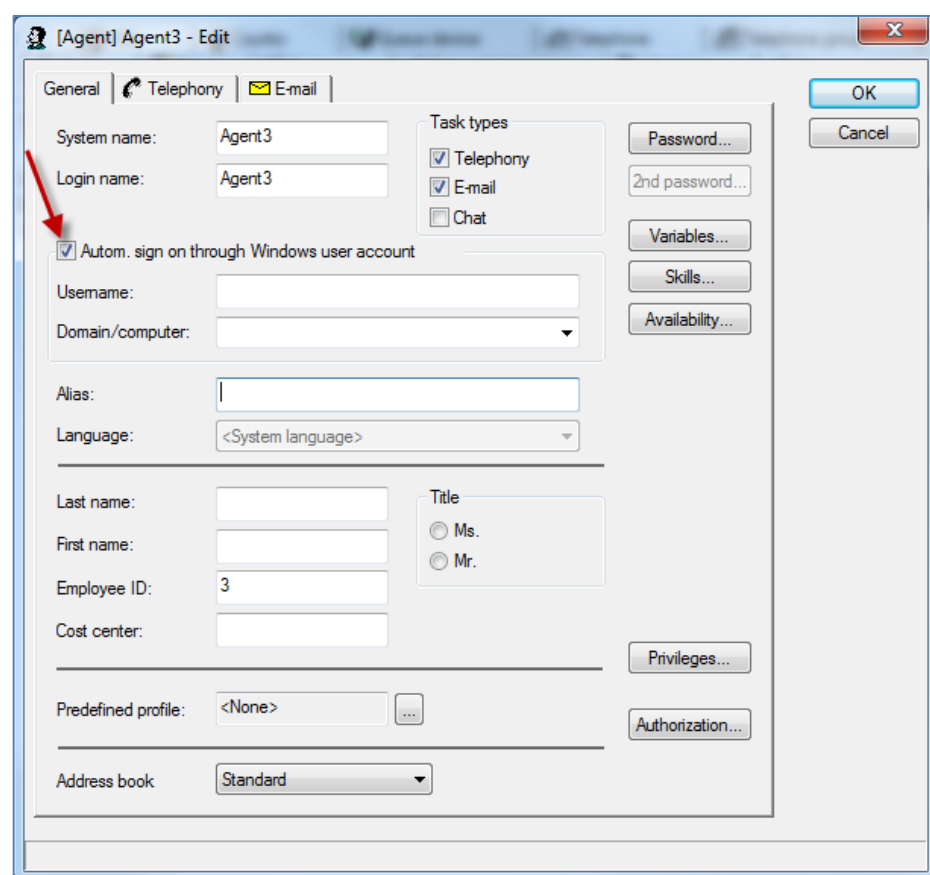
## Auto 'Sign on' using an Agents Windows User Account

IP Office Contact Center Agents can automatically sign on to the IP Office Contact Center User Interface by using their Windows user account details. This avoids the agent having to manually sign into the User Interface each time they login to the PC.

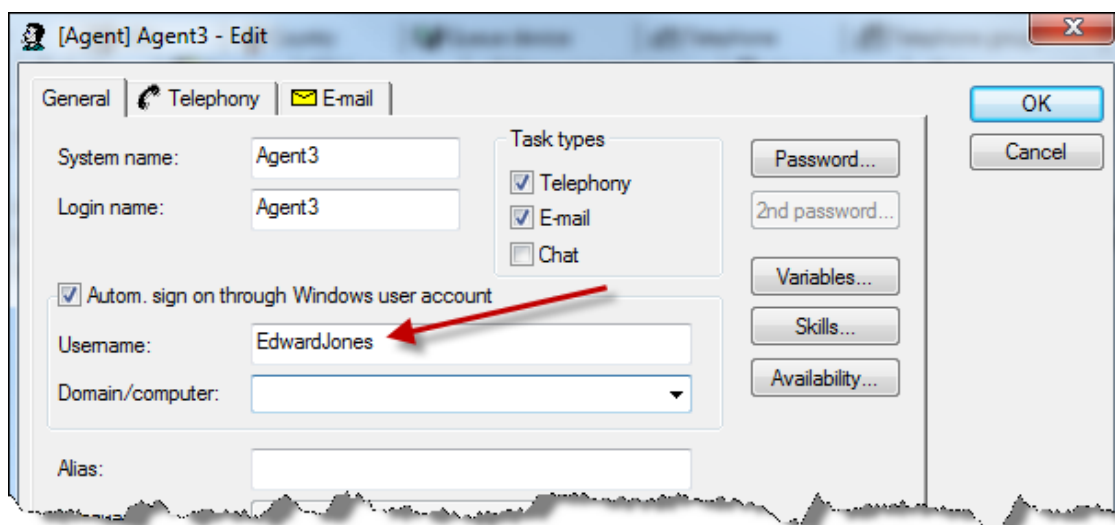
1. From the **Agents** tab, select the Agent to which a password will be assigned, then click the **Edit** button.



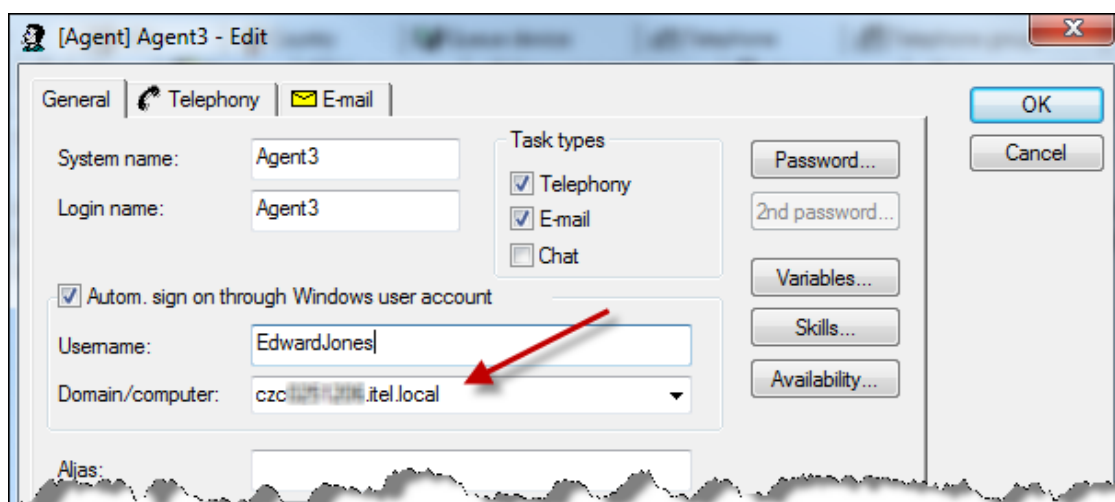
2. Click the **Auto sign on through Windows user account** check box.



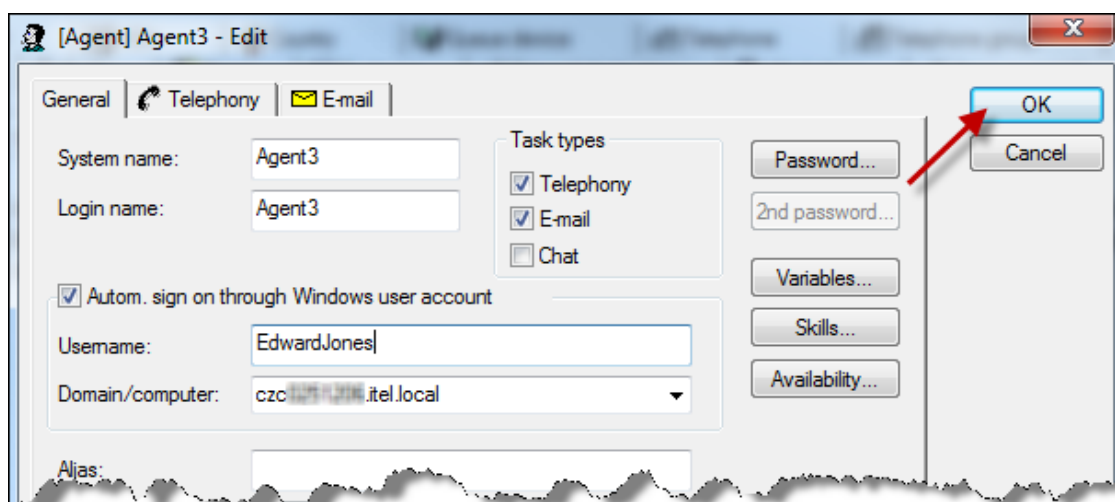
3. In the **User Name** field, enter the agents Windows User Name.



4. In the **Domain/Computer** field, enter the computer's name.



5. Click the **OK** button.



## Ring timeout

If the agent misses a call, they are signed off from the IP Office Contact Center after 15 seconds by default.

If you do not want the agents to sign off when they miss a call, set the Group's **Ring Timeout** setting to 0. Please note that with a Ring Timeout of 0, calls will be presented to the first available agent's interface until the call is answered or dropped. They will not be distributed to other agents within the group.

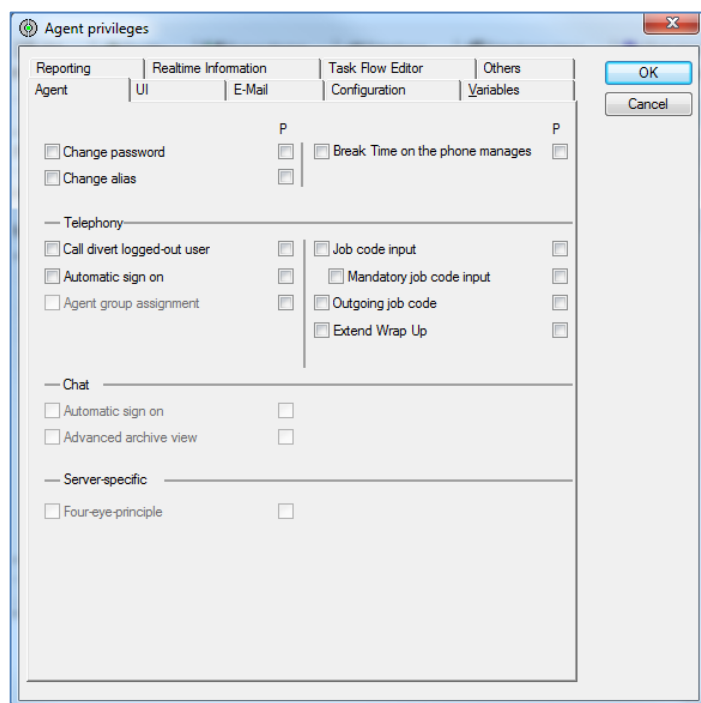
If an agent has a mailbox associated with their IP Office User account, the Groups IP Office Contact Center Ring Timeout setting must be less than the agent's IP Office Voicemail No Answer Time setting, otherwise IP Office Contact Center unanswered calls may be directed to the agent's mailbox rather than for example, to a mailbox associated with the agent Group.

## Additional Agent Settings – Edit Agent Dialogue Box

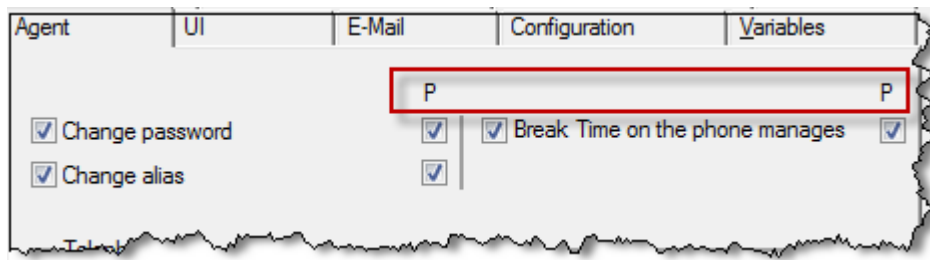
There are further settings within the **Edit Agent** dialogue box that can be assigned to agents.

## Privileges and Authorization

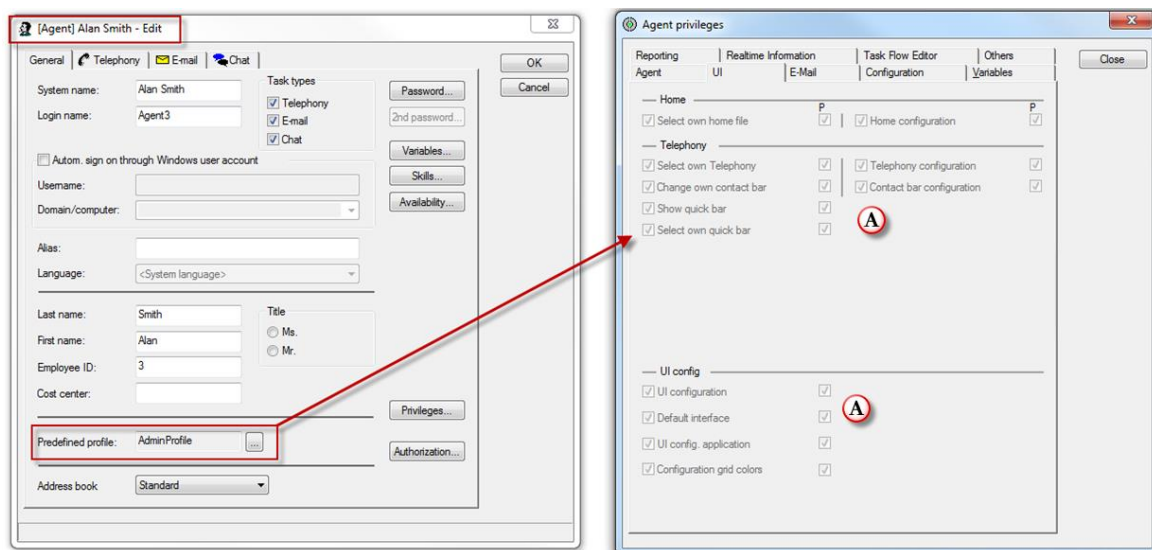
Privileges determine which modules in the IP Office Contact Center system an agent can use and which actions they can perform within the modules.



Agents may also be assigned privileges that allow them to pass on privileges to other agents; such privileges are indicated by a letter P.

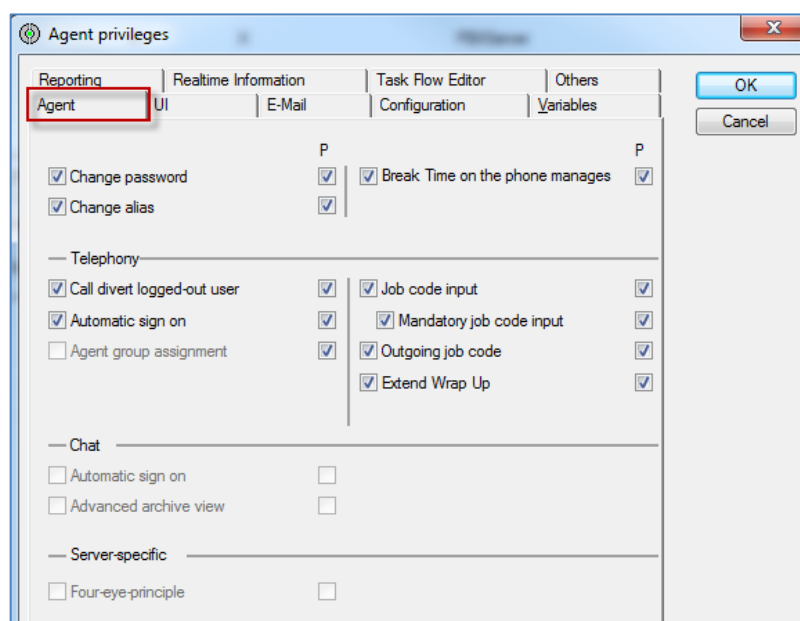


Privileges can be assigned directly to agents or assigned via a configured Profile. If an agent has privileges assigned via a configure Profile, subsequently they cannot be edited by the agent.



- A. Agent Privileges are ready(greyed out) when assigned via a predefined profile.

## Agent Privileges – Agent Tab



☒ Change password - The agent can change their passwords

☒ Change alias - The agent can change their alias. The alias can be used for anonymous reporting.

☒ Break Time on the phone manages - This allows the agent to commence break time from their Telephony View and simultaneously set break time for their Email View or Chat View, if they are also a Multi Channel agent.



## Telephony Privileges

☒ Call divert logged-out user - Not supported with IP Office Contact Center.

☒ Automatic sign on - The agent is automatically signed on for call distribution.

☒ Agent group assignment - Not supported with IP Office Contact Center.

☒ Job code input - The agent can add a job code against the call.

☒ Job code input  
☒ Mandatory job code input - Mandatory Job Code Input – The agent must enter a job code against every call they make or take. Until they enter a job code they stay in ACW (after call works) state.

Note: To select the **Mandatory Job Code Input**, the **Job Code Input** check box must also be selected.

☒ Outgoing job code - The Agent can only enter a job code against outgoing calls.

☒ Extend Wrap Up - The agent has the capability to extend their after call work period.

## Chat Privileges

☐ Automatic sign on - The agent will be automatically signed on to all Chat Agent Groups to which they have been assigned.

☐ Advanced archive view - The agent has the option to use the chat archive.

## Server Specific

— Server-specific —

☐ Four-eye-principle

- When this privilege is granted, data must be viewed by more than one person. A password is required for the second person to retrieve the data. This password is set during the agent's configuration.

**Note:** If the **Four Eye Principle** check box is selected, an agent can't login individually. They must login with the second person, i.e. the person granted the second password.

## Agent Privileges – UI Tab

Agent privileges

Reporting | Realtime Information | Task Flow Editor | Others

Agent | **UI** | E-Mail | Configuration | Variables

— Home —

Privilege	P	Privilege	P
<input checked="" type="checkbox"/> Select own home file	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Home configuration	<input checked="" type="checkbox"/>

— Telephony —

Privilege	P	Privilege	P
<input checked="" type="checkbox"/> Select own Telephony	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Telephony configuration	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Change own contact bar	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Contact bar configuration	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Show quick bar	<input checked="" type="checkbox"/>		
<input checked="" type="checkbox"/> Select own quick bar	<input type="checkbox"/>		

— UI config —

Privilege	P
<input checked="" type="checkbox"/> UI configuration	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Default interface	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> UI config. application	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/> Configuration grid colors	<input checked="" type="checkbox"/>

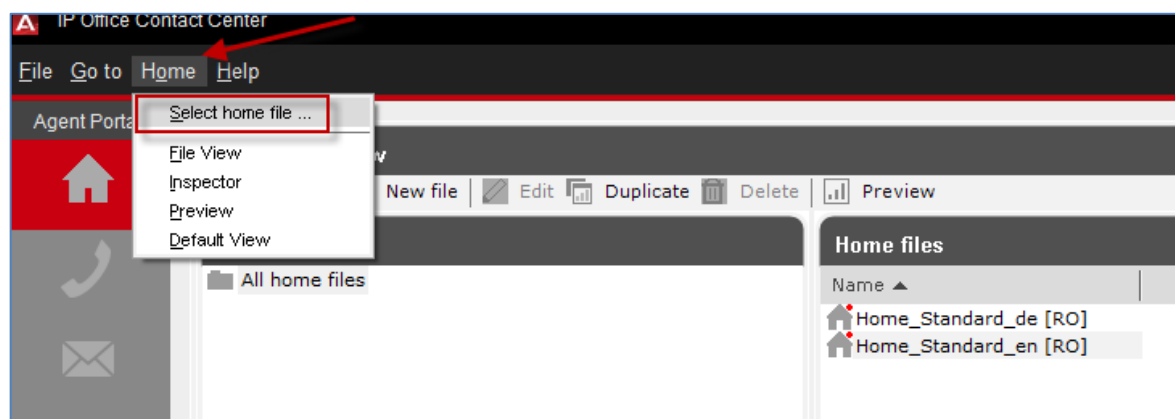
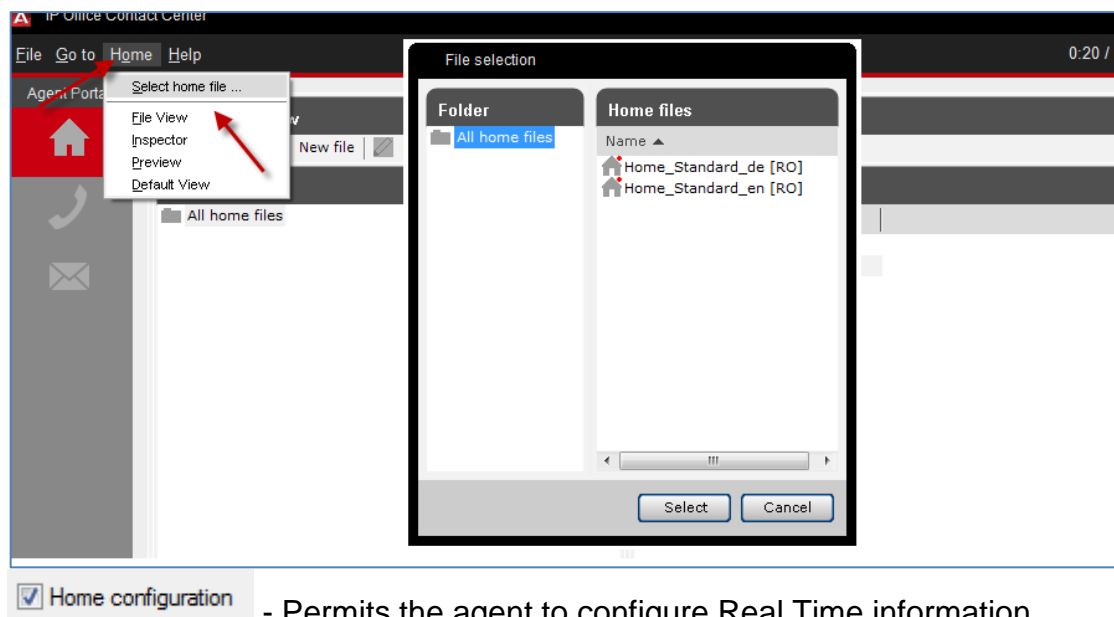
OK Cancel

## Home Privileges

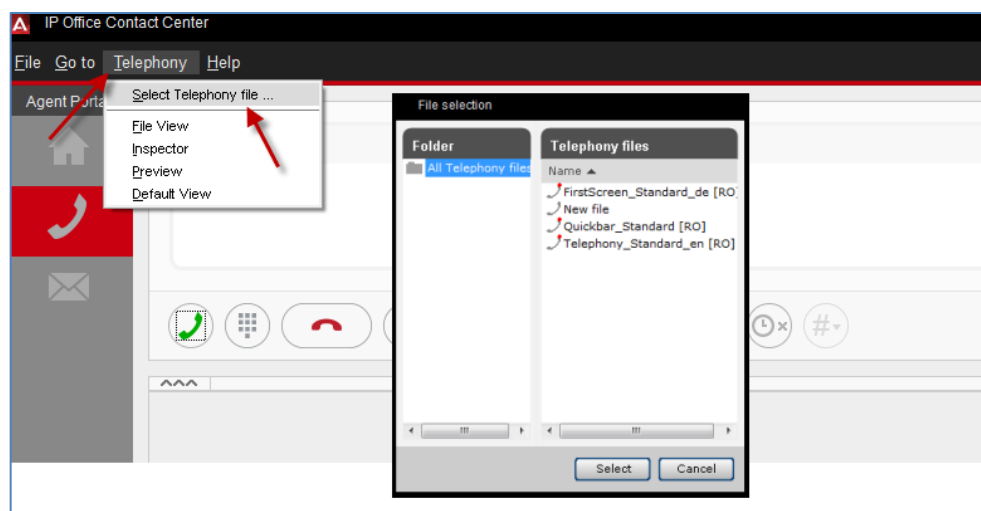
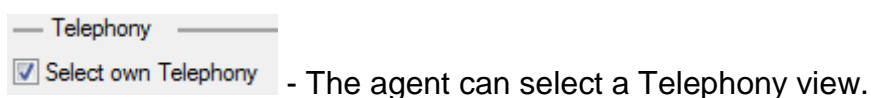
— Home —

☒ Select own home file

- Permits the agent to select which Real Time View to be visible as their home page.



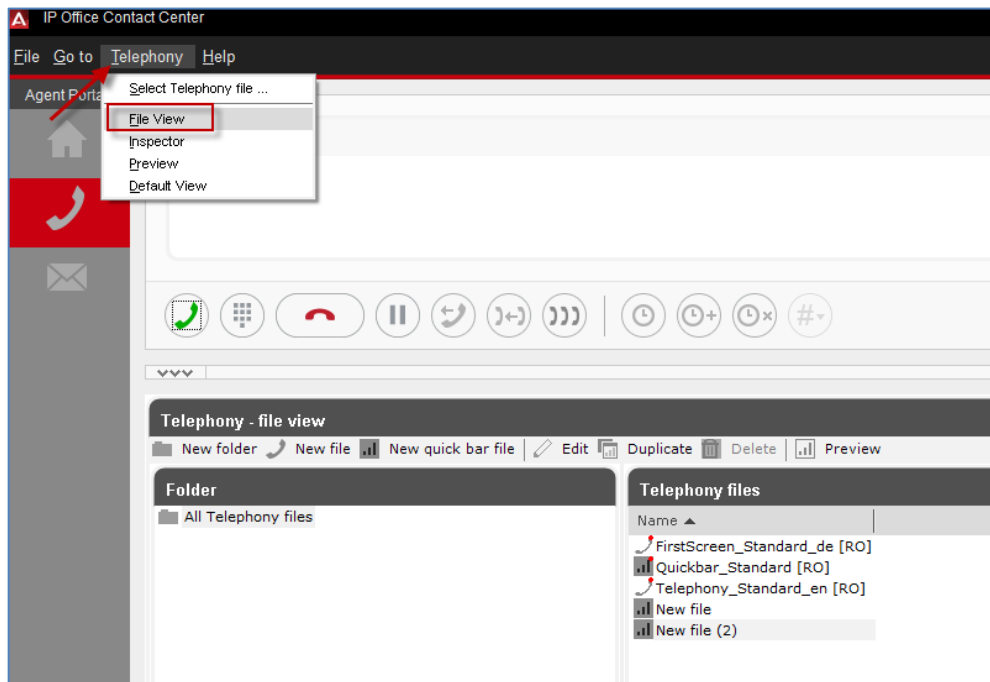
## Telephony Privileges





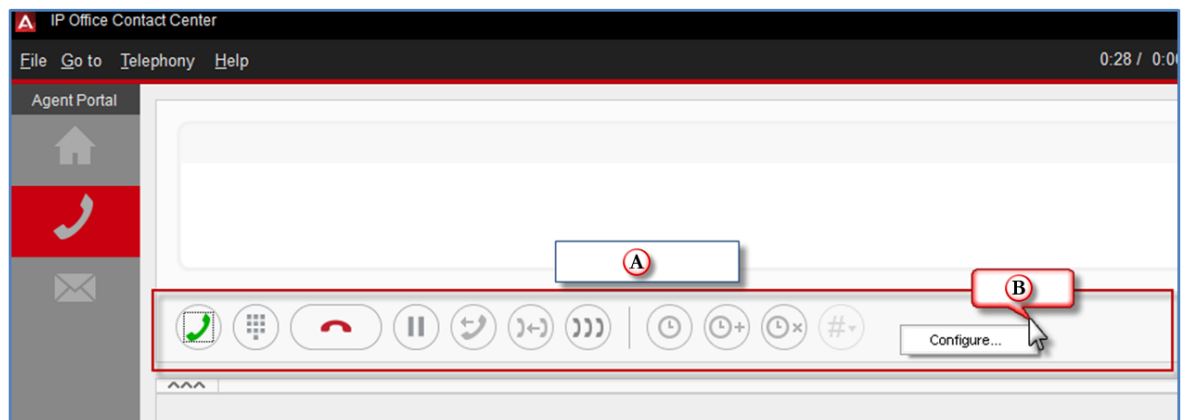
☒ Telephony configuration

- The agent can configure their Telephony view.



☒ Change own contact bar

- The agent can change their contact bar.

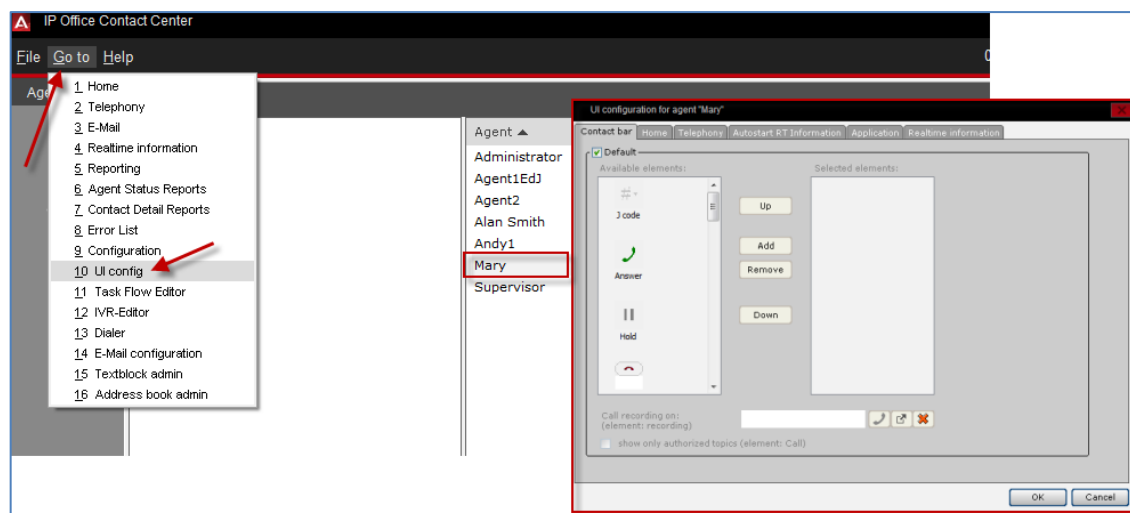


A. Contact Bar

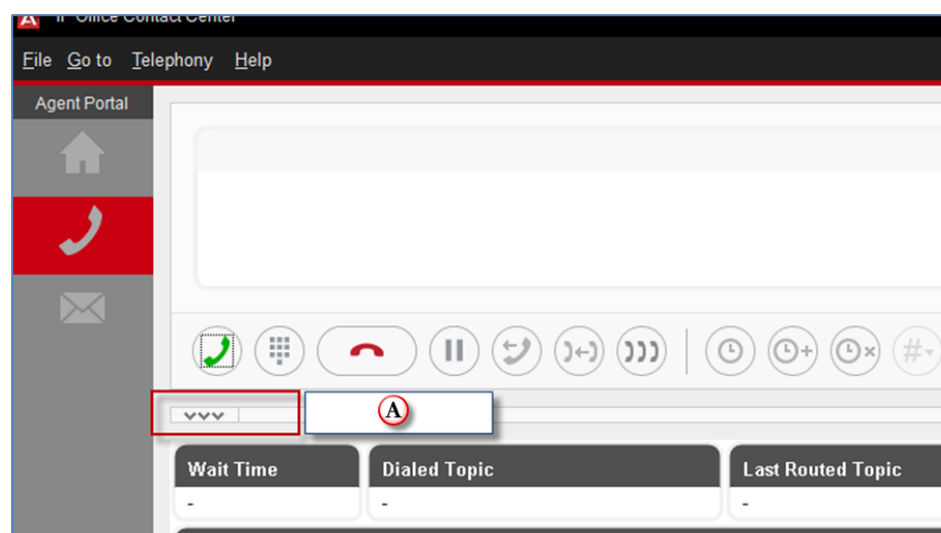
B. Right click.

☒ Contact bar configuration

- The agent can change other agent's contact bars.

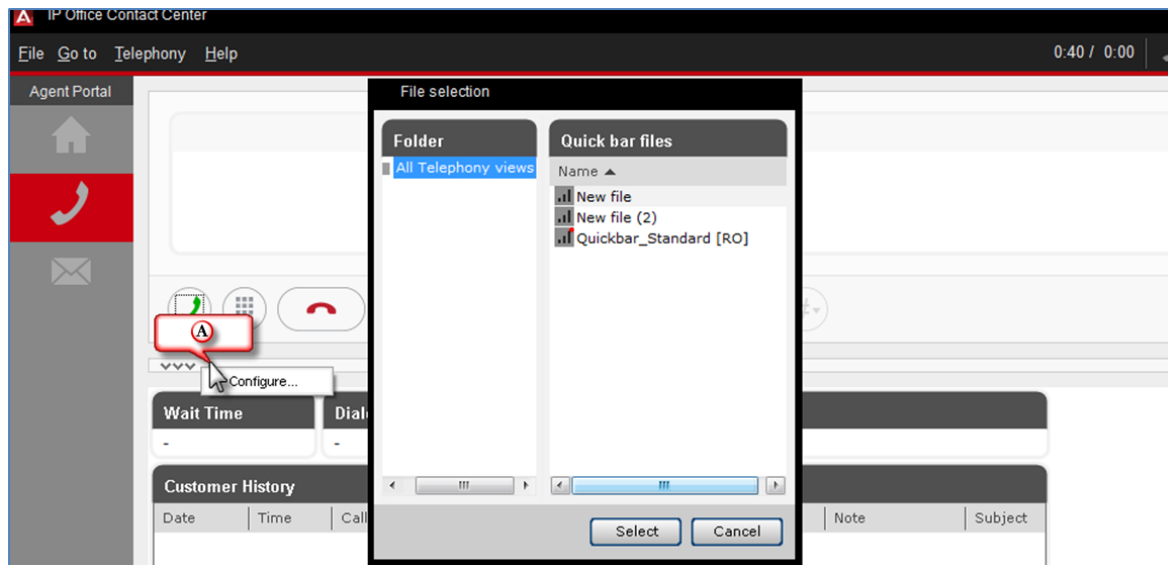


☒ Show quick bar - When selected, the Quick Bar is displayed.



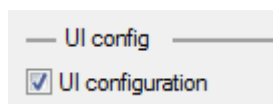
A. Quick Bar

☒ Select own quick bar - When selected, the agent can select the Quick Bar file to be displayed.

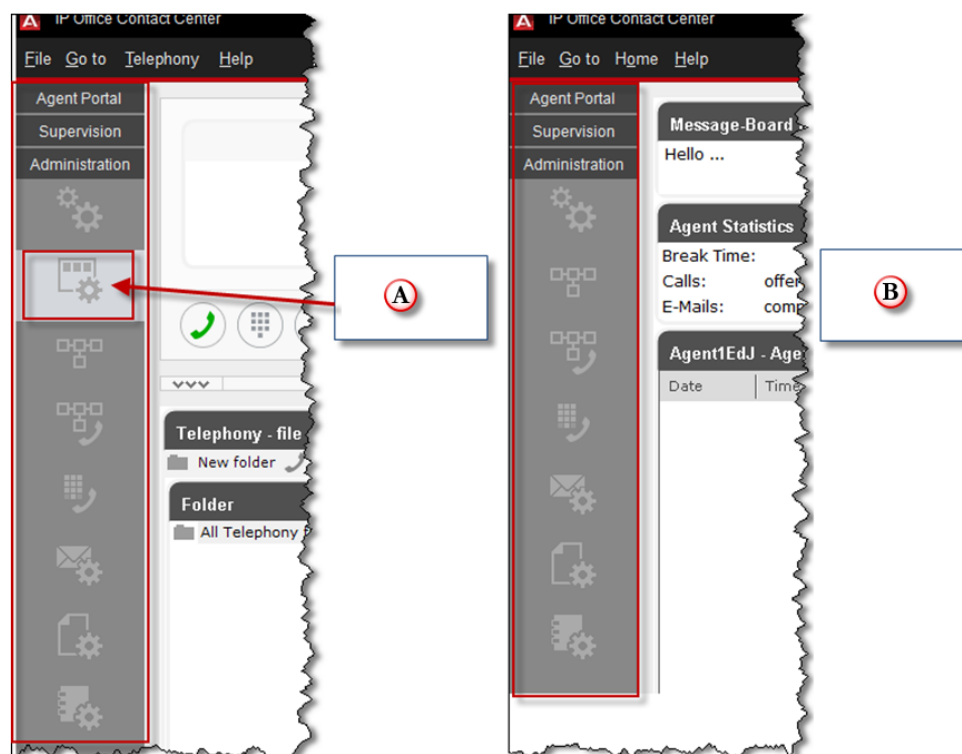


A. Right click.

## User Interface Configuration Privileges



- If selected, the agent can configure their own User Interface.  
The Configuration option will also be displayed in their User Interface Task Bar.



A. With UI Configuration Privileges

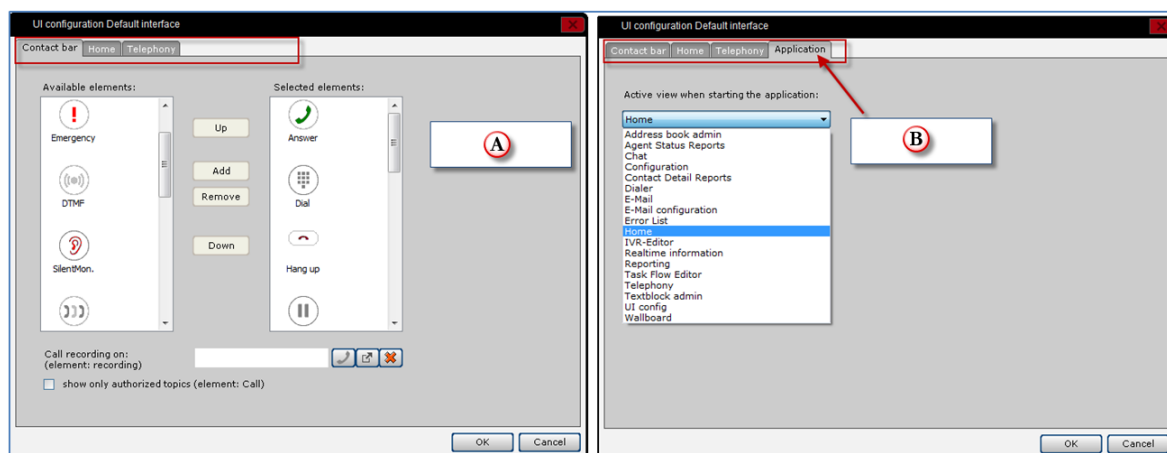
B. Without UI Configuration Privileges.

☒ Default interface

- The Agent will view the default interface.

☒ UI config. application

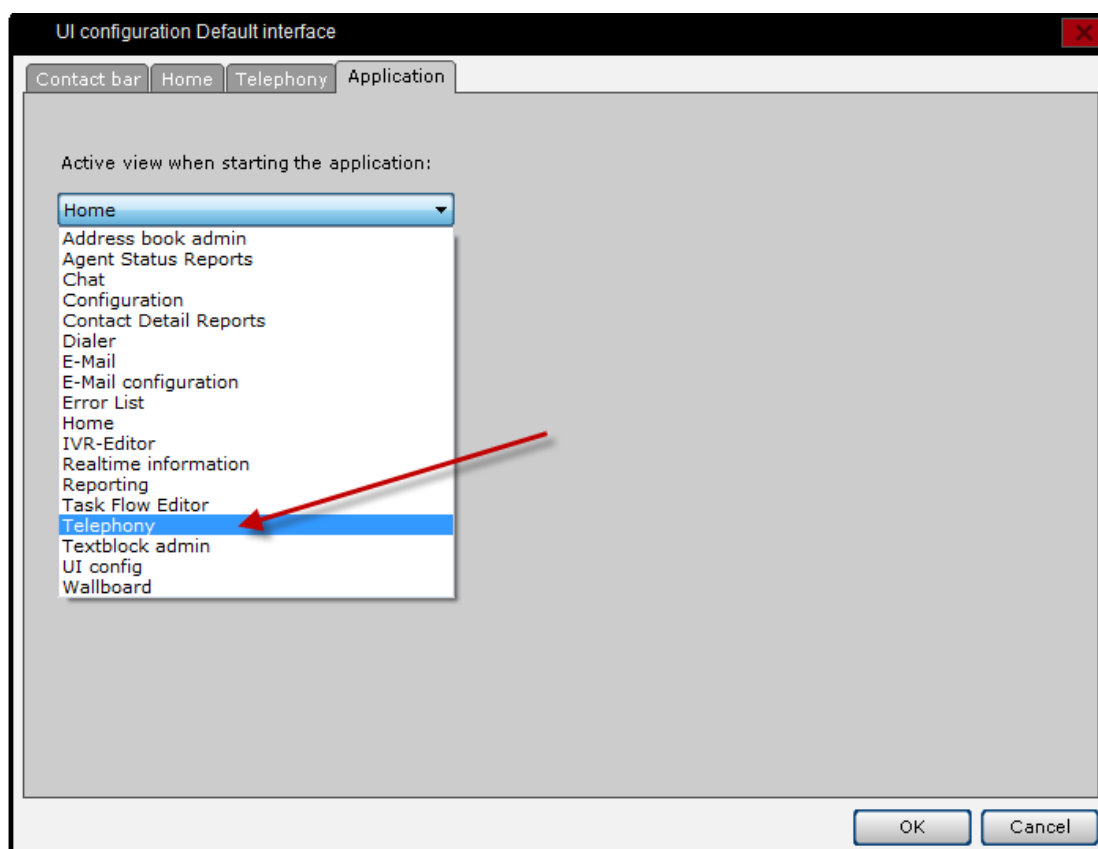
- Allows the agent to select the active view to be displayed by default.



A. Without UI config application privileges

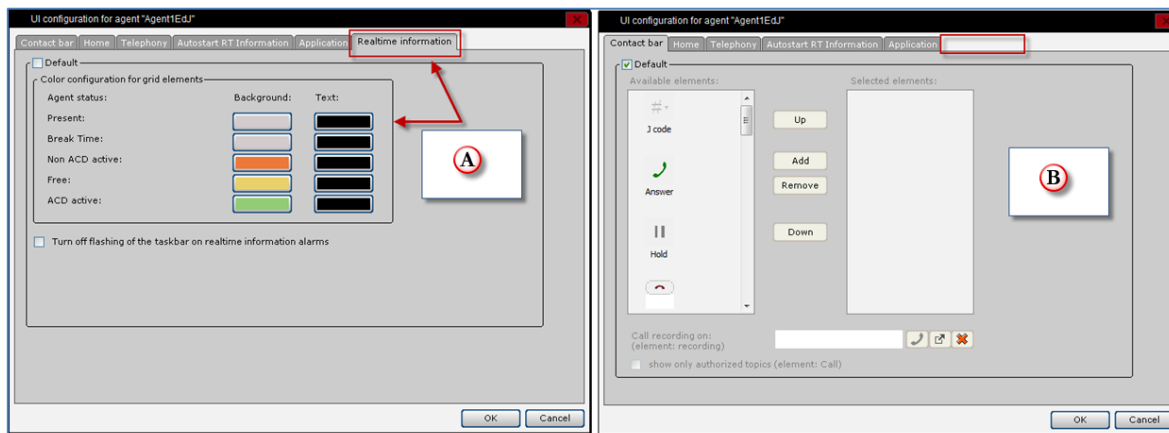
B. With UI config application privileges

For example, when an Agent signs into the User Interface, they may require the **Telephony View** to be their default view rather than the **Home View**.



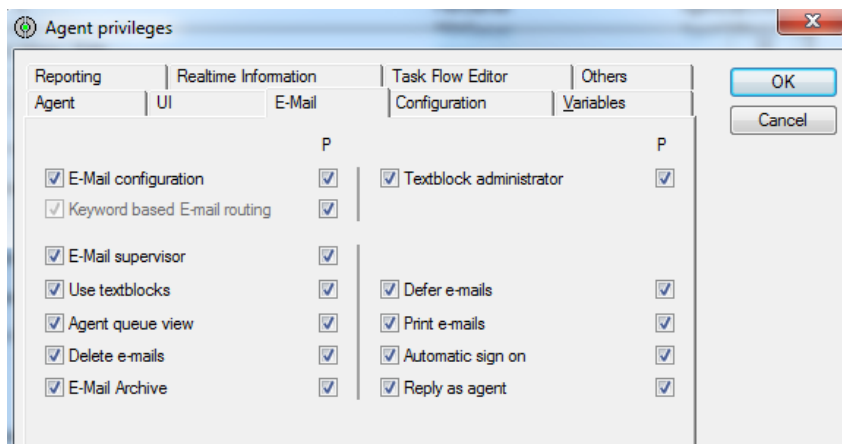
☒ Configuration grid colors

- When selected, the agent can change the background colors and text colors of their user interface.



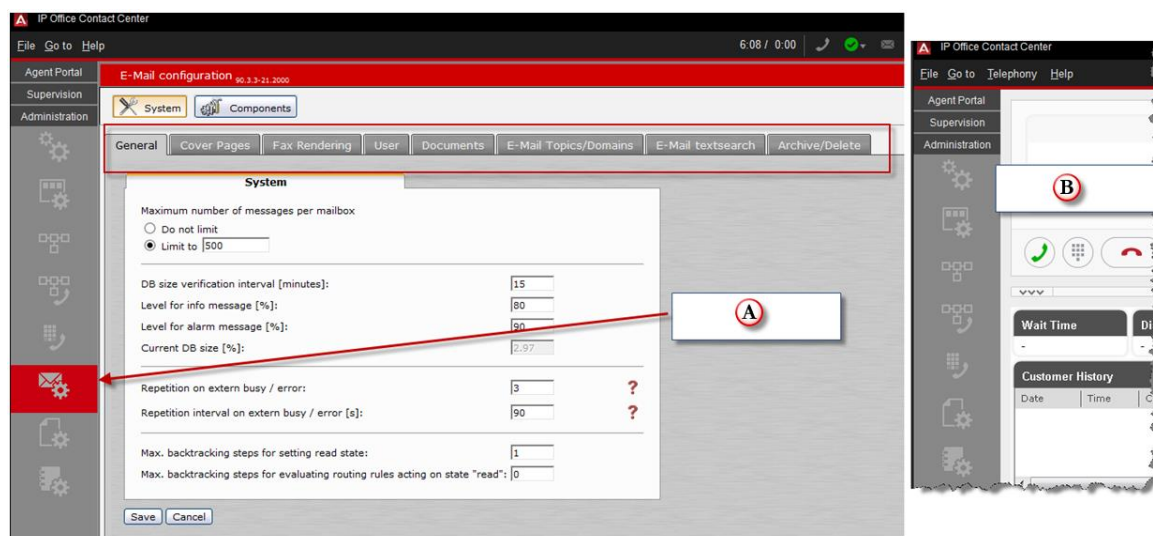
- A. With Configuration Grid Color Privileges  
Without Configuration Grid Color Privileges

## Agent Privileges – Email Tab



☒ E-Mail configuration

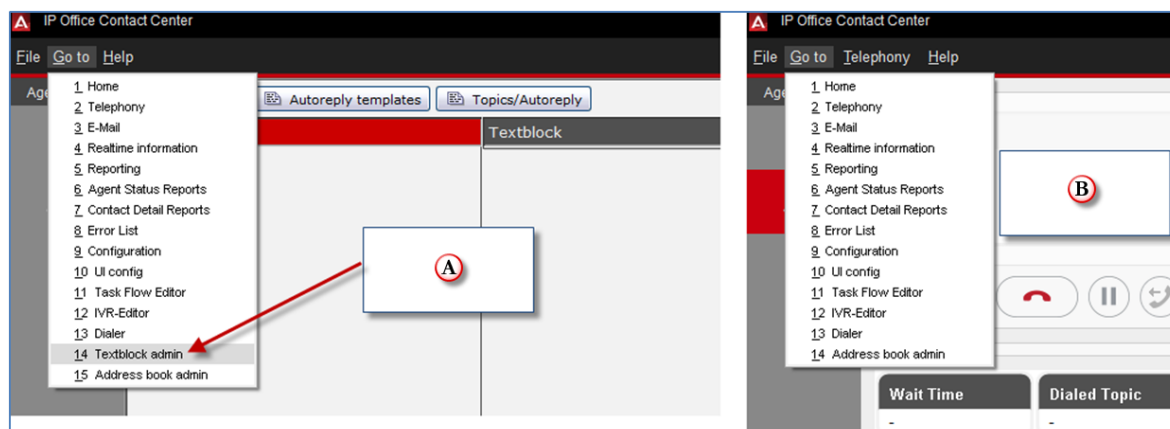
- The agent can configure email settings.



- A. With Email Configuration Privileges
- B. Without Email Configuration Privileges

☒ **Keyword based E-mail routing** - This privilege allows the agent to configure email scripts that allow emails to be searched for specific text.

☒ **Textblock administrator** - This allows the agent to create text blocks for commonly used text and phrases that can be included in email messages.



- A. With Text Block administrator privileges
- B. Without Text Block administrator privileges

☒ **E-Mail supervisor** - Assigns email supervisory privileges to the agent.

☒ **Use textblocks** - Allows the agent to use configured Text Blocks.

☒ Defer e-mails

- Allows the agents to store email messages in a “held” folder for later use.

☒ Agent queue view

- Allows the agent to view any emails in the queue, for the Topics that he/she is assigned.

☒ Print e-mails

- Allows the agent to print emails.

☒ Delete e-mails

- Allows the agent to delete any active emails. Note: Once an email has been deleted it cannot be retrieved.

☒ Automatic sign on

- Allows the agent to be automatically signed on to the agent groups to which they are assigned.

☒ E-Mail Archive

- Allows the agent to view mailboxes of deleted agents or topics contained within the Archive folder.

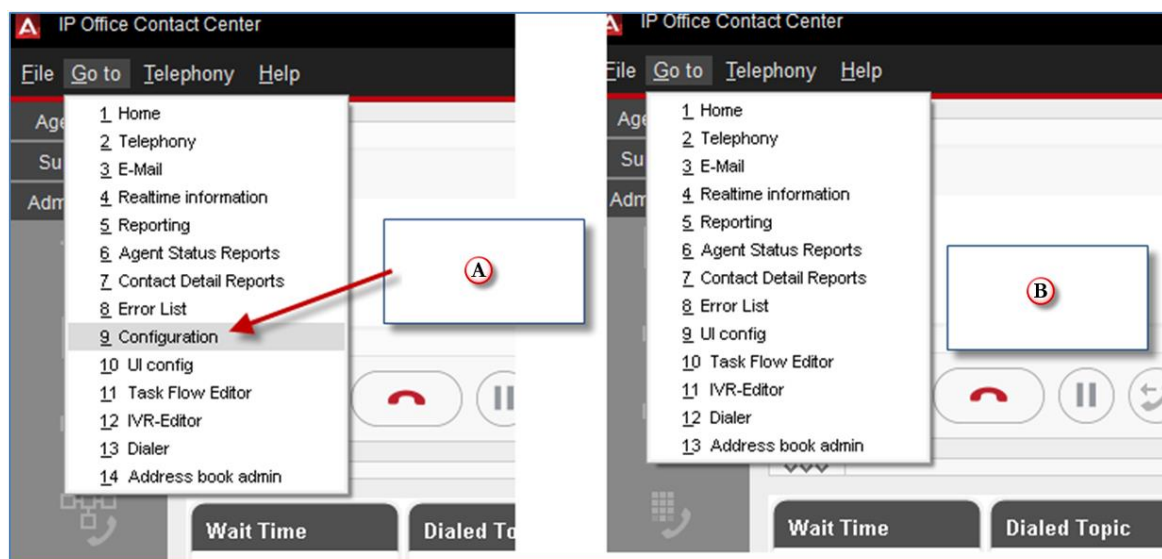
☒ Reply as agent

- Allows the agent to select whether they reply to emails as an agent or from the topic. The email address used in the message will be changed to the agent’s email address or the topics email address depending on their selection.

## Agent Privileges – Configuration Tab

Configuration	P	Configuration	P
<input checked="" type="checkbox"/> Configuration	<input type="checkbox"/>	<input checked="" type="checkbox"/> Skill	<input type="checkbox"/>
<input checked="" type="checkbox"/> Topic	<input type="checkbox"/>	<input checked="" type="checkbox"/> Announcement	<input type="checkbox"/>
<input checked="" type="checkbox"/> Blocking periods	<input type="checkbox"/>	<input checked="" type="checkbox"/> Announcement script	<input type="checkbox"/>
<input checked="" type="checkbox"/> Agent group	<input type="checkbox"/>	<input checked="" type="checkbox"/> IVR	<input type="checkbox"/>
<input checked="" type="checkbox"/> Agent	<input type="checkbox"/>	<input checked="" type="checkbox"/> Chat script	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit alias	<input type="checkbox"/>	<input checked="" type="checkbox"/> Customer recognition	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit Windows user account	<input type="checkbox"/>	<input checked="" type="checkbox"/> External destinations	<input type="checkbox"/>
<input checked="" type="checkbox"/> Edit password	<input type="checkbox"/>	<input checked="" type="checkbox"/> System	<input type="checkbox"/>
<input checked="" type="checkbox"/> Agent profile	<input type="checkbox"/>	<input checked="" type="checkbox"/> Interface for staff planning	<input type="checkbox"/>
<input checked="" type="checkbox"/> Team	<input type="checkbox"/>	<input checked="" type="checkbox"/> Configuration report	<input type="checkbox"/>
<input checked="" type="checkbox"/> Workplace	<input type="checkbox"/>	<input checked="" type="checkbox"/> Shift plan	<input type="checkbox"/>
		<input checked="" type="checkbox"/> Delete statistic data	<input type="checkbox"/>
<hr/>			
<input checked="" type="checkbox"/> Reporting filters	<input type="checkbox"/>	<input checked="" type="checkbox"/> Telephone / Telephone group	<input type="checkbox"/>
<input checked="" type="checkbox"/> Special settings	<input type="checkbox"/>	<input checked="" type="checkbox"/> CHAP server	<input type="checkbox"/>
<input checked="" type="checkbox"/> Telephone settings	<input type="checkbox"/>	<input checked="" type="checkbox"/> Access code agents	<input type="checkbox"/>
<input checked="" type="checkbox"/> Announcement modules	<input type="checkbox"/>	<input checked="" type="checkbox"/> Access code topics	<input type="checkbox"/>
<input checked="" type="checkbox"/> PBX	<input type="checkbox"/>	<input checked="" type="checkbox"/> E-Mail settings	<input type="checkbox"/>
<input checked="" type="checkbox"/> Country	<input type="checkbox"/>	<input checked="" type="checkbox"/> Chat server	<input type="checkbox"/>
<input checked="" type="checkbox"/> Queue device	<input type="checkbox"/>	<input checked="" type="checkbox"/> Chat settings	<input type="checkbox"/>

- ☒ Configuration - The agent can use the **Configuration** Module.



- A. With Configuration privileges.
- B. Without Configuration privileges.

- ☒ Topic - Allows the agent to configure topics.

- ☒ Topic
  - ☒ Blocking periods - Allows the agent to configure block periods.

- ☒ Agent group - Allows the agent to configure agent groups.

- ☒ Agent - Allows the agent to configure settings for other agents.

- ☒ Agent
  - ☒ Edit alias - The agents can configure their alias.

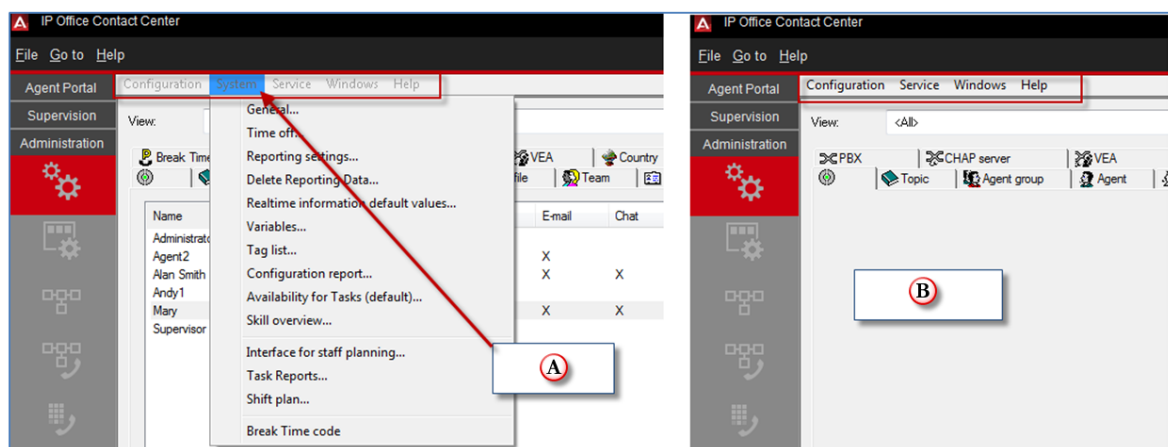
- ☒ Agent
  - ☒ Edit alias
  - ☒ Edit Windows user account - The agent can edit the settings in the IP Office Contact Center User Interface relating to their Windows user account.

- ☒ Agent
  - ☒ Edit alias
  - ☒ Edit Windows user account
  - ☒ Edit password - The agent can change their IP Office Contact Center User Interface password.

- ☒ Agent profile - The agent can configure Agent Profiles.

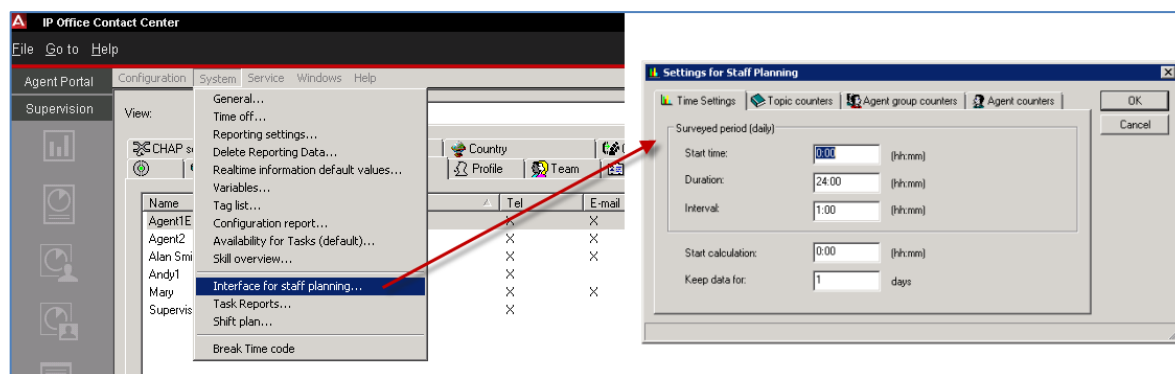


- ☒ **Team** - The agent can configure IP Office Contact Center teams.
- ☒ **Workplace** - The agent can configure IP Office Contact Center workplaces.
- ☒ **Skill** - The agent can configure IP Office Contact Center skills.
- ☒ **Announcement** - The agent can configure and assign recorded announcements.
- ☒ **Announcement script** - The agent can configure and assign announcement scripts.
- ☒ **IVR** - The agent can configure IVR scripts.
- ☒ **Chat script** - The agent can configure chat scripts.
- ☒ **Customer recognition** - The agent can enter and edit data that can be used for customer recognition purposes.
- ☒ **External destinations** - The agent can create and enter external destination details.
- ☒ **System** - Allows the agent to configure system wide settings.

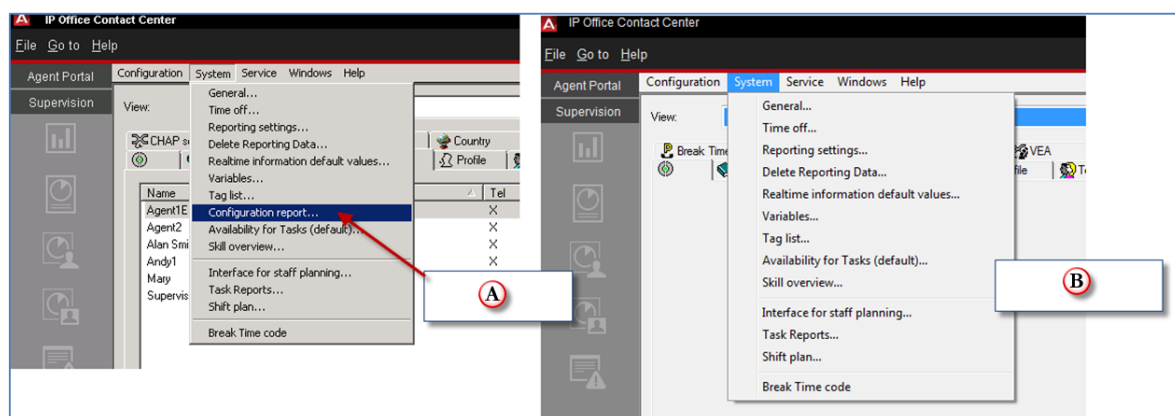


- A. With System privileges
- B. Without System privileges

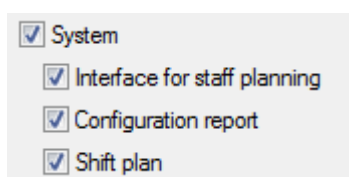
- ☒ **System**
- ☒ **Interface for staff planning** - The agent can configure the staff planning interface.



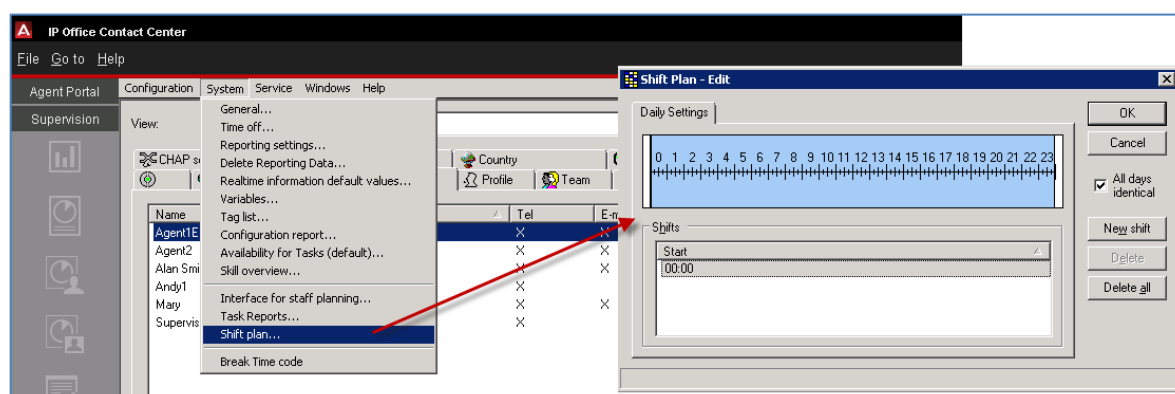
- The agent can configure the IP Office Contact Center Configuration report.

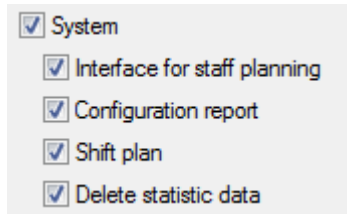


- A. With Configuration Report privileges
- B. Without Configuration Report privileges



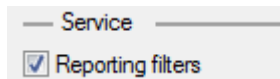
- Allows the agent to configure the Shift Plan utility.



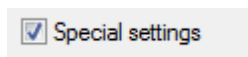
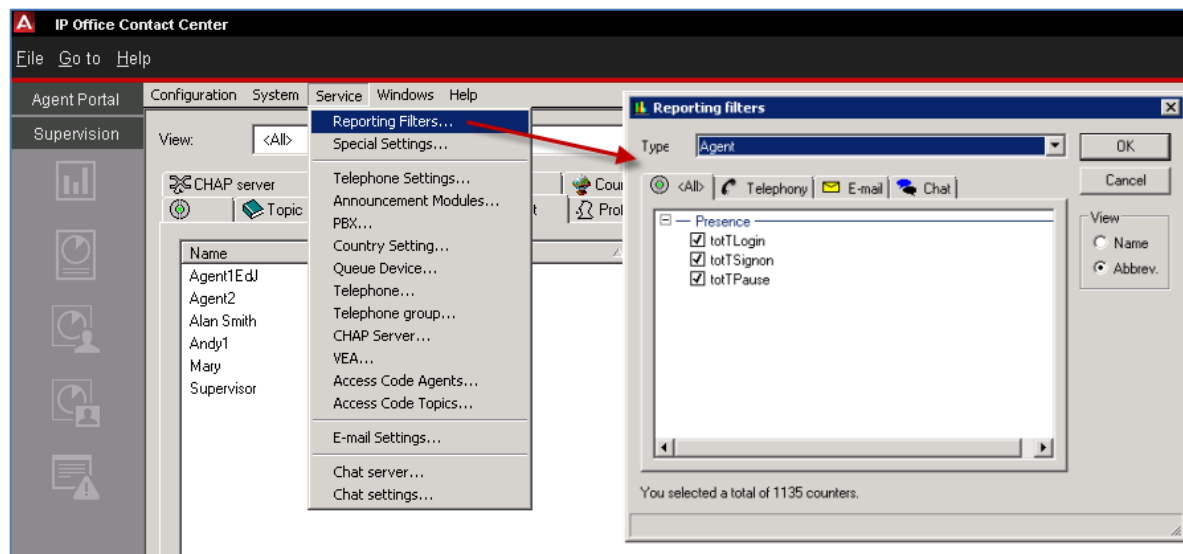


- Allows the agent to delete statistical data.

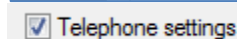
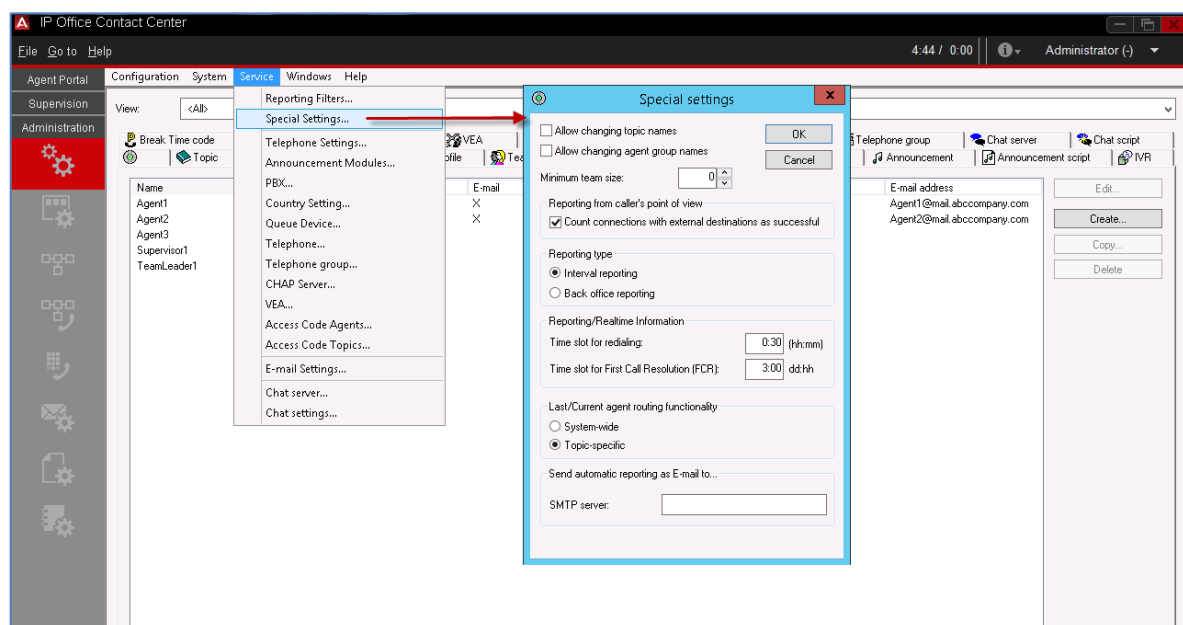
## Service Privileges



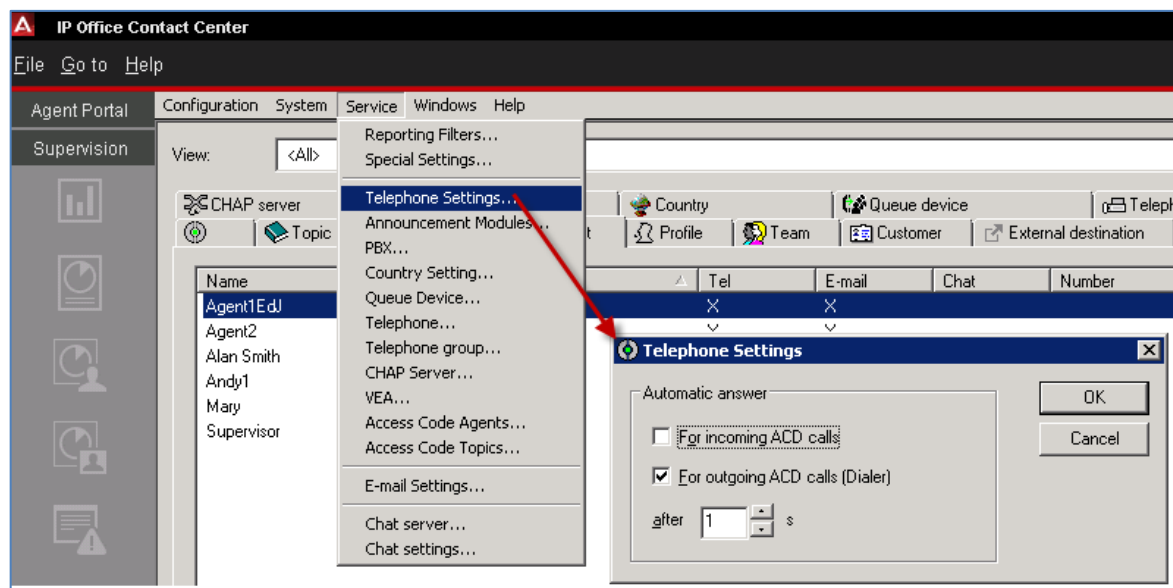
- The agent can configure Reporting Filters.



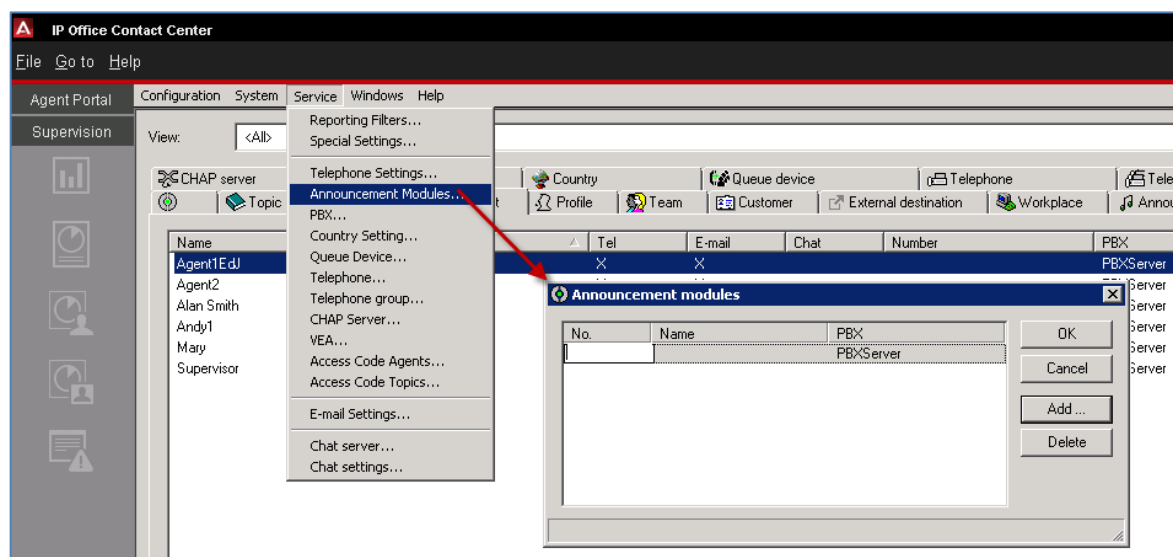
- Allows the agent to configure Special Settings.



- Allows the agent to configure the default Telephone Settings.

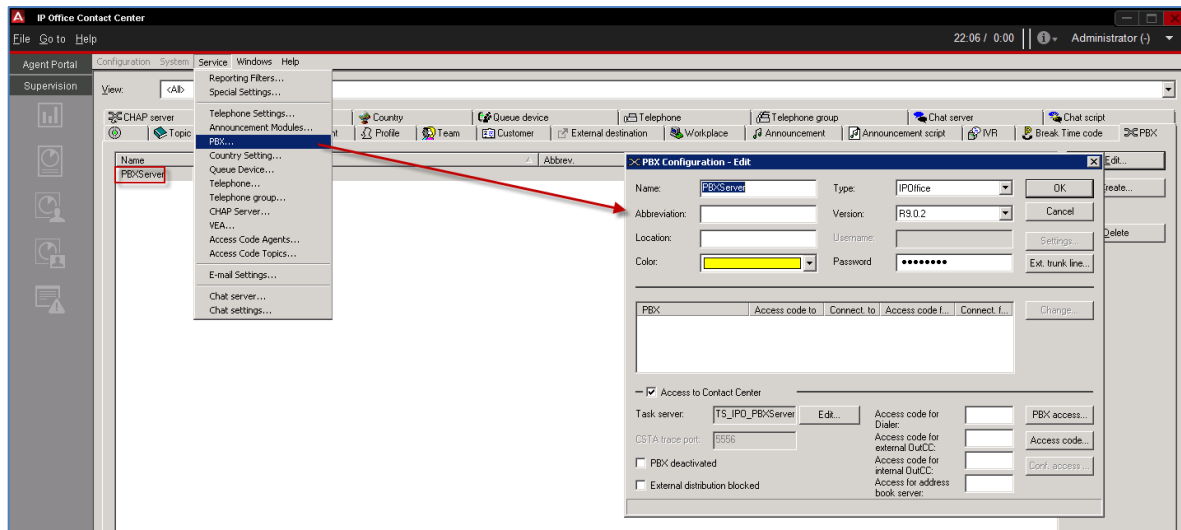


☒ **Announcement modules** - No supported with IP Office Contact Center.

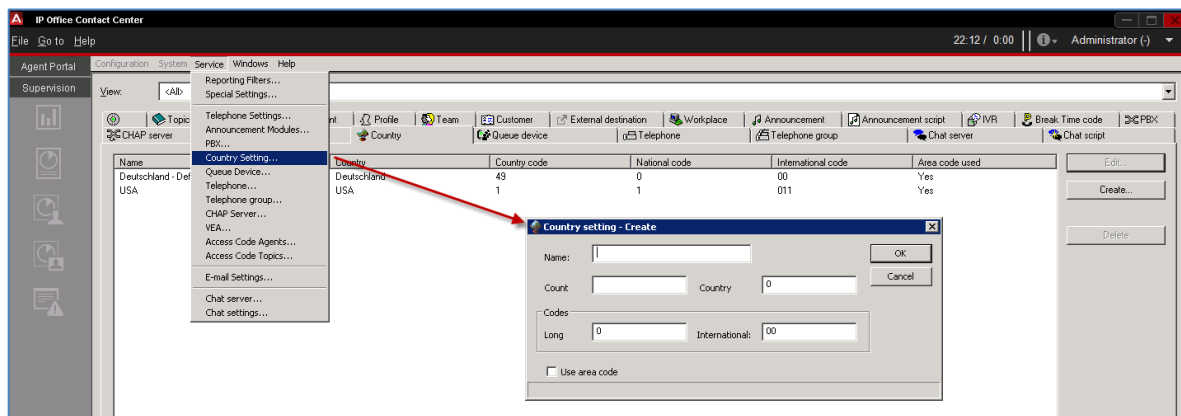


☒ **PBX** - Allows the agent to configure IP Office Contact Center PBX Settings.

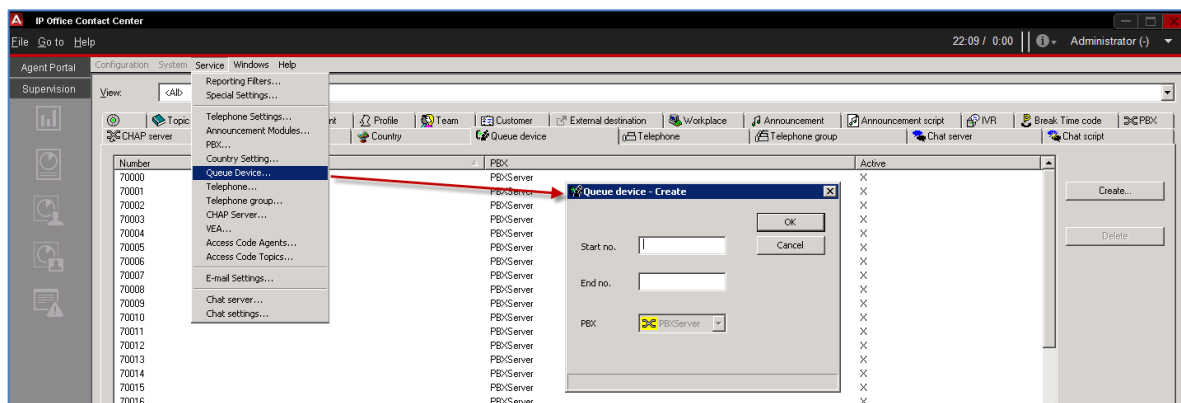
## IP Office Contact Center Telephony User Interface Configuration



☒ Country - Allows the agent to configure IP Office Contact Center Country Settings.

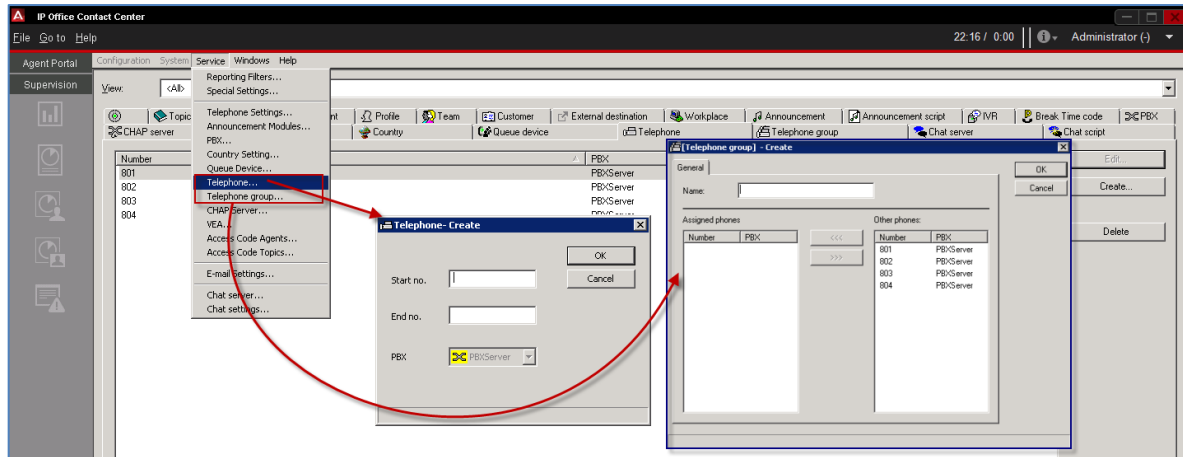


- ☒ Queue device - Allows the agent to configure Queue Devices.



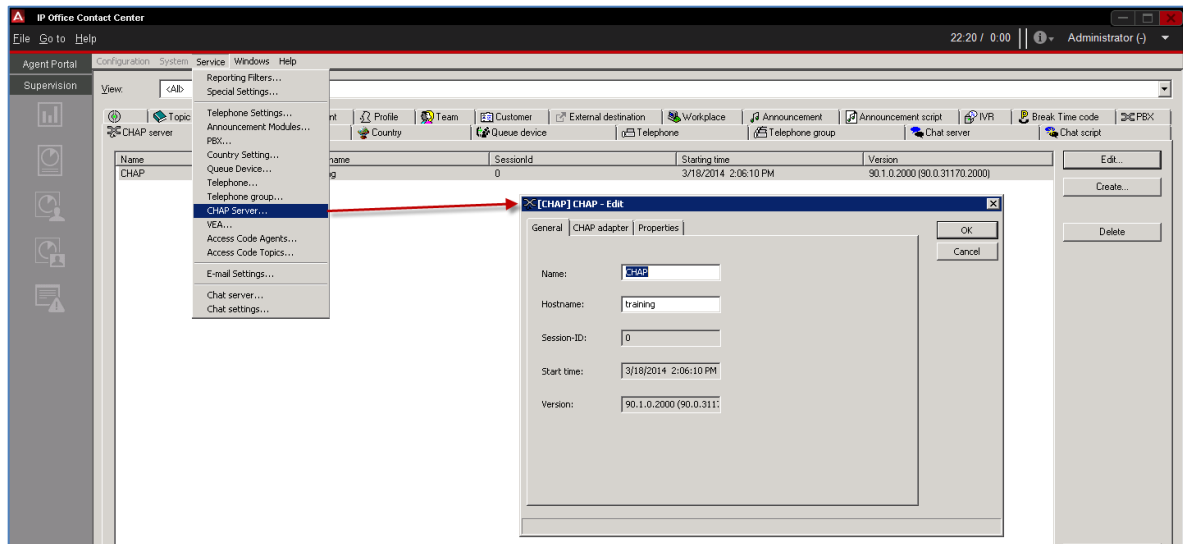
- ☒ Telephone / Telephone group - Allows the agent to configure Telephone and Telephone Group settings.

## IP Office Contact Center Telephony User Interface Configuration



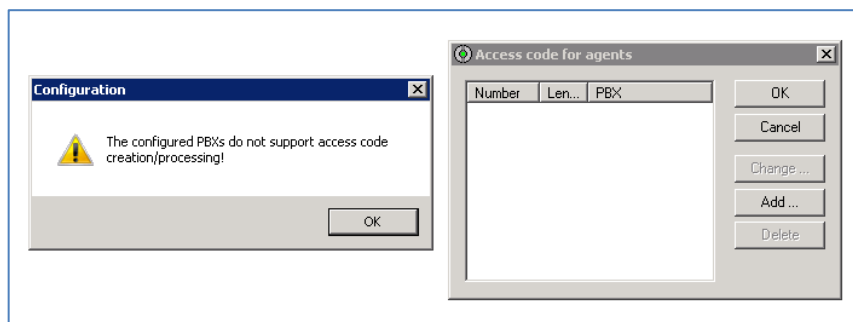
### ☒ CHAP server

- Allows the agent to configure CHAP Server settings.



### ☒ Access code agents

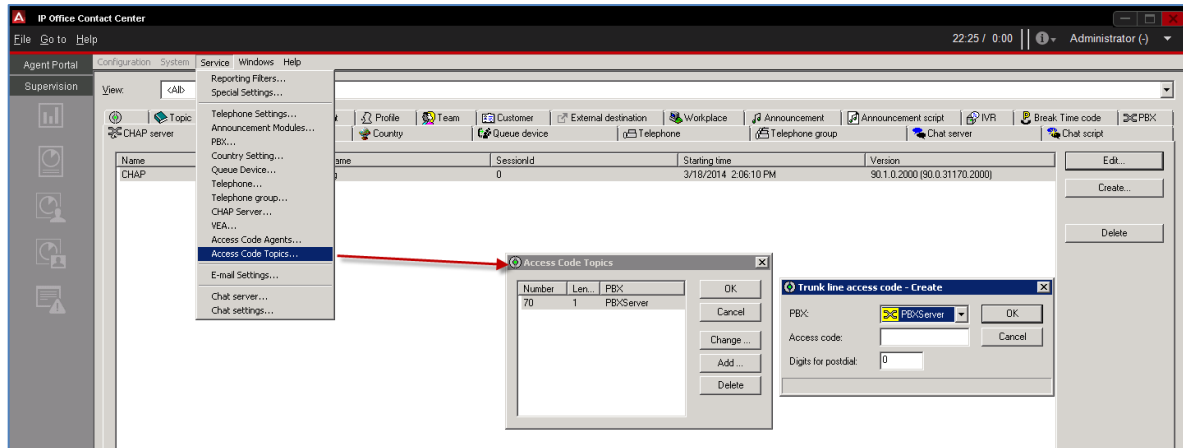
- Not applicable to IP Office configurations.



### ☒ Access code topics

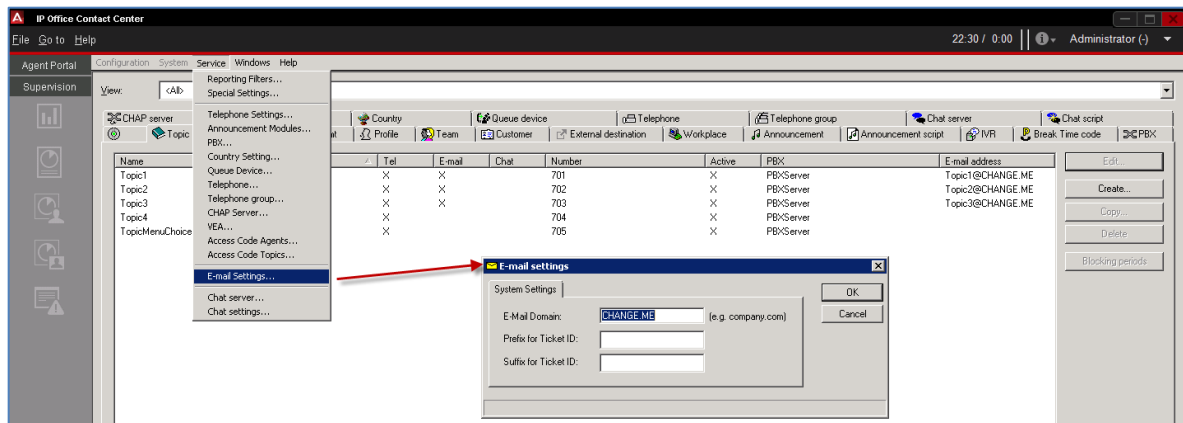
- Allows the agent to configure Access Codes for Topics.

## IP Office Contact Center Telephony User Interface Configuration



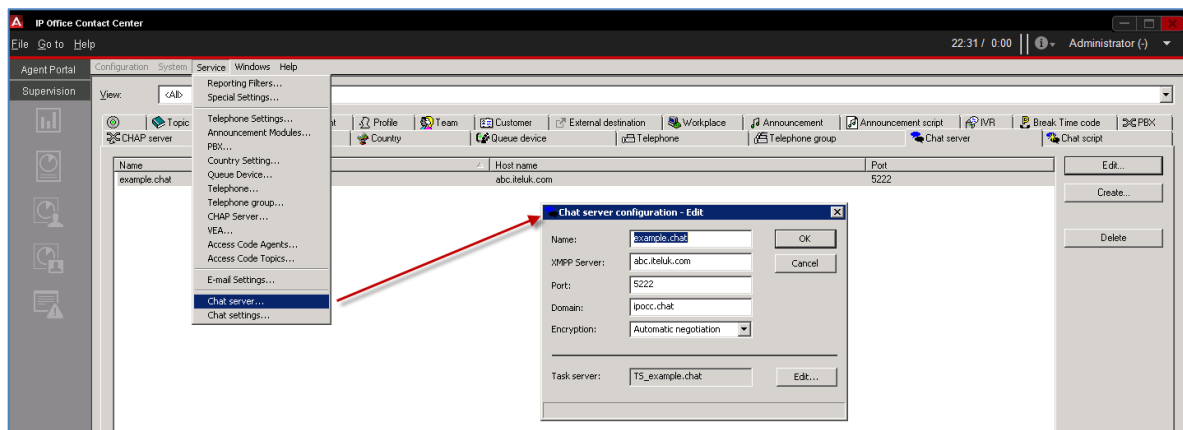
### ☒ E-Mail settings

- Allows the agent to configure Email settings.



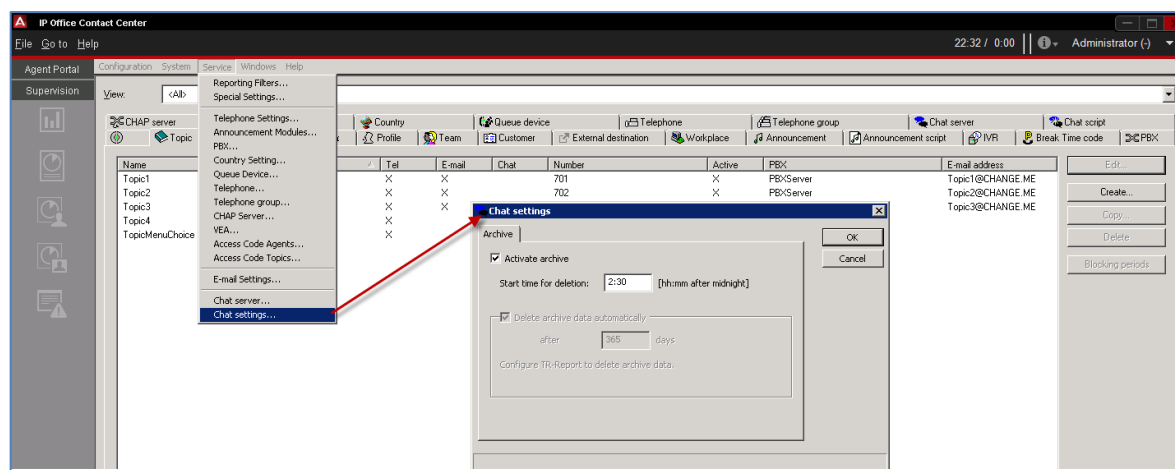
### ☒ Chat server

- Allows the agent to configure Chat Server settings.

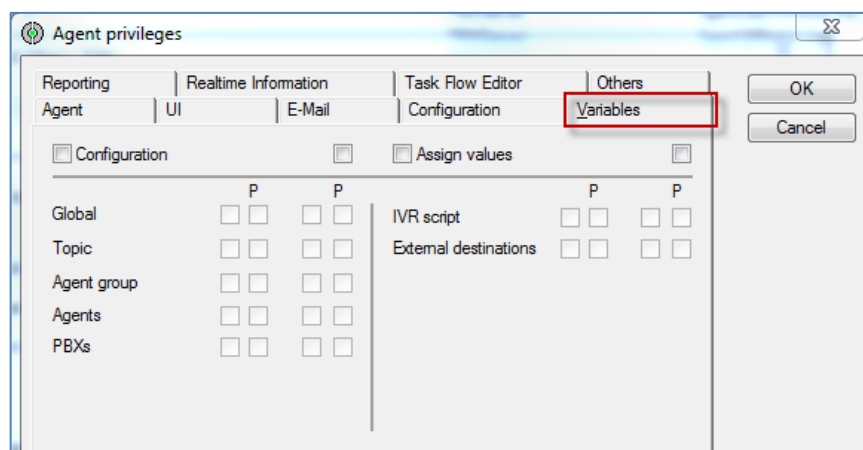


### ☒ Chat settings

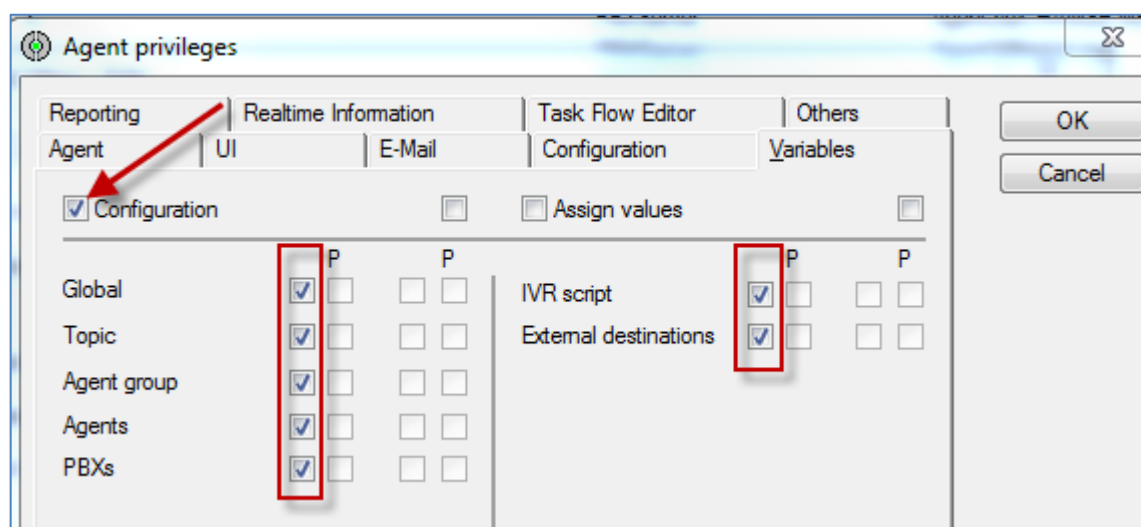
- Allows the agent to configure Chat settings.



## Agent Privileges – Variables Tab

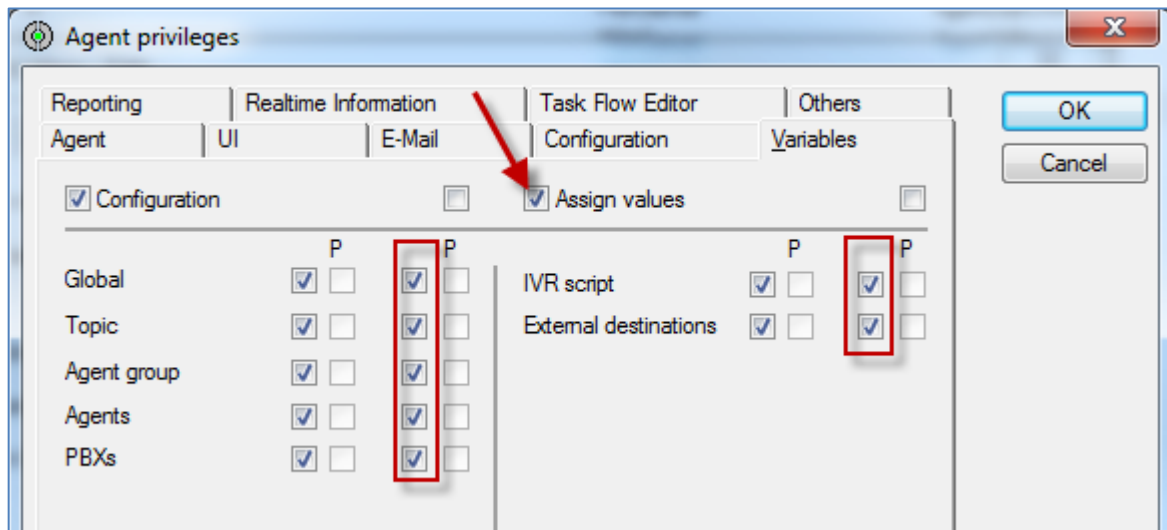


The Variables screen displays a number of privileges that determine whether the agent can configure variables relating to certain configuration parameters including Global variables, Topics, Agent Groups, Agents, PBX's, IVR Scripts and External Destinations. To give an agent Configuration privileges in relation to variables, the **Configuration** check box must be selected.

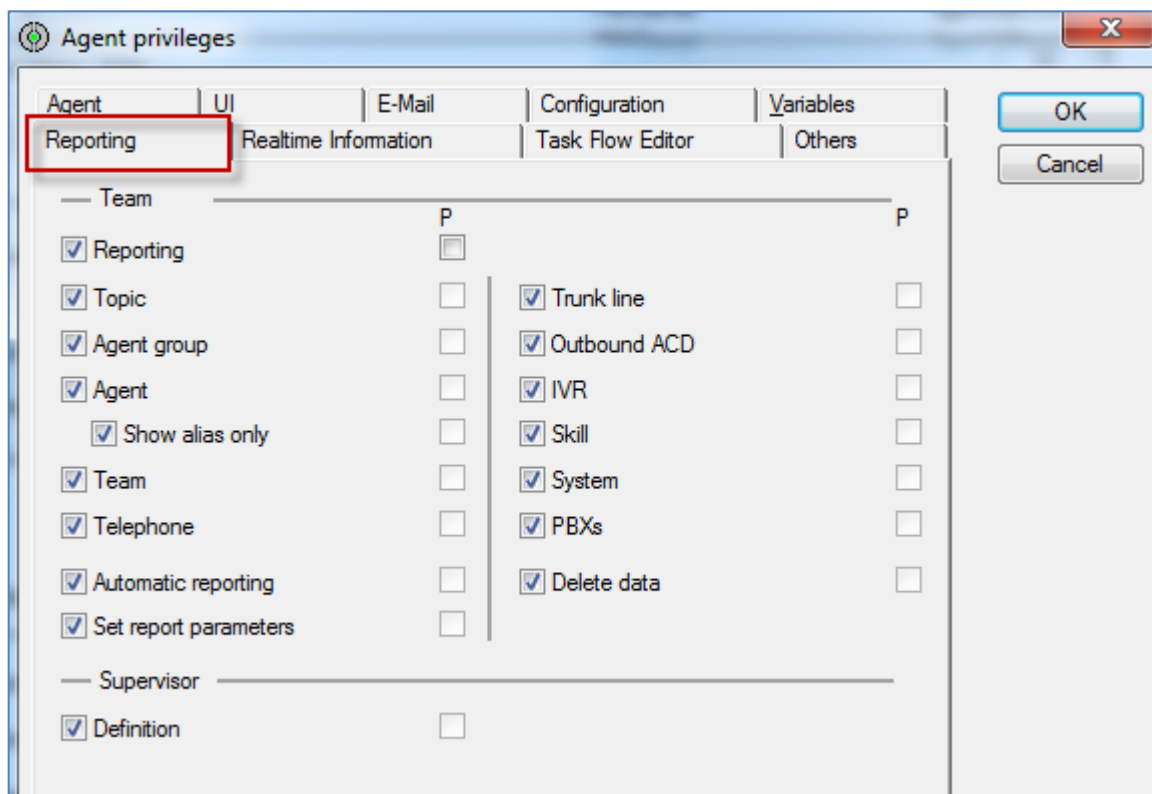




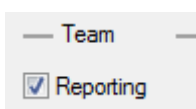
You can also determine whether the agents can assign or change the values of variables, by selecting the **Assign Values** check boxes as indicated below.



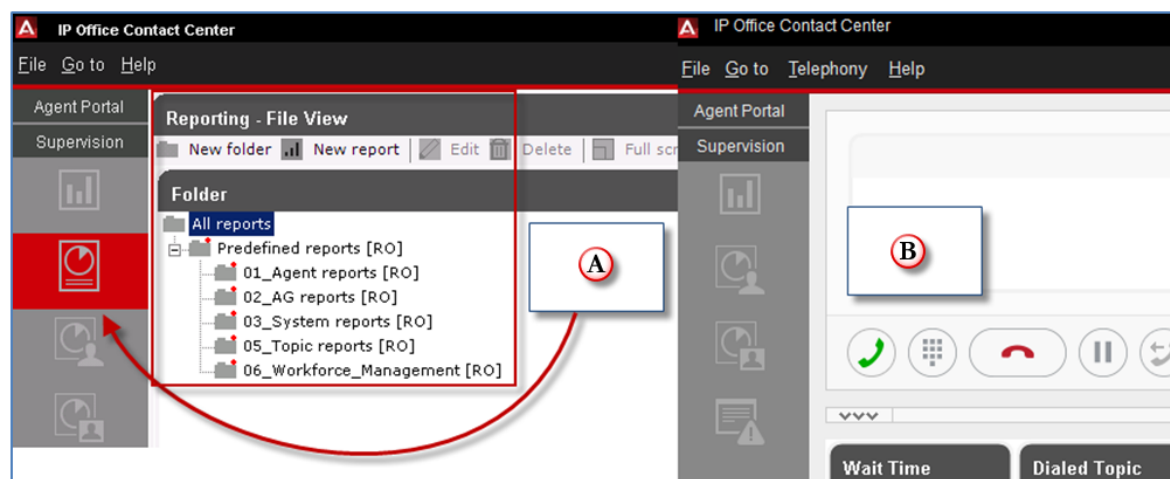
### Agent Privileges – Reporting Tab



### Team Privileges



- The agent can access and use the Reporting module.



- A. With Reporting Privileges
- B. Without Reporting Privileges

☒ Topic - The agent can create reports relating to Topics.

As with the Topic privilege, the agent can be given additional privileges to create other reports when the relevant check box is selected. In similar manner, privileges to generate reports can be removed by selecting the required check box.

☒ Agent group - The agent can create reports relating to Agent Groups.

☒ Agent - The agent can create reports relating to Agents.

☒ Agent  
☒ Show alias only - The agent can create and view reports relating to Agents, the alias rather than the agents name will be shown in the generated report.

☒ Team - The agent can create reports relating to Teams.

☒ Telephone - The agent can create Telephone reports.

☒ Automatic reporting - The agent can configure automatic reports.

☒ Set report parameters - The agent can adjust the report period of predefined reports.

☒ Trunk line - No supported with IP Office Contact Center.

☒ Outbound ACD - The agents can create reports relating to outbound ACD calls.

☒ IVR - The agent can create reports relating to IVR.

☒ Skill - The agent can create reports relating to assigned Agent and Topic skills.

☒ System - The agents can create system reports.

☒ PBXs - The agent can create reports on configured PBX's.

☒ Delete data - The agent can delete reporting data covering a defined period.

## Supervisor Privileges

— Supervisor —  
☒ Definition - The agent can use file manager to configure new reports.

## Agent Privileges – Realtime Information Tab

The screenshot shows the 'Agent privileges' dialog box with the 'Realtime Information' tab selected. The dialog is organized into three main sections: Agent, Team, and Supervisor. Each section contains a list of privileges with checkboxes and a 'P' (Privileged) indicator.

Category	Privilege	Checked	P
Agent	Callback from call list	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Delete from call list	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Pick up call	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Call Redirect	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Team	Realtime information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Remote functions	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Out of office notice	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Trunk realtime information	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Supervisor	Configuration	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Silent Monitoring	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Supervisor Emergency	<input checked="" type="checkbox"/>	<input type="checkbox"/>
	Supervisor Assistance	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## Agent Privileges

— Agent —  
☒ Callback from call list - The agent can use the Call back function.

☒ Delete from call list - The agent can delete calls from the call list.

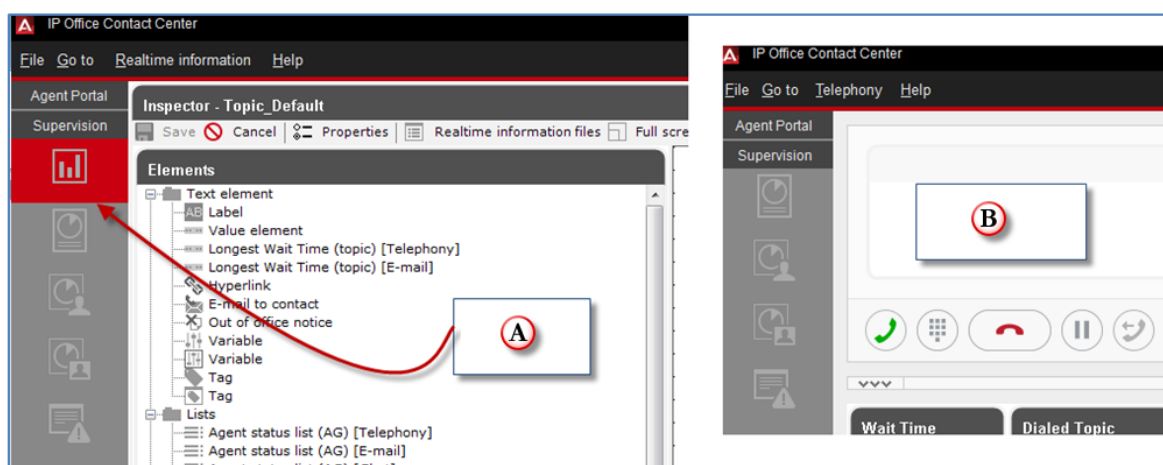
☒ Pick up call - The agent can use the Pickup call function.

☒ Call Redirect - The agent can use the Call Redirect function.

☒ Queue call Redirect - The agent can distribute waiting calls from the queue to a free agent.

## Team Privileges

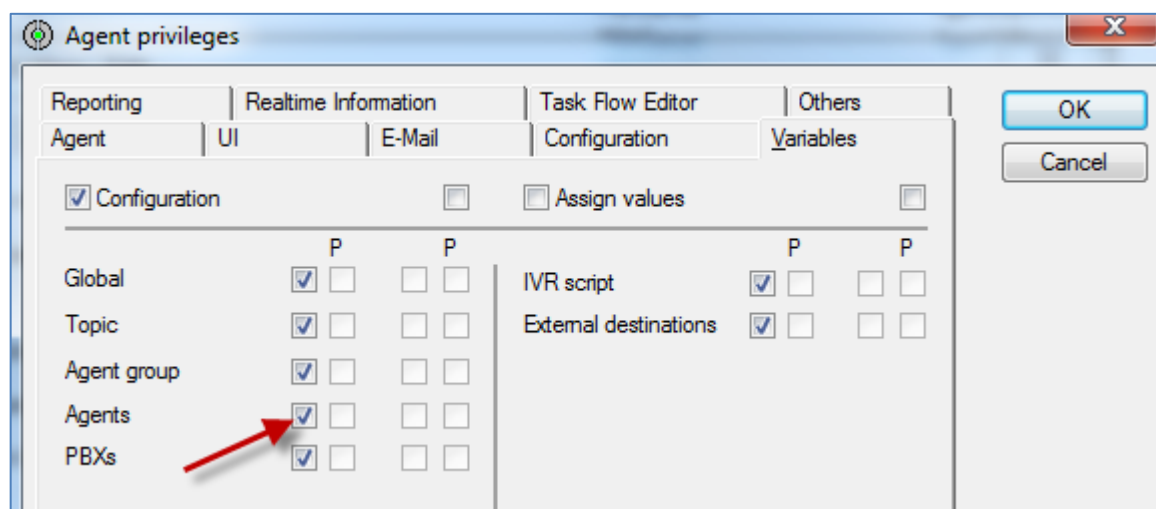
☒ Realtime information - The agent can use the Realtime Information module.

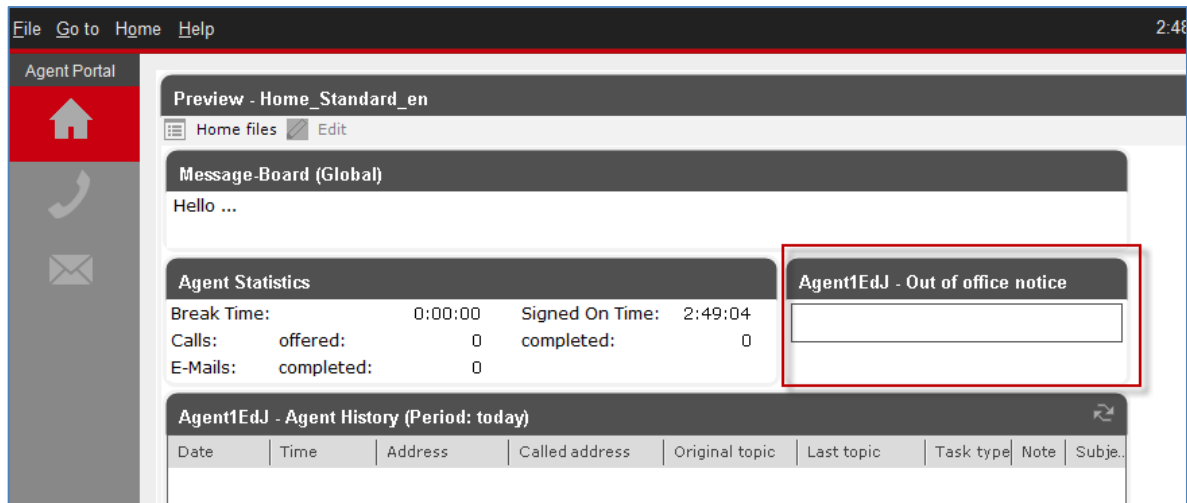


A. With Realtime Information Privileges.  
B. Without Realtime Information Privileges.

☒ Remote functions - The agent can use Remote Functions

☒ Out of office notice - The agent can configure the Out Of Hours' notice for another agent for whom he/she is authorized.





☒ Trunk realtime information

- Not supported with IP Office Contact Center.

☒ Agent History

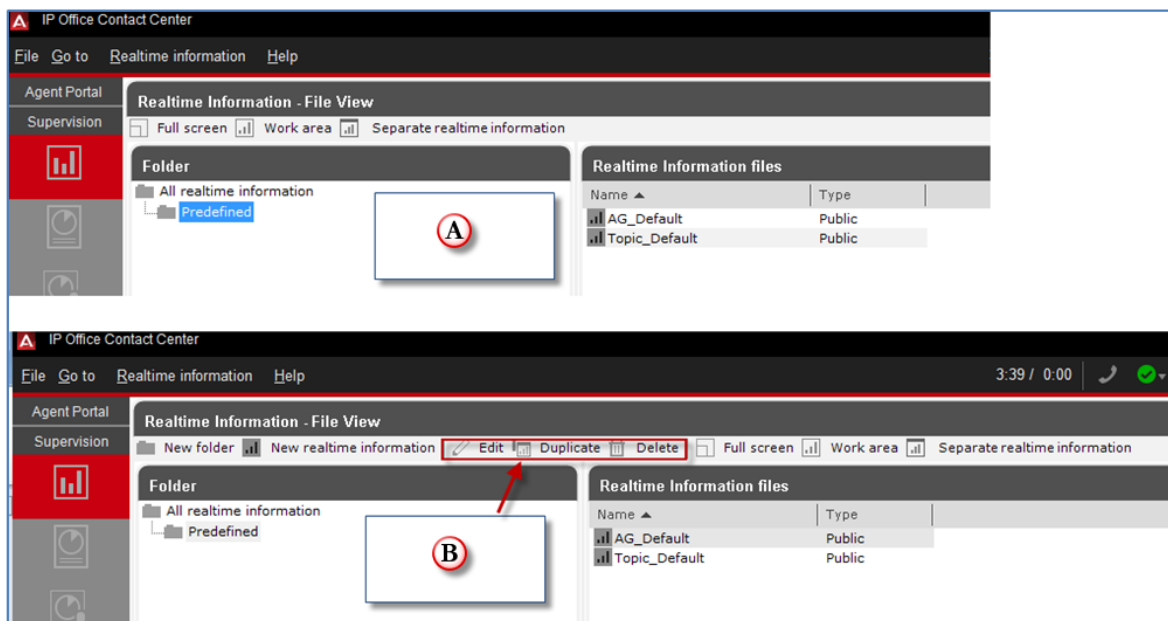
- The agent can view agent history settings from another agent. (Authorization required).

## Supervisor Privileges

Note: To utilize Supervisor privileges the IP Office Contact Center user must be assigned a Supervisor license.

☒ Configuration

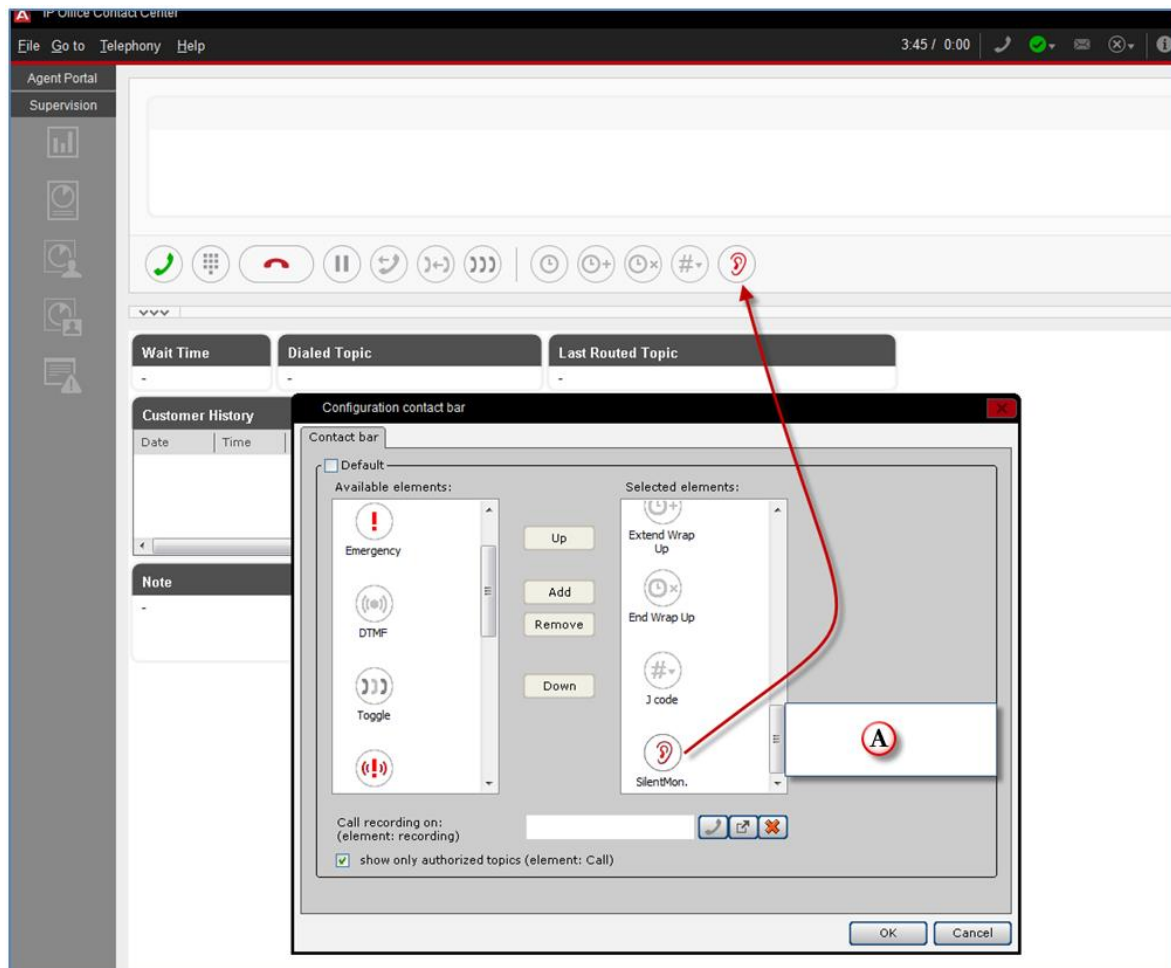
- The agent can configure system wide and individual real time information.



A. Without Supervisor Configuration privileges

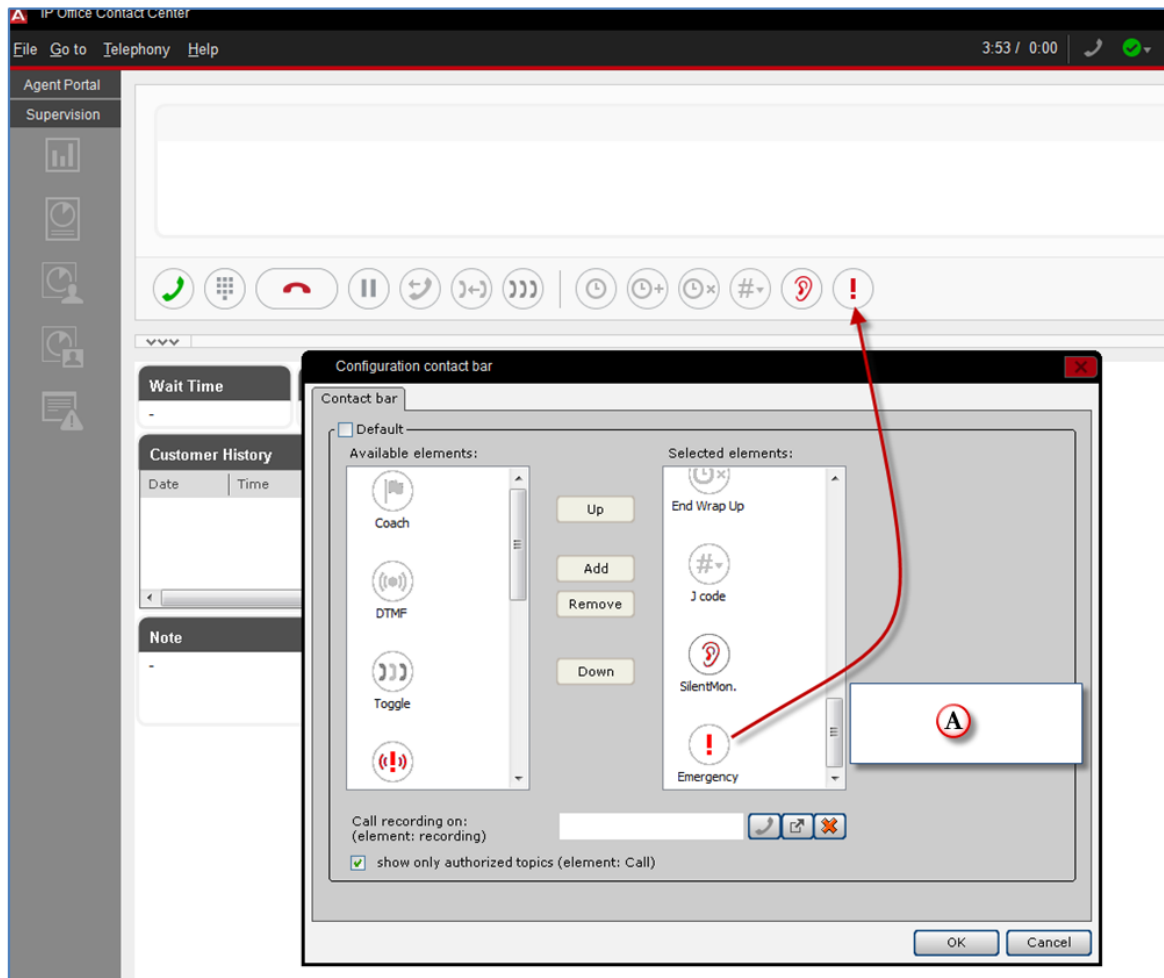
B. With Supervisor Configuration privileges

- ☒ **Silent Monitoring** - The agent can utilize the Silent Monitoring function in the telephone contact bar.



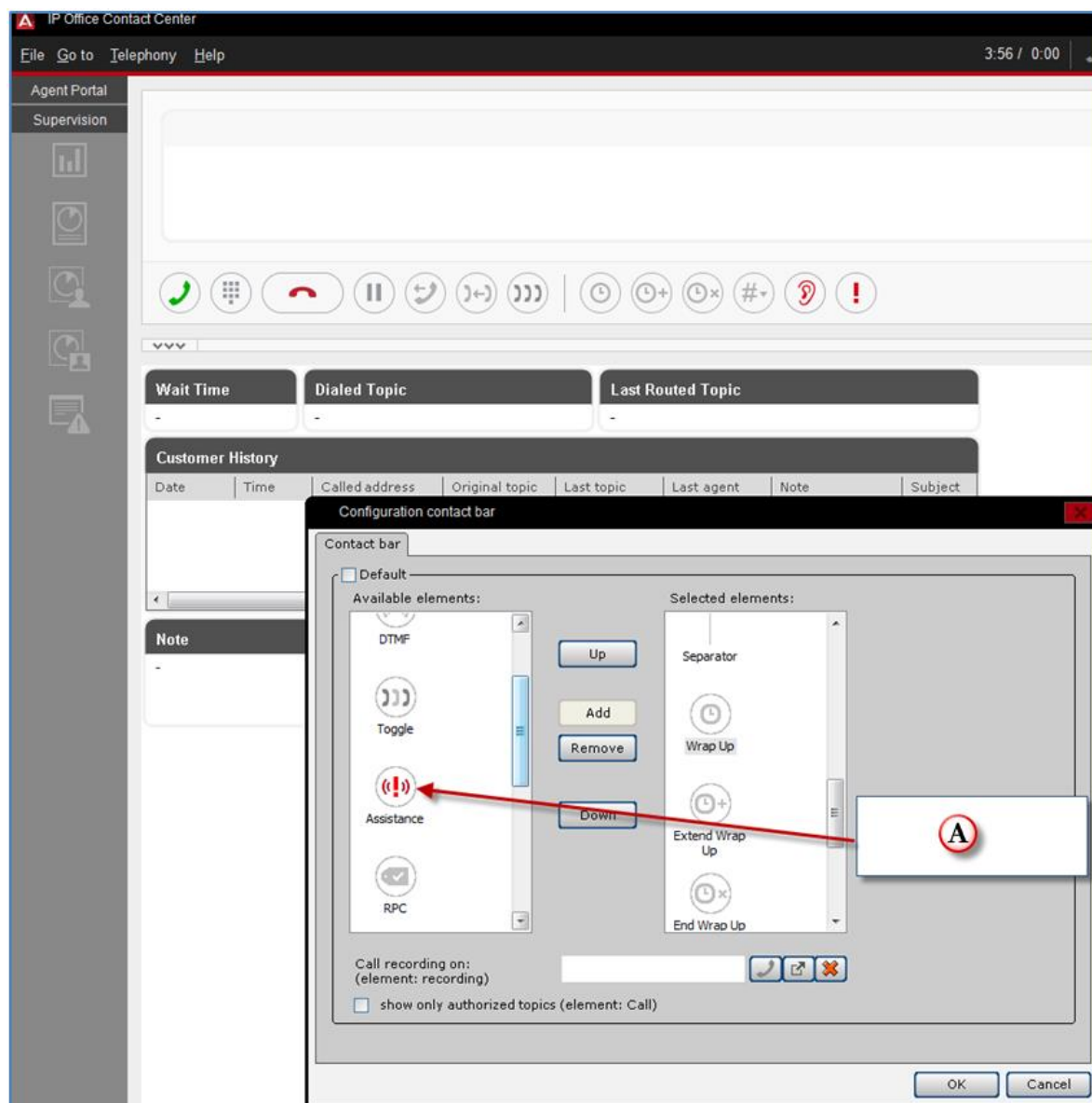
A. The Silent Monitoring element has to be manually added to the Contact bar.

- ☒ **Supervisor Emergency** - The agent can use the Supervisor Emergency function.



A. The Supervisor Emergency element has to be manually added to the Contact bar.

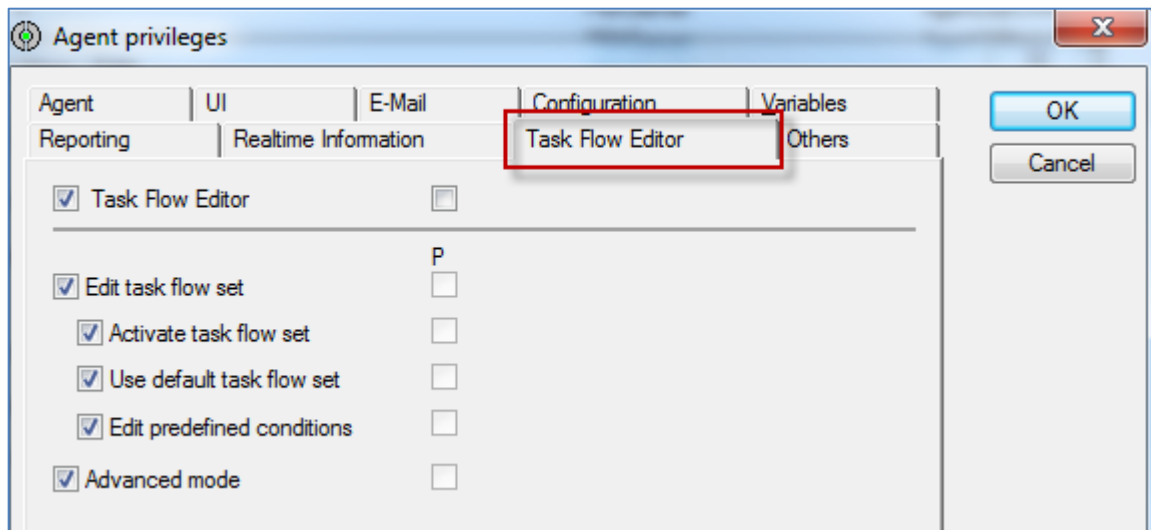
☒ **Supervisor Assistance** - The agent can use the supervisor Assistance and Silent Monitoring functions.



- A. The Supervisor Assistance element has to be manually added to the Contact bar.

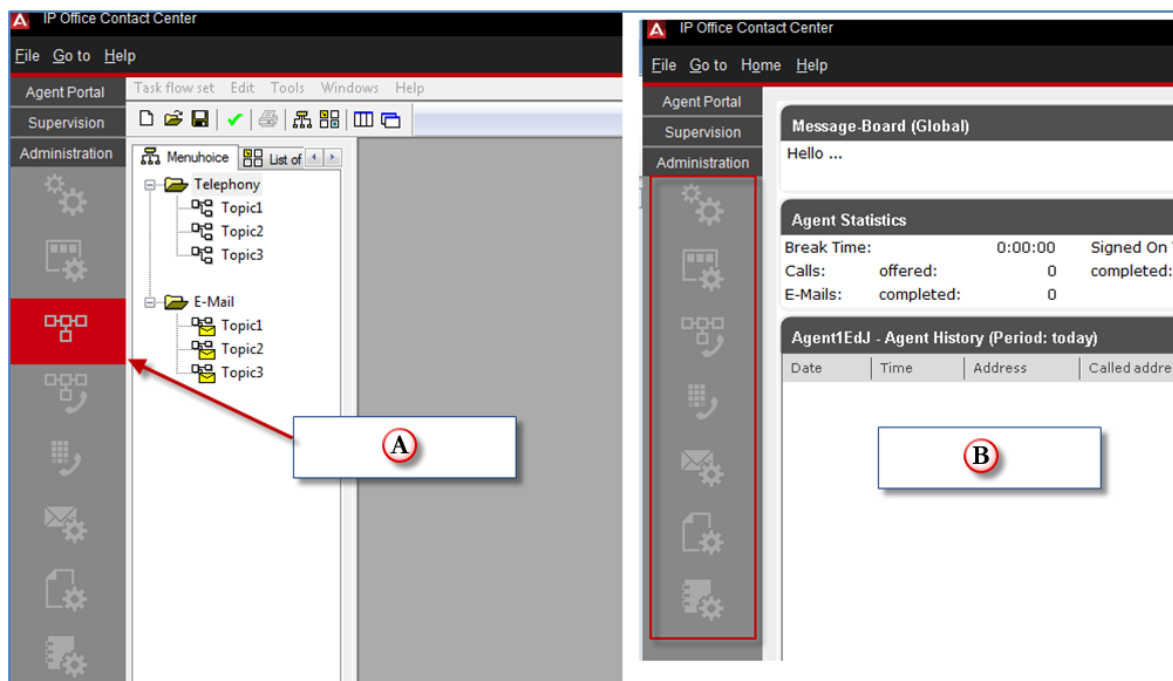


## Agent Privileges – Task Flow Editor Tab



☒ Task Flow Editor

- The agent can use Task Flow Editor.



A. With Task Flow Editor privileges.

B. Without Task Flow Editor privileges.

☒ Edit task flow set

- The agent can edit a Task Flow.

☒ Edit task flow set

☒ Activate task flow set

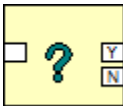
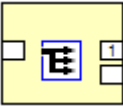
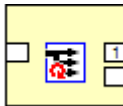
- Allows the agent to activate a Task Flow.

☒ Edit task flow set  
☒ Activate task flow set  
☒ Use default task flow set - Allows the agent to define the default task flow set. If there is a system failure or reboot, the default Task Flow Set is utilized.

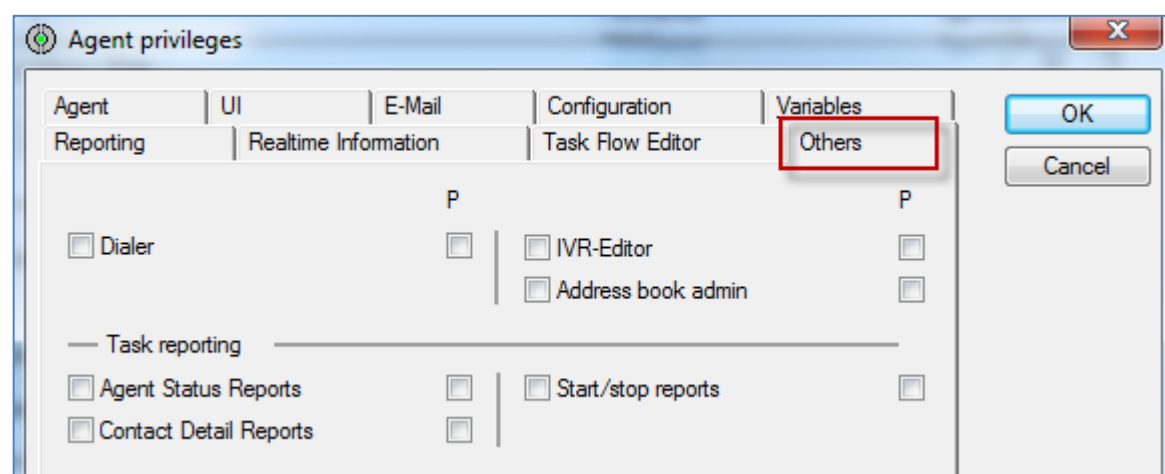
☒ Edit task flow set  
☒ Activate task flow set  
☒ Use default task flow set  
☒ Edit predefined conditions - Allows the agent to edit predefined conditions.

☒ Advanced mode - Enables Task Flow Editor's Advanced mode.

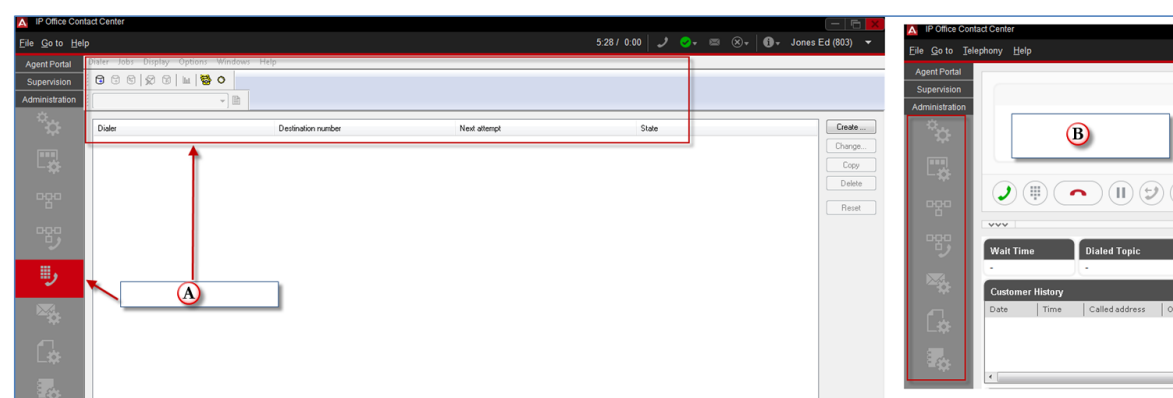
**Note:** This privilege is required to use the following elements.

Logic , Distributor (equal) , Distributor (cyclically) 

## Agent Privileges – Others Tab

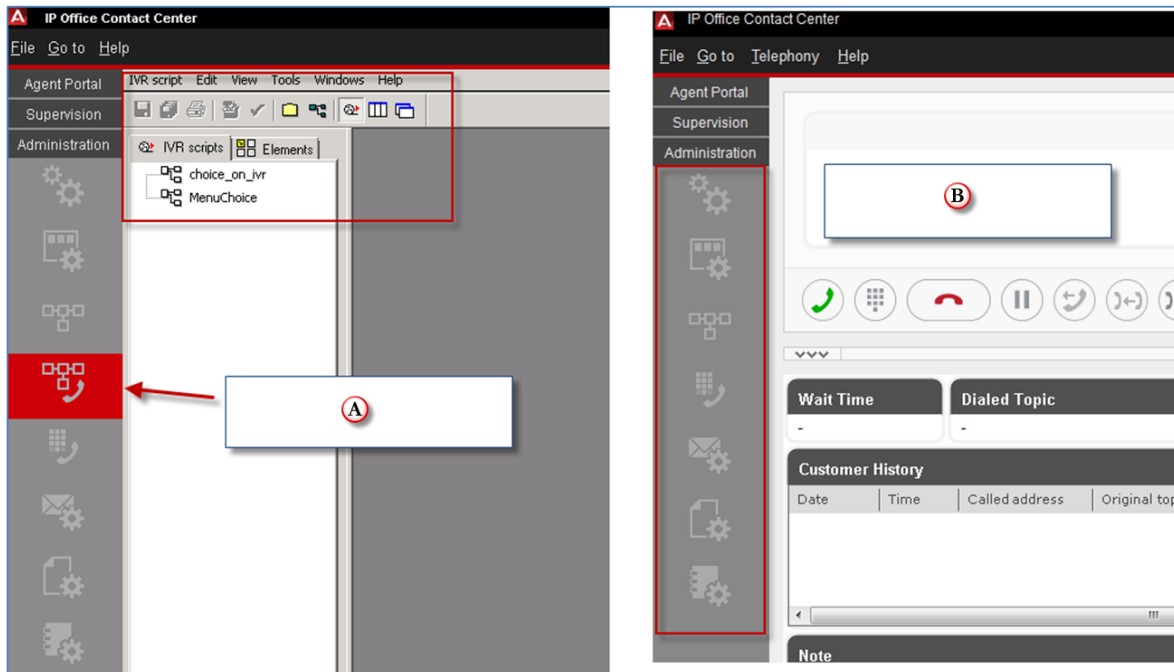


☒ Dialer - The agent can use the Dialer module.



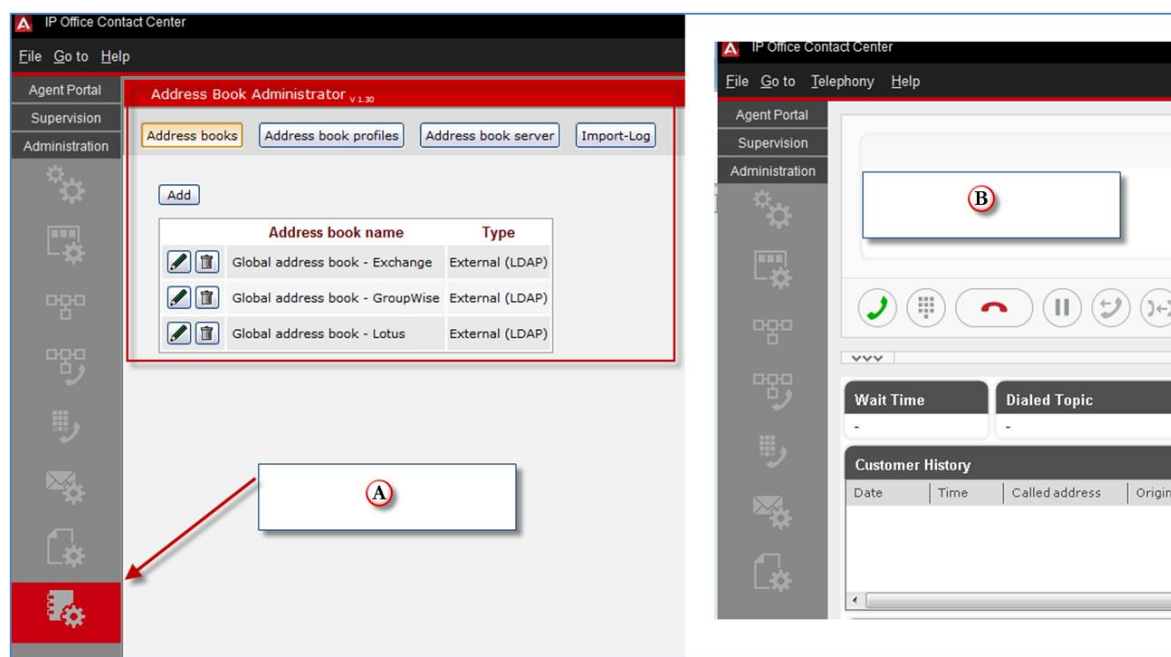
- A. With Dialer privileges
- B. Without Dialer privileges

☒ IVR-Editor - The agent can use IVR Editor.

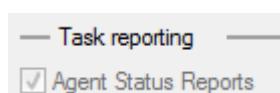


- A. With IVR Editor privileges
- B. Without IVR Editor privileges

☒ Address book admin - The agent can administer the Address book.



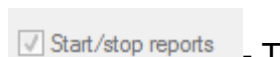
- A. With Address Book Admin privileges  
B. Without Address Book Admin privileges



- The agent can utilize the Agent Status Report.



- The agent can utilize the Contact Details Report.



- The agent can start and stop reports.

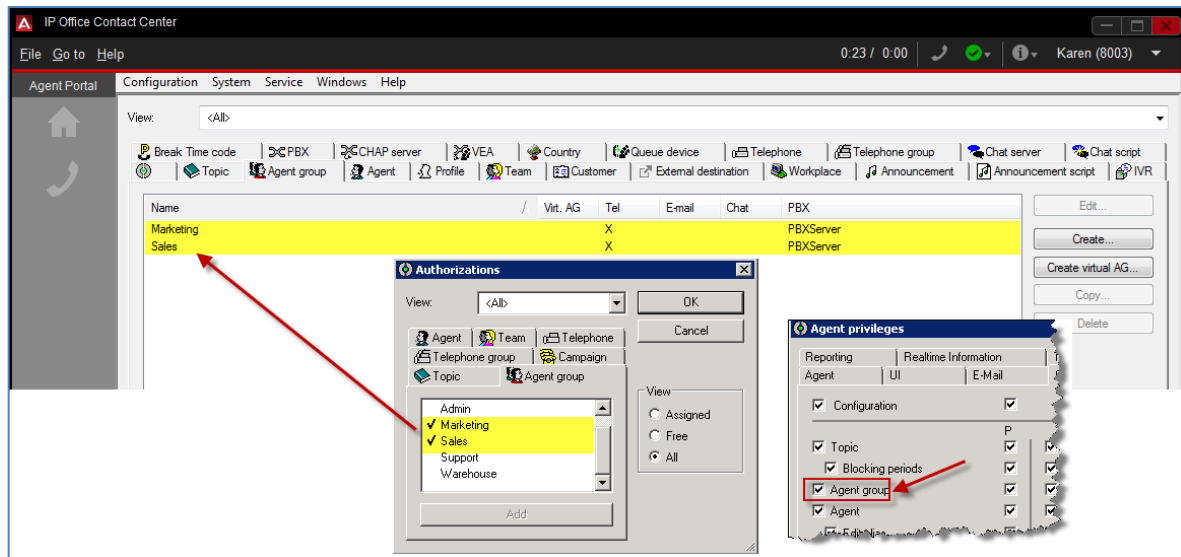
## Authorizations

Authorizations are used to determine which Topics, Agents, Agent Groups, Workplaces and Teams an agent can view and potentially configure from their agent profile.

They also determine which Topics an agent can dial from to make an external call.

Note that an agent may require additional privileges to configure authorized features of IP Office Contact Center. For example, the authorization can determine which agents groups an agent can configure, if they have the Agent Group configuration privilege.

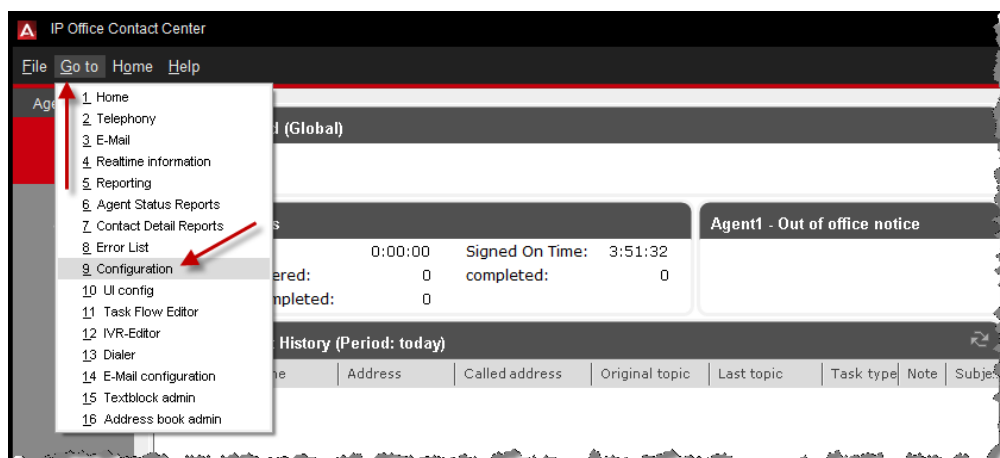
In the example below, the agent can view and configure the Marketing and Sales Agent Group but they do not have Authorization to view the Admin, Support or Warehouse groups.



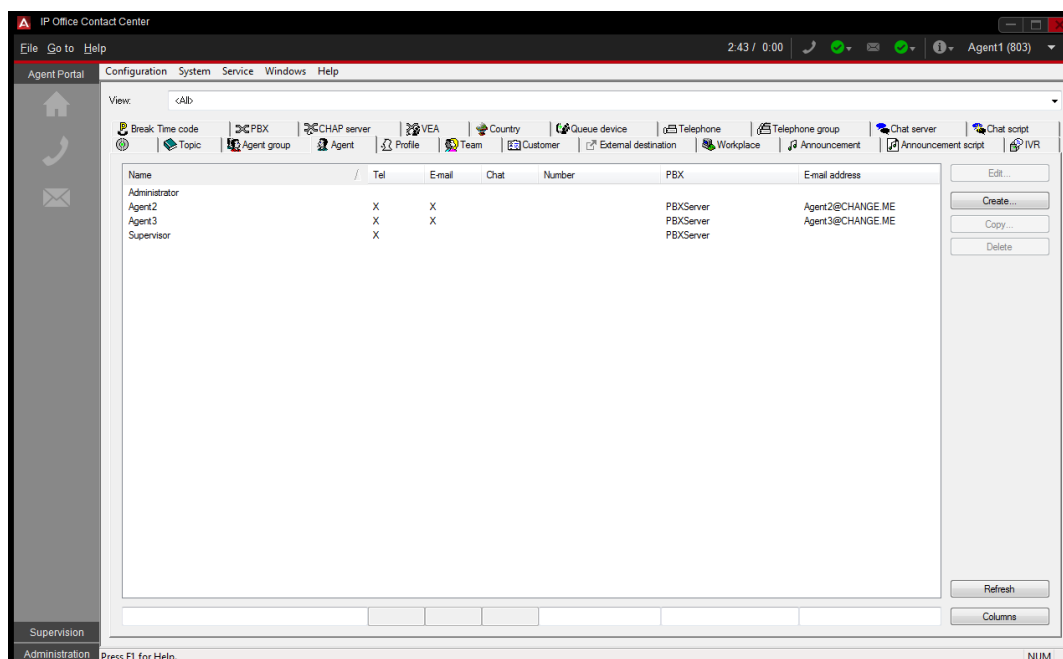
Authorizations are important in relation to supervisor views, for example as an Email Supervisor in the folder overview. Only emails for authorized agents and topics are viewed and can be selected for example.

To view the Authorizations for an agent:

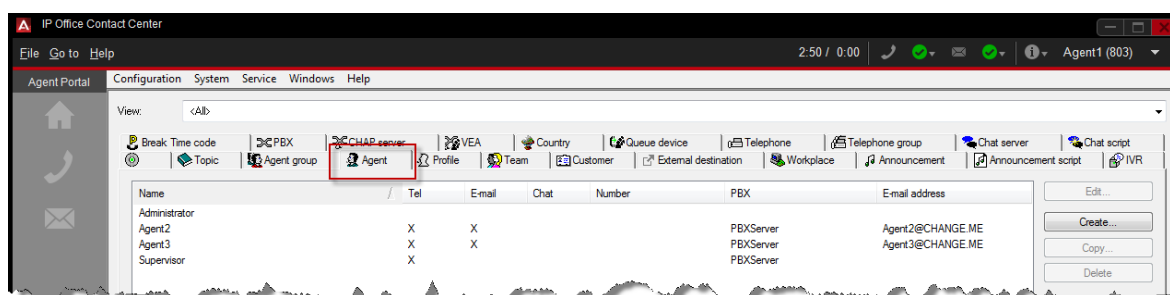
1. From the User Interface Menu bar, select **Go to** followed by **Configuration**.



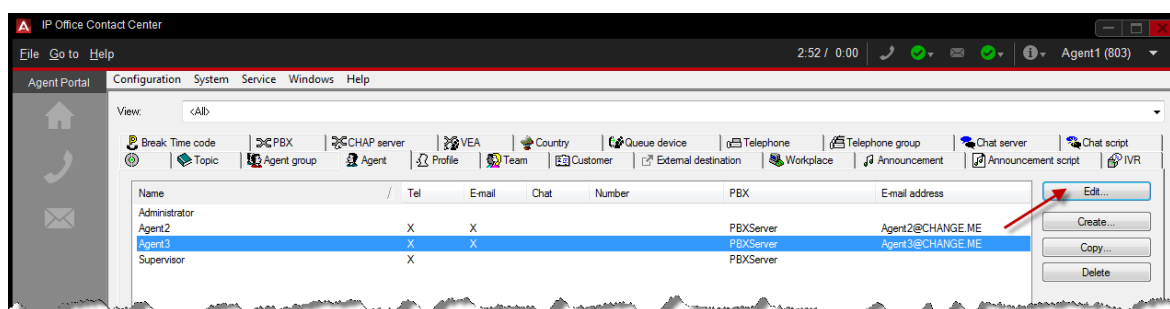
2. The **Configuration Interface** is displayed.



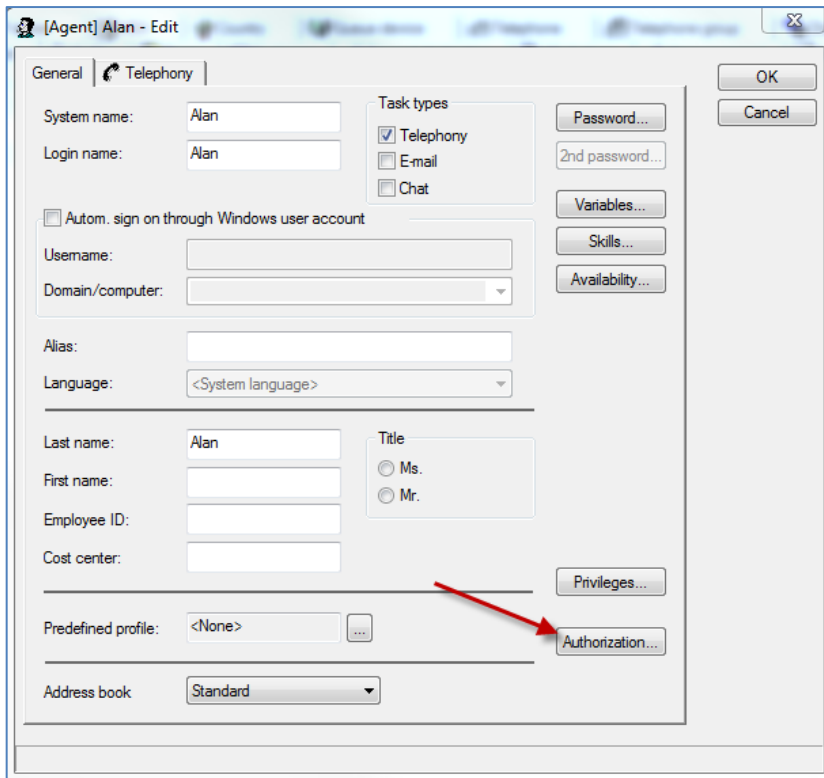
3. Click the **Agent** tab.



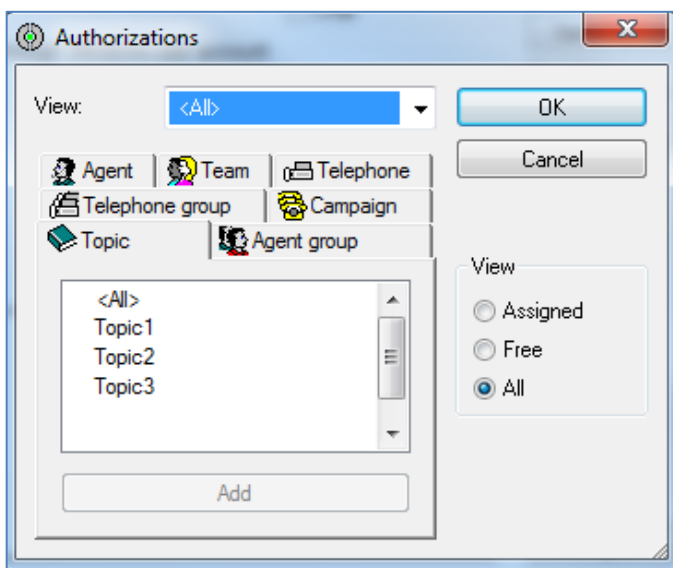
4. Select the Agent to which a password will be assigned, then click the **Edit** button.



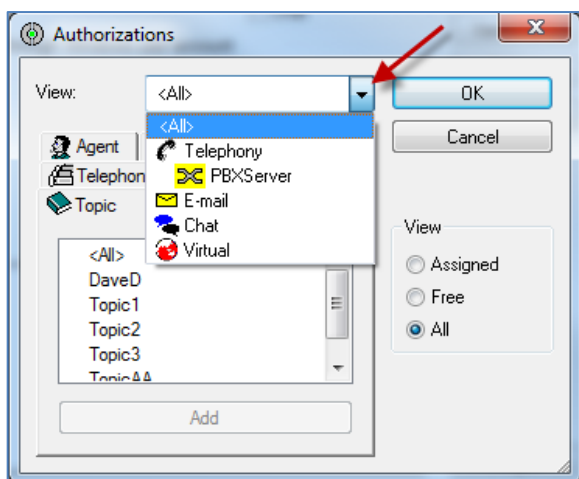
5. The Edit dialogue box is displayed, click the **Authorization** button.



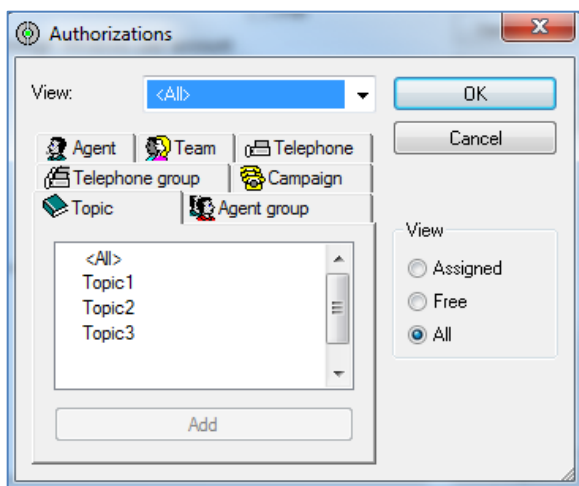
6. The **Authorizations** dialogue box is displayed.



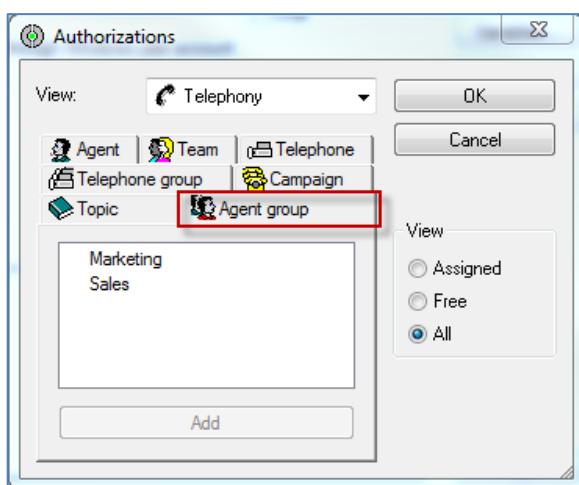
7. All or individual authorizations types can be viewed.



8. In this example, **All** has been selected from the **View** drop down list.

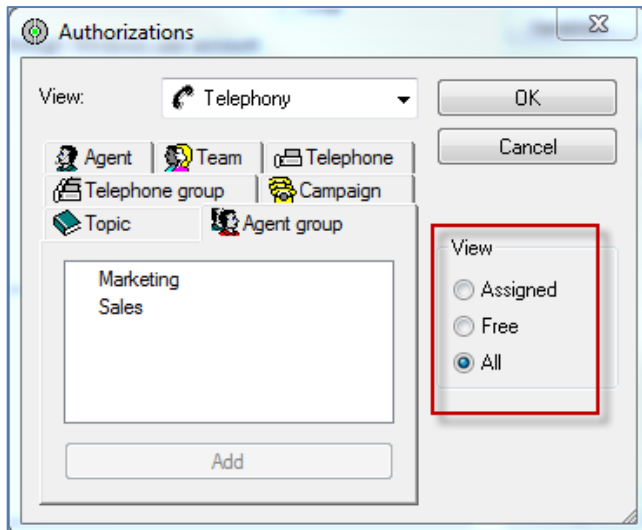


9. To assign an Authorization to an agent, select the required tab. In this example the Agent Group tab has been selected.

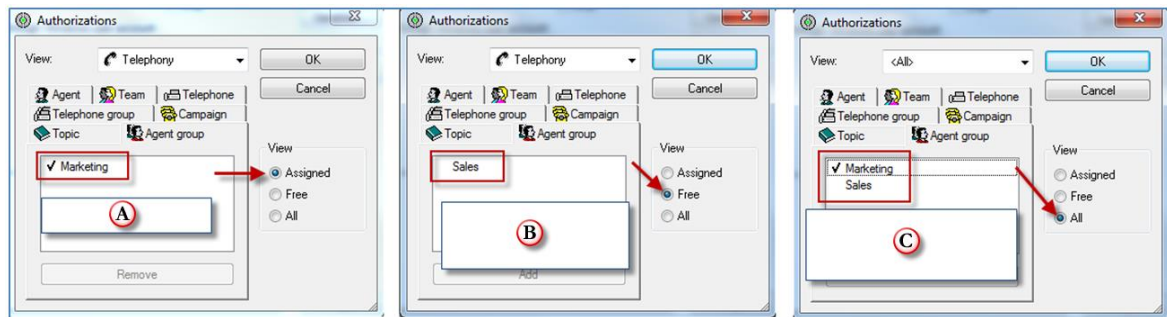


10. Then select one of the **View** radio buttons.



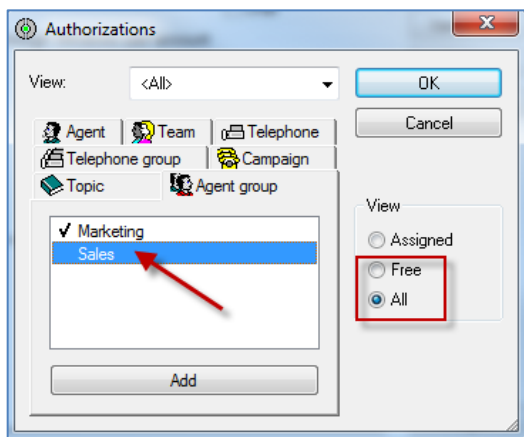


11. When the **View** radio buttons are selected, they show those groups that have been assigned or are available to be assigned to the agent.

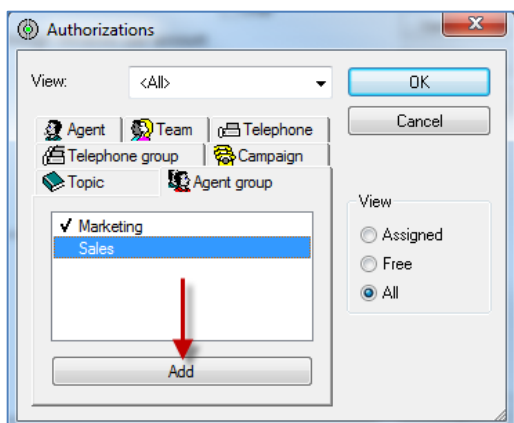


- A. Assigned
- B. Available for assignment
- C. Both assigned and Unassigned

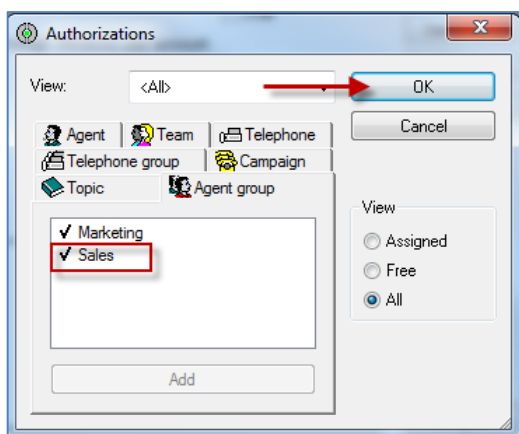
12. To assign an Agent Group, Topic etc to the agent, first click the **All** or **Free** radio button, then select the parameter (in this example the Agent Group) to be assigned.



13. Click the **Add** button.



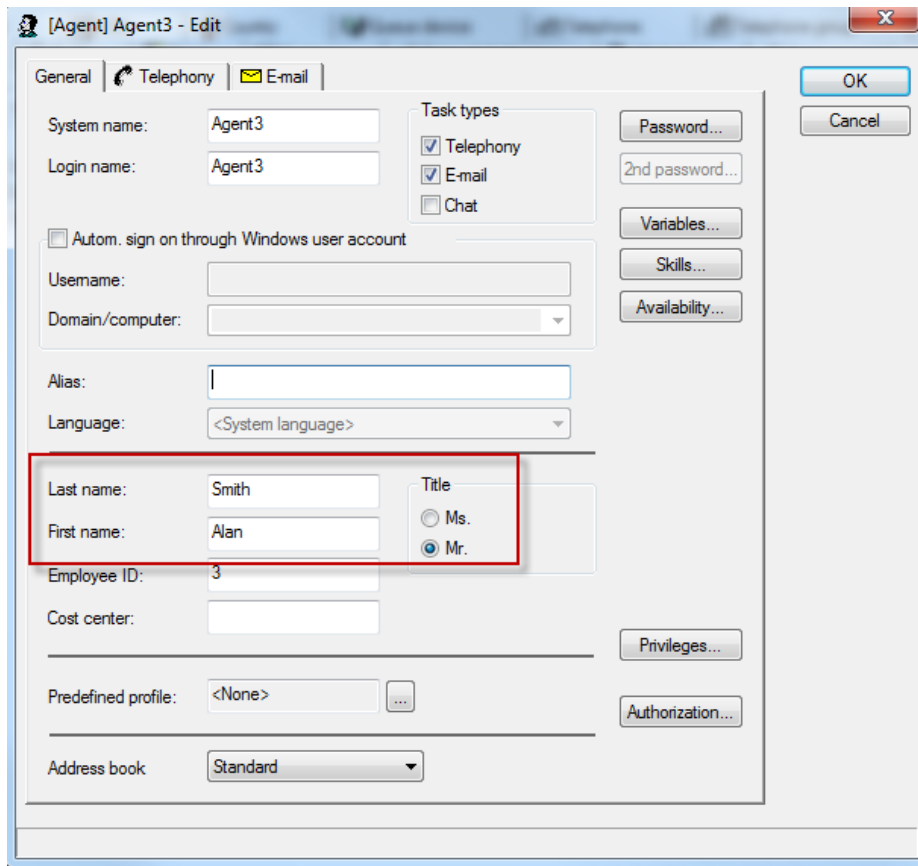
14. The Group will be assigned, as indicated by a tick adjacent to the Group's name. Click the **OK** button.



15. The above process can be repeated to assign additional authorizations to agents.

## Additional Agent Settings

### Last Name First Name



[Agent] Agent3 - Edit

General | Telephony | E-mail

System name: Agent3

Login name: Agent3

Task types

- ☒ Telephony
- ☒ E-mail
- ☐ Chat

☐ Autom. sign on through Windows user account

Username:

Domain/computer:

Alias:

Language: <System language>

Last name: Smith

First name: Alan

Title

- ☐ Ms.
- ☒ Mr.

Employee ID: 3

Cost center:

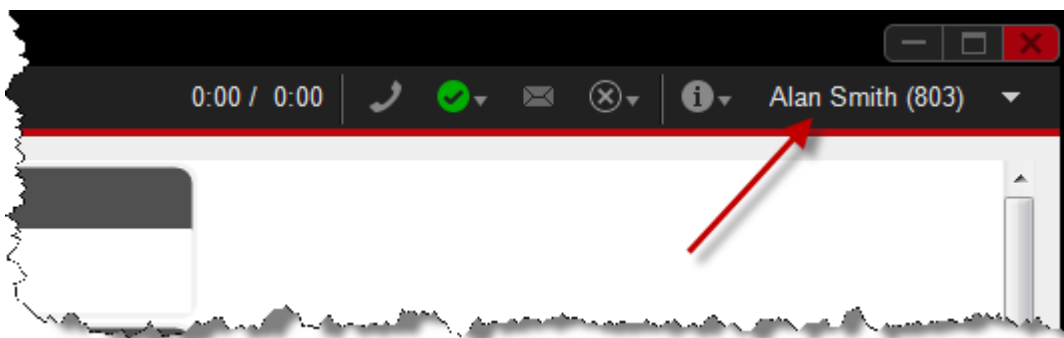
Predefined profile: <None>

Address book: Standard

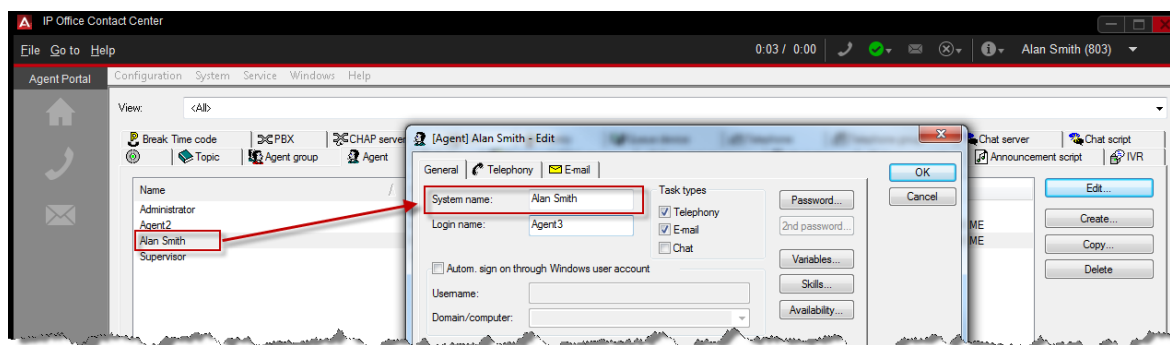
Buttons: Password..., 2nd password..., Variables..., Skills..., Availability..., Privileges..., Authorization...

Buttons: OK, Cancel

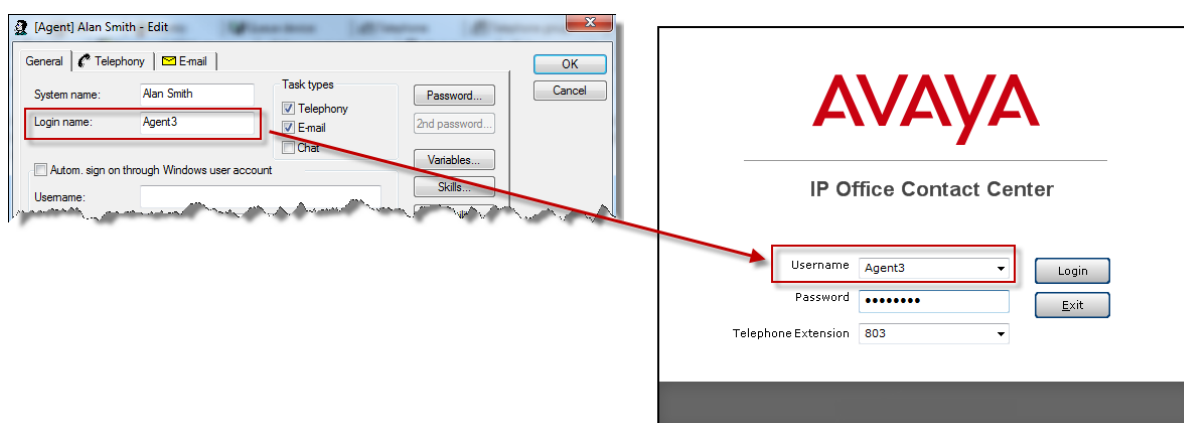
1. By entering a **Last name** and **First name** for the agent, the agents name will be displayed on the User Interfaces menu bar.



2. The **System name** is a system wide setting that identifies the agent.

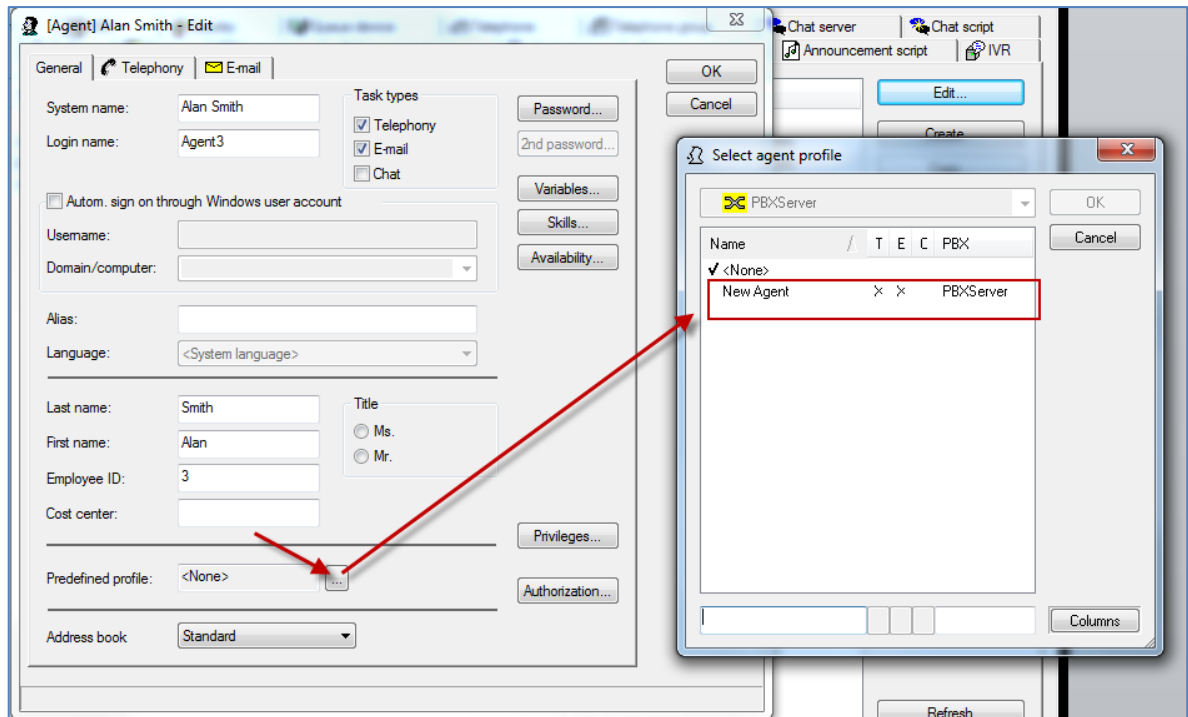


- The **Login name** identifies the name that the user must enter in the **User Name** field to sign on to the user Interface.



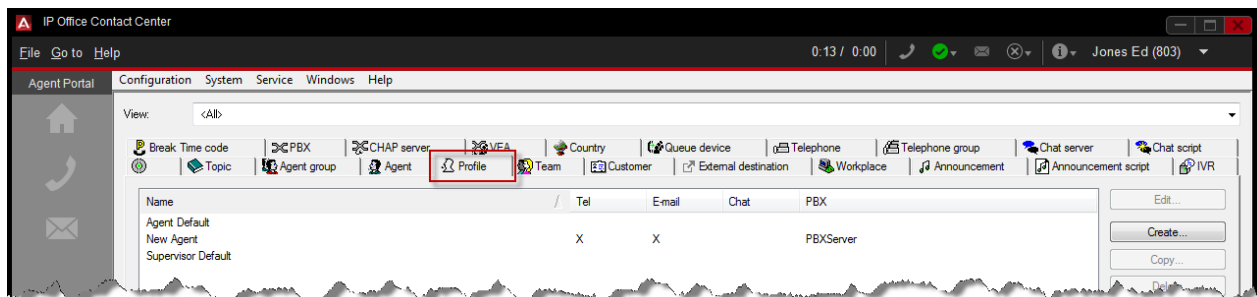
- The **Predefined profile** option allows the Agent to be assigned against a previously configured profile. The profile contains settings that can be applied to a specific group of agents. For example, a profile for the sales department may have different assigned privileges than a profile for the IT Support department.

An agent profile can include settings relating to group authorizations, privileges, assignment, and the Task Type; Telephone, Email or Chat.

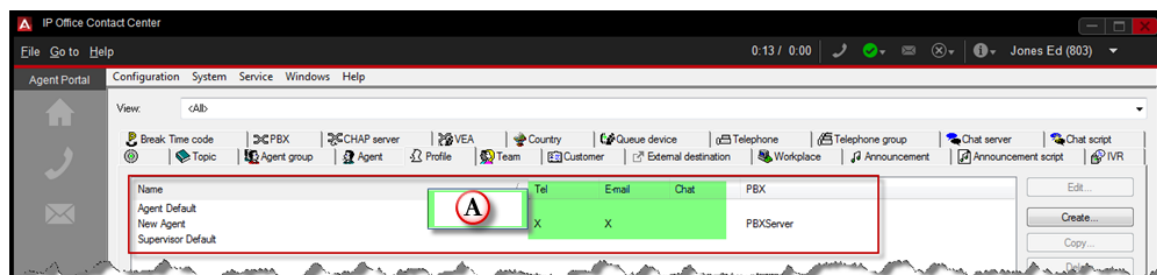


## Creating Profiles

1. To create a Profile, from the **Configuration** interface select the **Profile** tab.

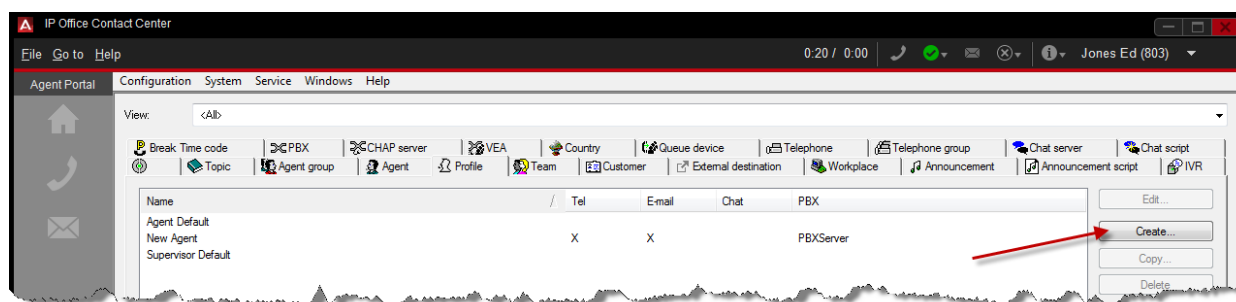


2. Any existing profiles are displayed including the **Task Type** assigned to this profile.

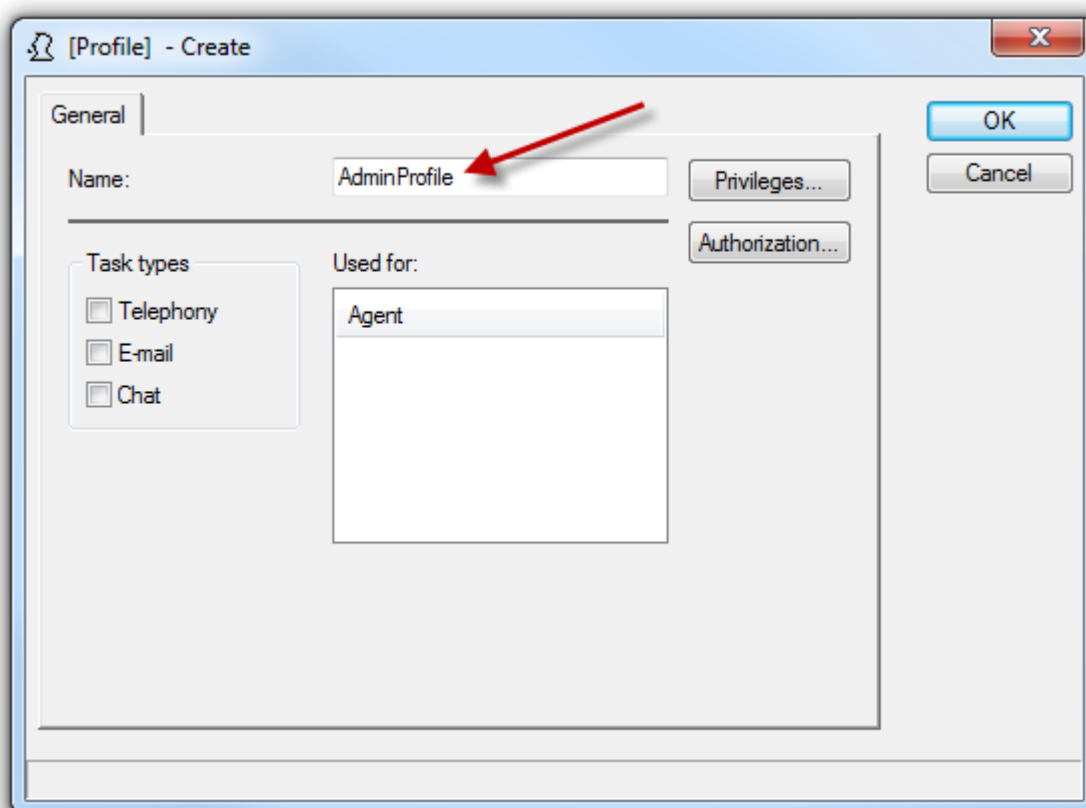


A. Task Types

3. Click the **Create** button.

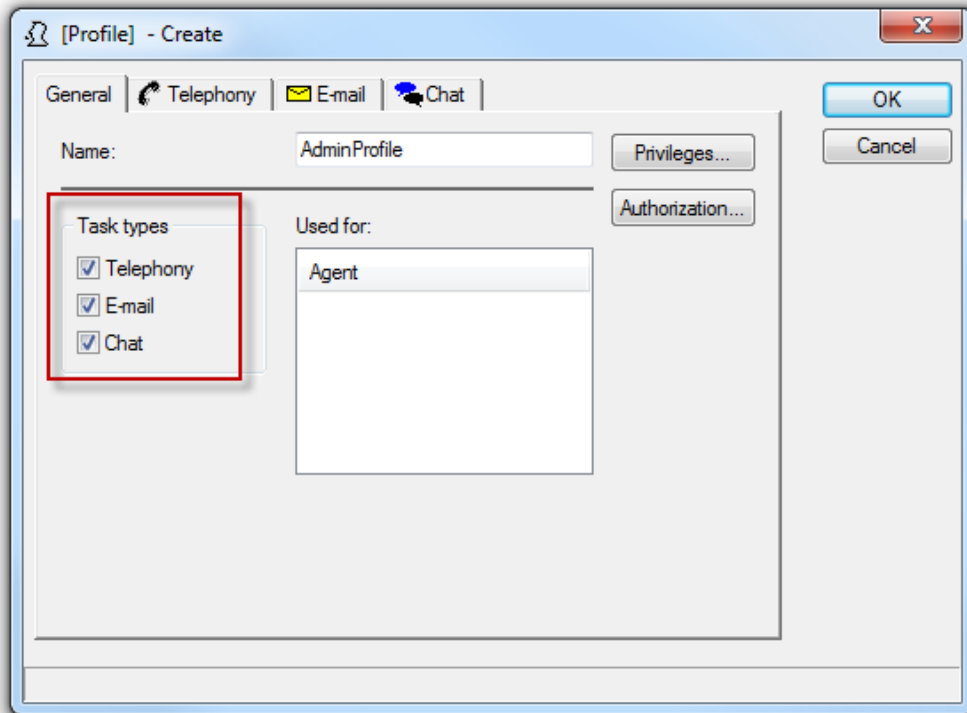


4. The **Create Profile** dialogue box is displayed. In the **Name** field, enter a name for the profile.

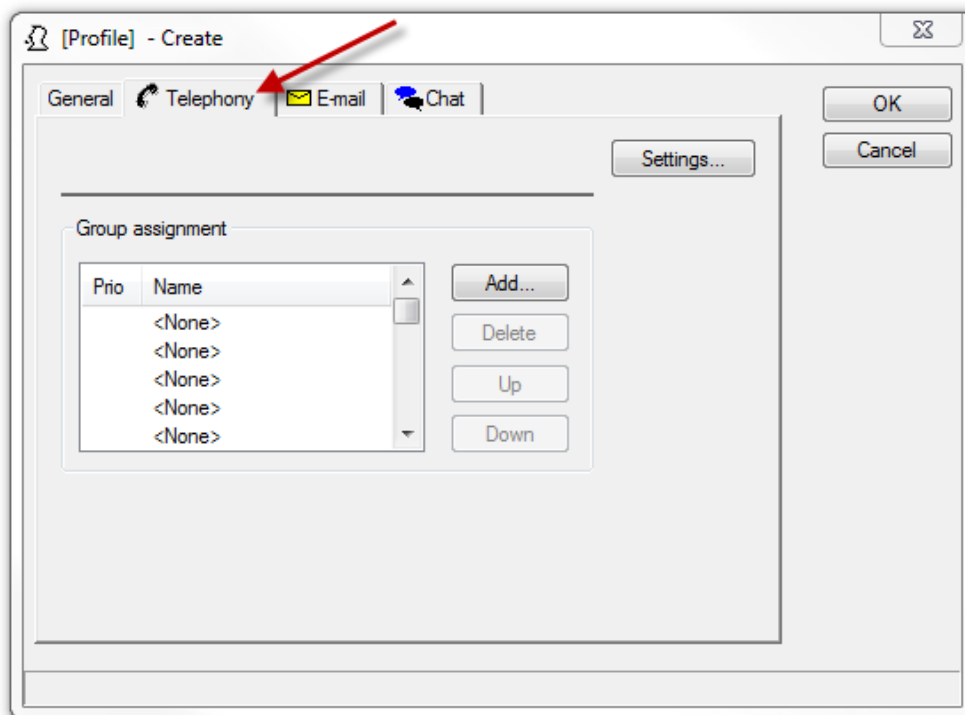


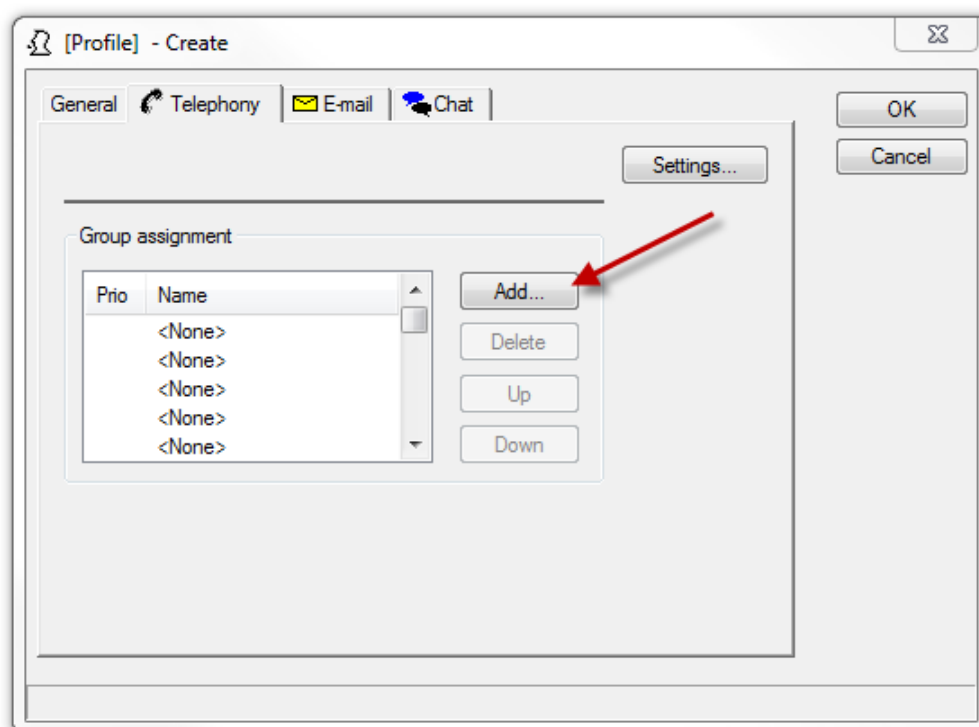
5. Agents and the Profiles, to which they can be assigned, can be granted with Privileges and Authorization rights. Please see the **Privileges and Authorization** section of this guide for further details.

6. Select the **Task Type(s)** to be assigned to this profile.

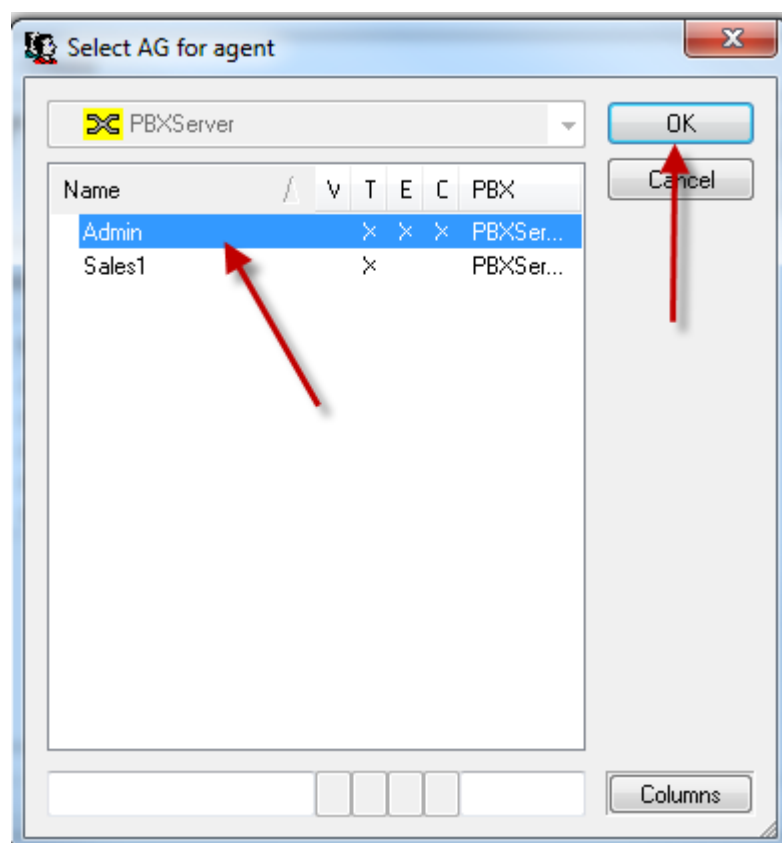


7. In this example, all three Task Types have been selected. Click the **Telephony** tab.



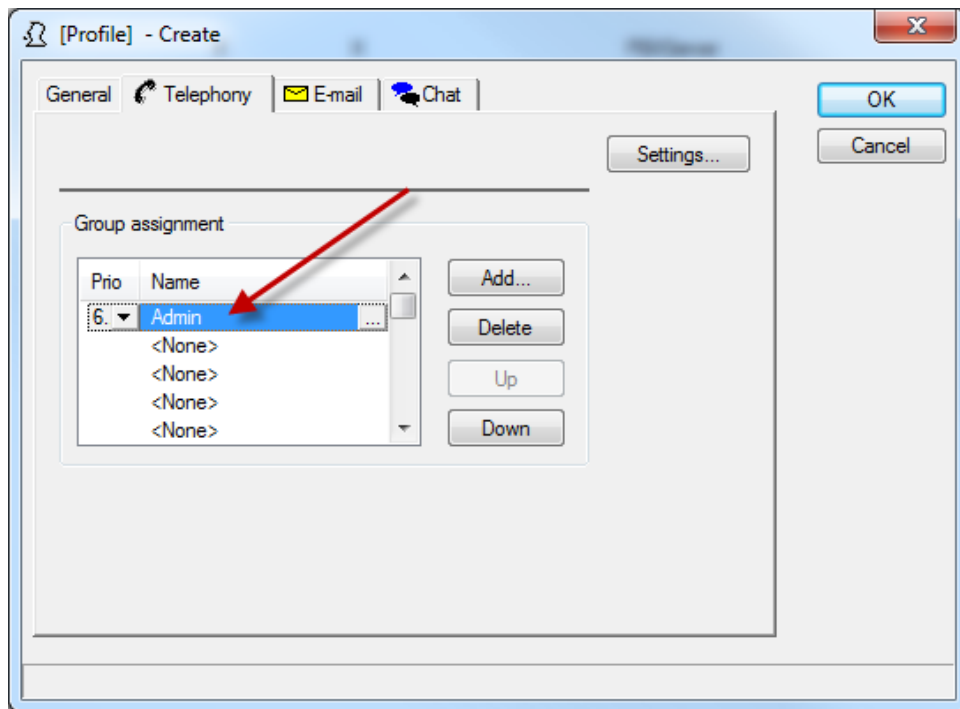
8. Click the **Add** button.9. Select the Group to be assigned to this profile. Then click the **OK** button.

**Note:** Groups must have been previously configured, before they will appear in the **Select AG for Agent** dialogue box.

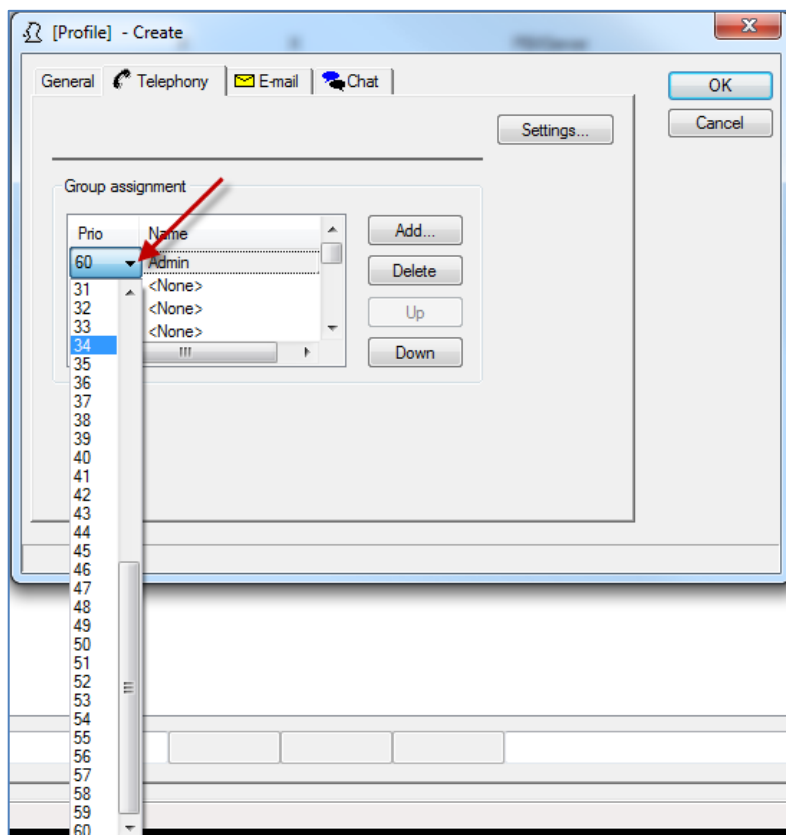




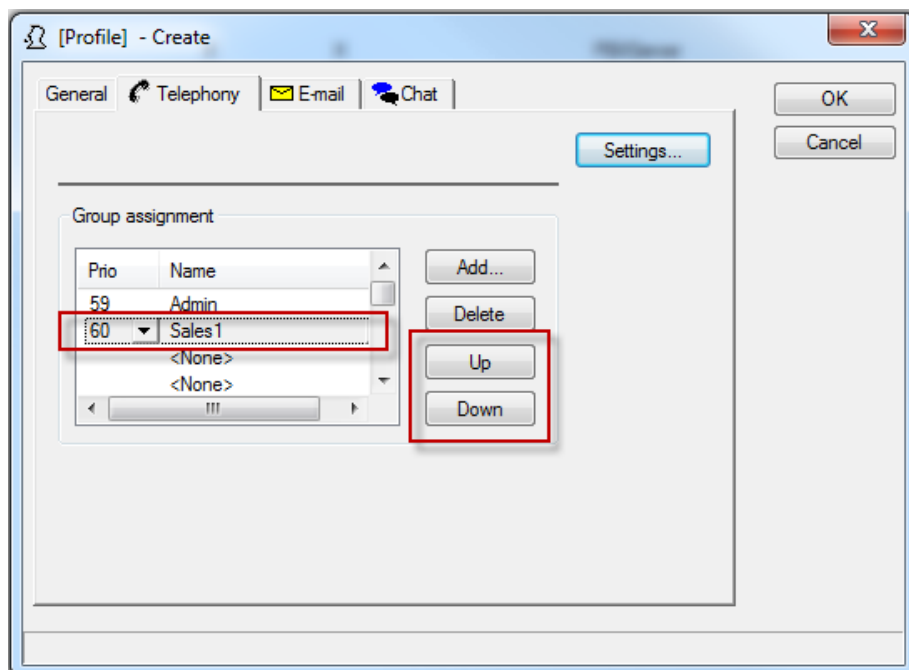
10. The assigned Group is displayed.



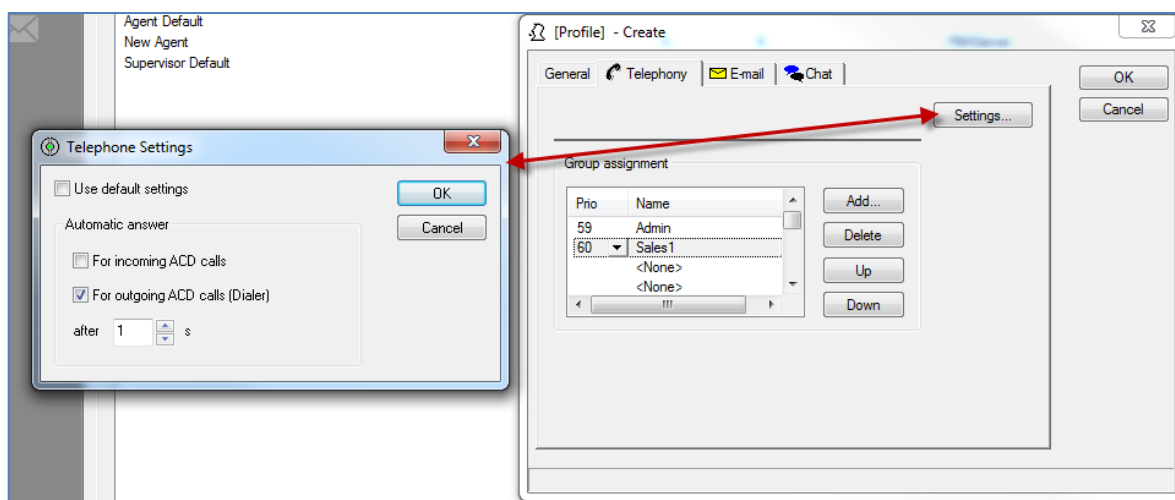
11. A priority can also be given to the groups assigned to the Task Type Telephony, from priority 1 the highest priority, to 60 the lowest priority. The default priority is 60. To change a priority, click the **Prio** drop down box and select the required priority.



12. If more than one group is assigned, the groups can be moved to their required order by selecting the group and clicking the Up or Down arrow.



13. The Telephone Settings relating to this profile can be configured by clicking the **Settings** button.

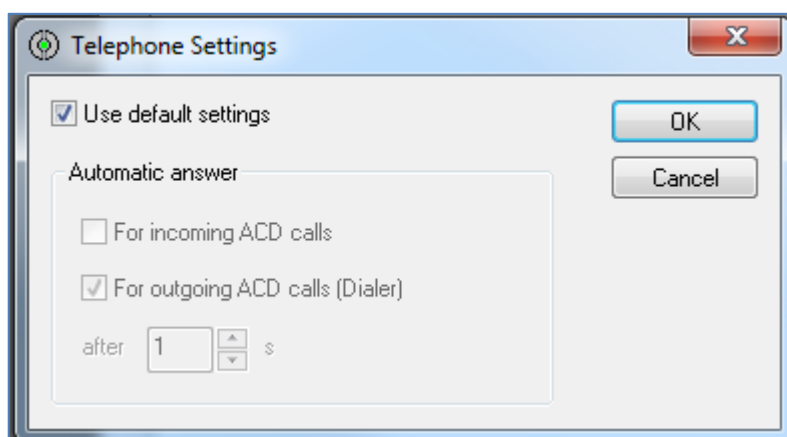


14. The **Use Default Settings** check box is selected by default. To change the setting, deselect the check. A number of settings can then be configured as required:

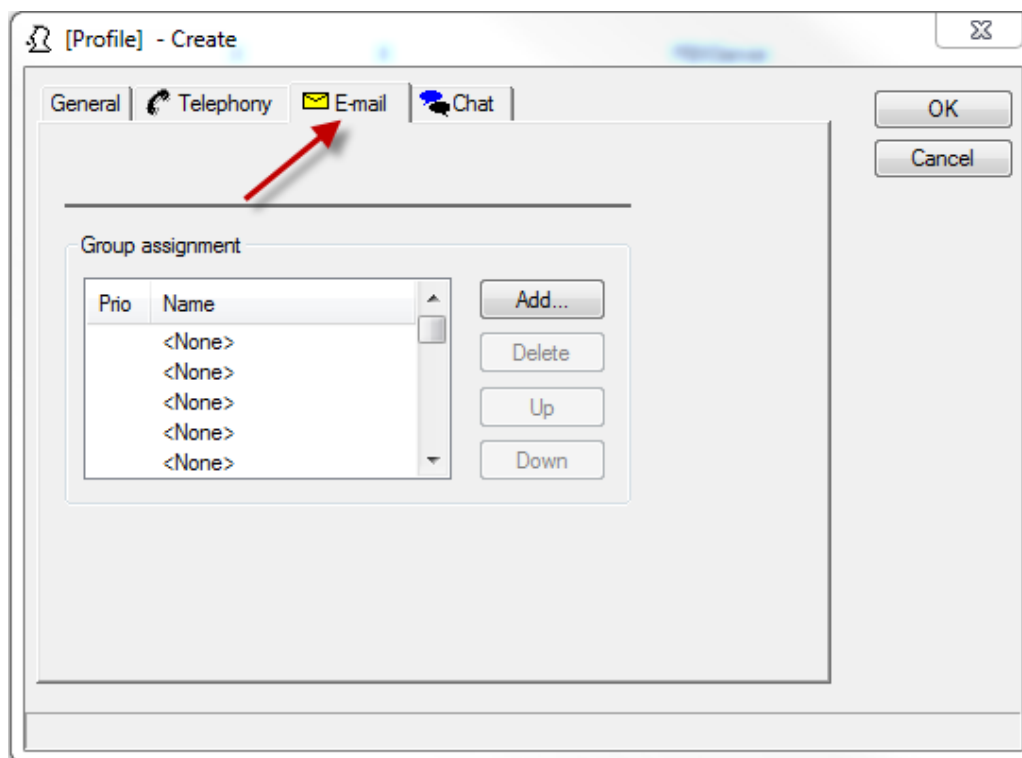
**For Incoming ACD Calls** – When selected, this enables automatic answer rather than manual answer for agents assigned with this profile.

**For Outgoing ACD Calls** – This setting is used with the Dialer facility. When selected, this enables automatic answer rather than manual answer for agents assigned with this profile.

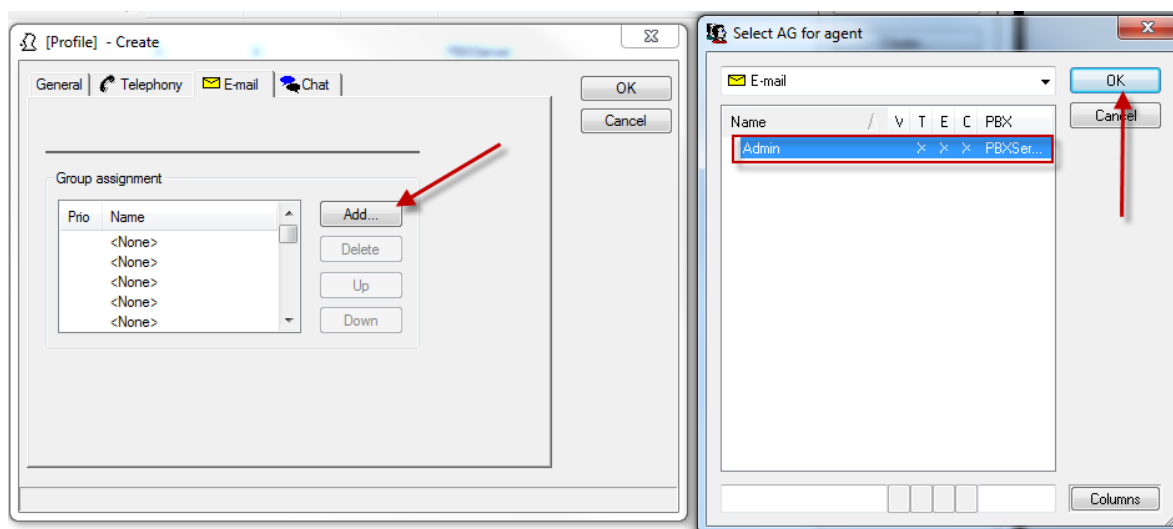
**After ( ) Seconds** – The period of time before the call is automatically answered is defined in seconds. The period of time can be between 0 and 255 seconds



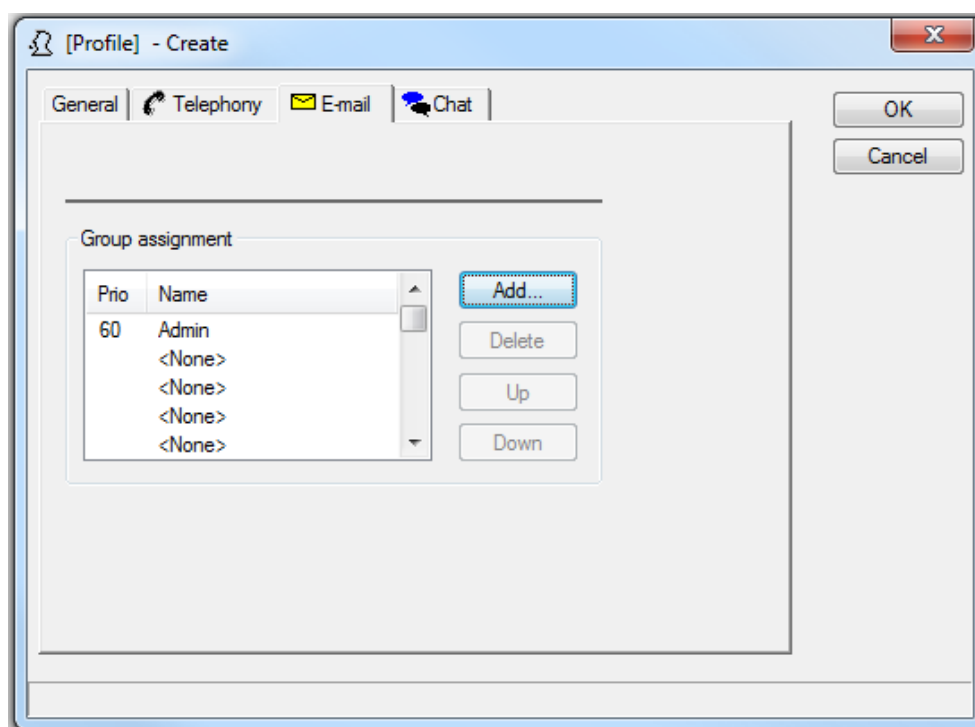
15. If the Profile has been assigned an **Email Task Type**, click the Email Tab.



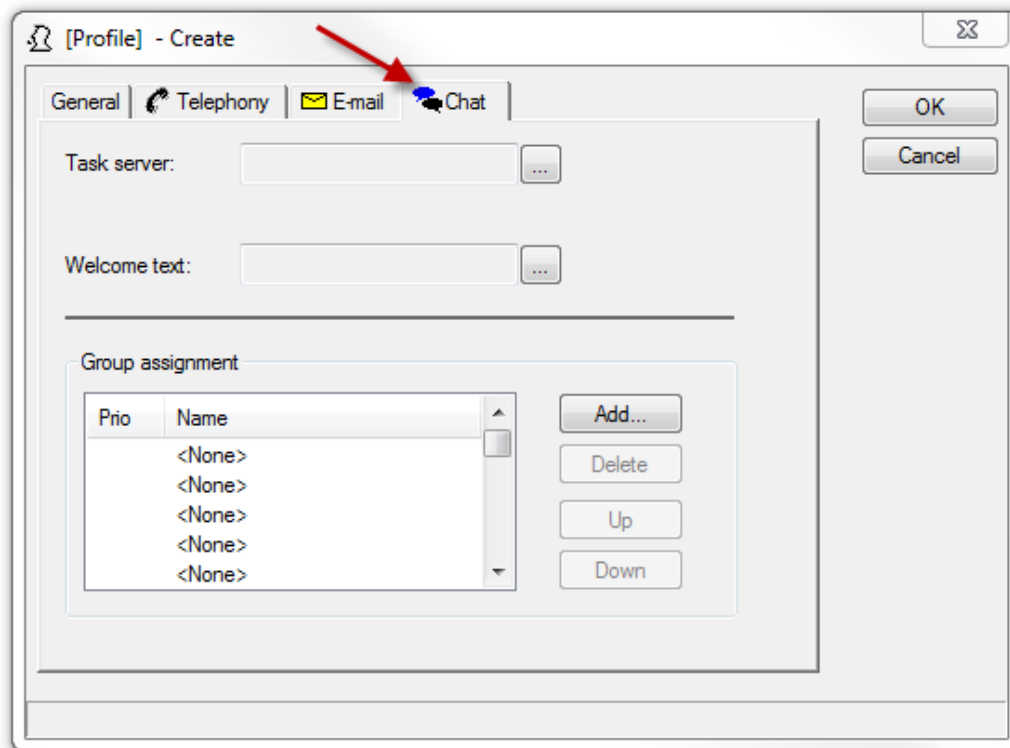
16. Click the **Add** button, and assign the required Agent Group to this profile. Once the Group has been selected, click the **OK** button.



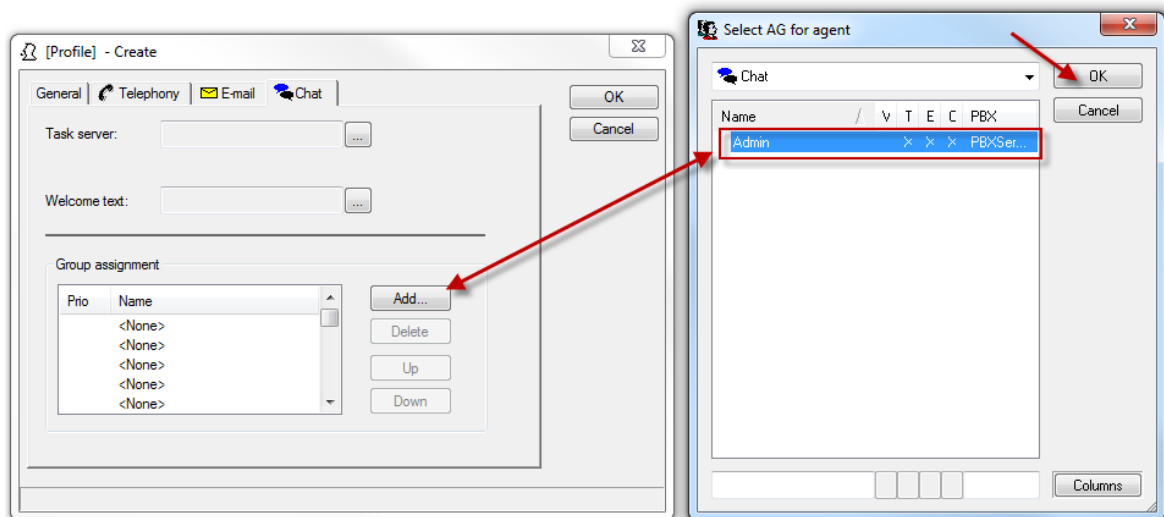
17. The assigned group is displayed. A priority can be assigned against any agent groups as described earlier.



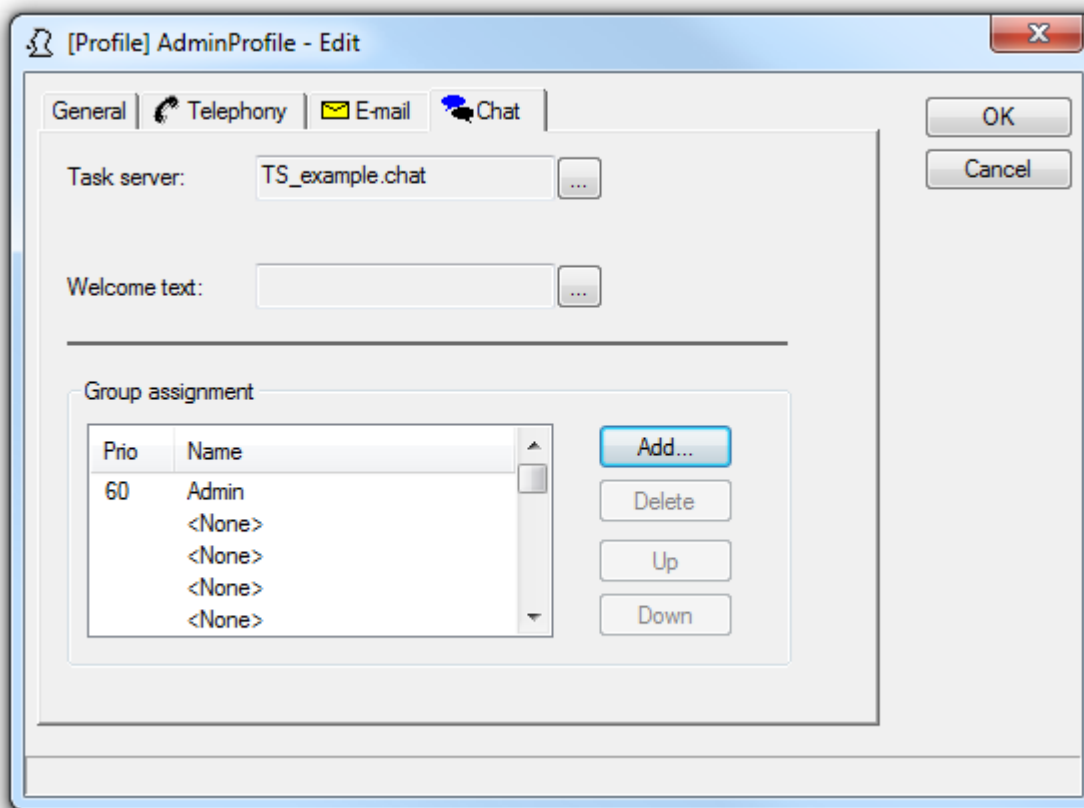
18. If the Profile has been assigned a **Chat** Task Type, click the **Chat** tab.



19. Click the **Add** button, and then select the Chat group to be assigned to this profile, then click the **OK** button.

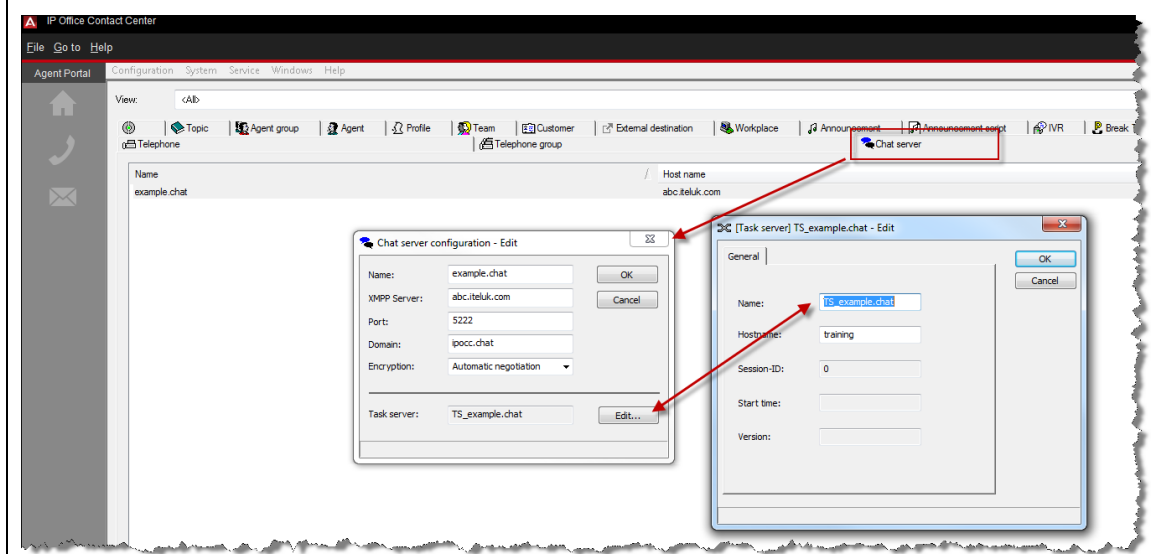


20. The assigned group is displayed. A priority can be assigned against any agent groups as described earlier.

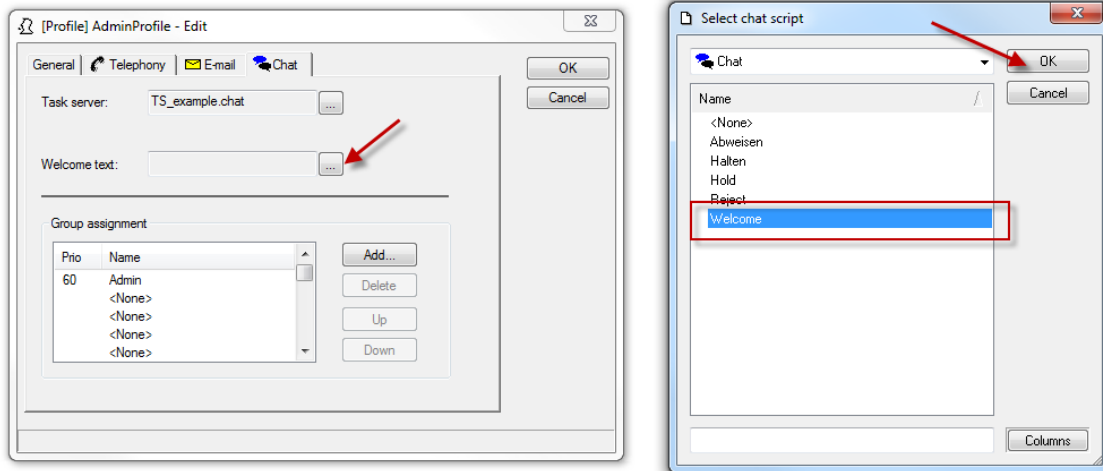


21. The Task Server field will automatically populate with the name of the Task Server.

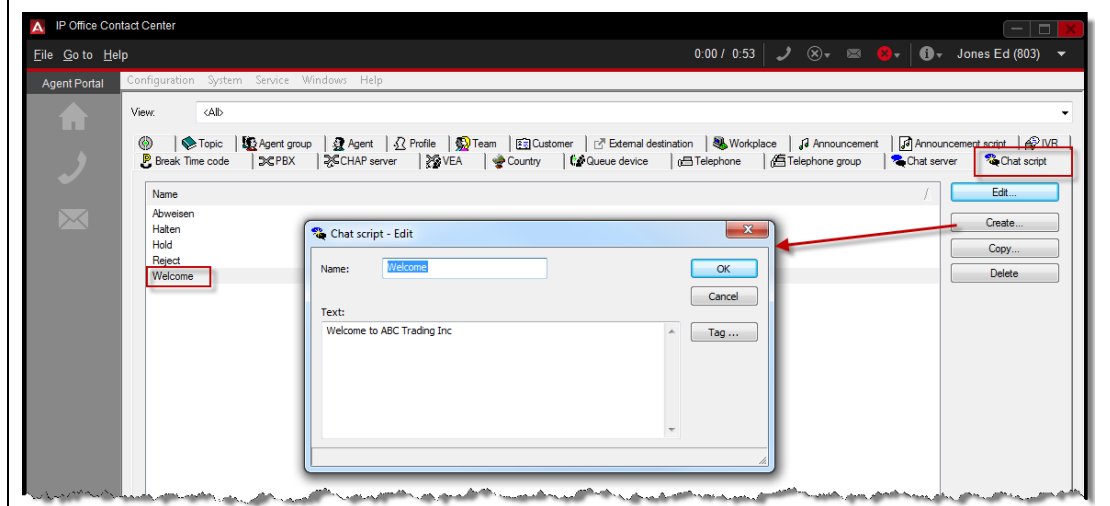
**Note:** For this to occur. The Chat Server must have previously been configured on the IP Office Contact Center server.



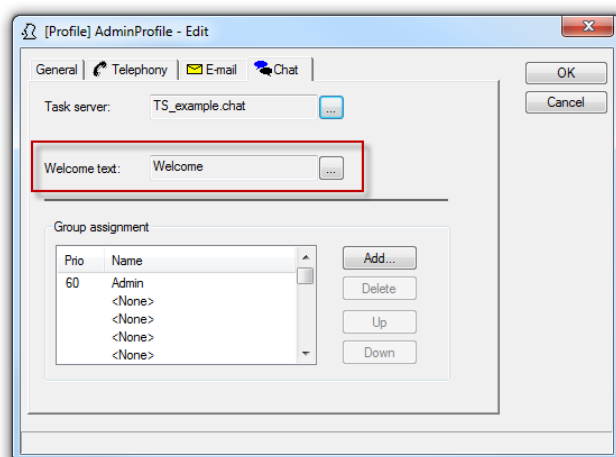
22.A Welcome Text can be added. Click the **Welcome Text** browser button, and then select the Welcome Text to be assigned to this profile. Then click the OK button.



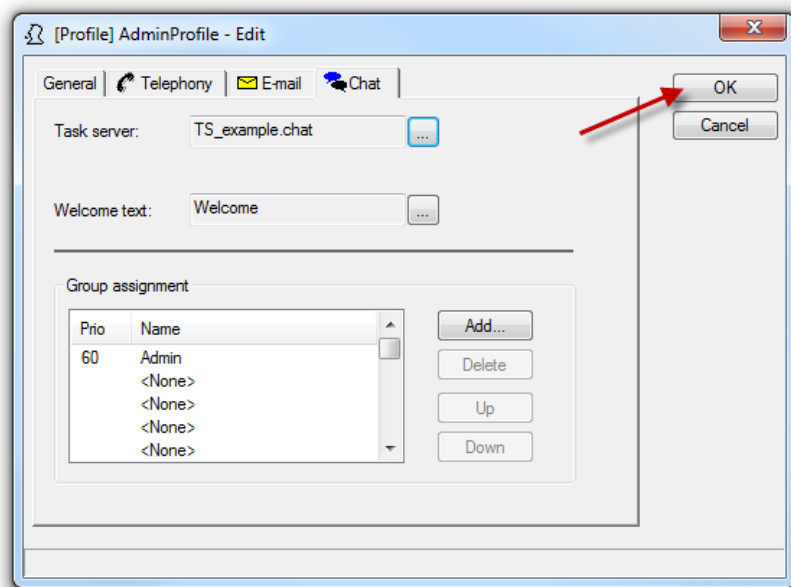
**Note:** For Welcome text to be available for selection, it must have previously been added to the IP Office Contact Center server.



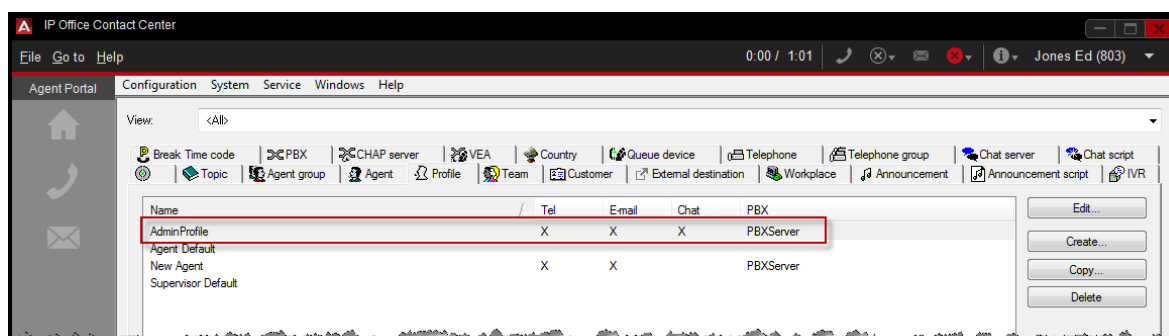
23.The selected **Welcome text** will be displayed.



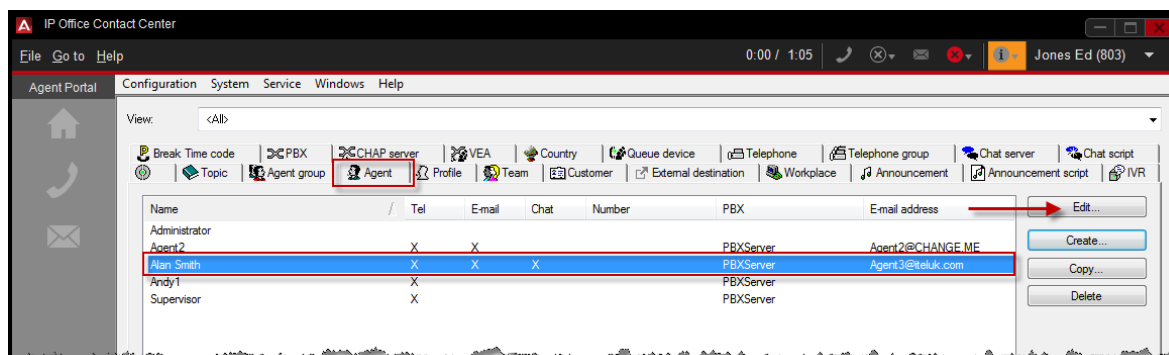
24. Click the **OK** button.



25. The new Profile will be displayed.



26. The Profile can also be assigned against individual agents. To assign the Profile to an agent, select the **Agent** tab, select the required agent and click the **Edit** button.



27. Click the **Predefined profile** browser button.



[Agent] Alan Smith - Edit

General | Telephony | E-mail | Chat

System name:  Task types  
☒ Telephony  
☒ E-mail  
☒ Chat

Login name:  Password...  
 2nd password...  
 Variables...  
 Skills...  
 Availability...

☐ Autom. sign on through Windows user account  
 Username:   
 Domain/computer:

Alias:   
 Language:

Last name:  Title  
☐ Ms.  
☐ Mr.  
 First name:   
 Employee ID:   
 Cost center:

Predefined profile:  ... Privileges...  
 Authorization...

Address book:

28. Select the required Profile and click the **OK** button.

Select agent profile

PBXServer

Name	T	E	C	PBX
✓ <None>				
AdminProfile	x	x	x	PBXServer
New Agent	x	x		PBXServer

OK  
Cancel

Columns

29. The assigned Profile will be displayed.

The screenshot shows the 'Edit' dialog for agent Alan Smith. The 'Predefined profile' field is highlighted with a red box and contains the value 'AdminProfile'. Other fields include System name (Alan Smith), Login name (Agent3), Task types (Telephony, E-mail, Chat), Username, Domain/computer, Alias, Language, Last name (Smith), First name (Alan), Employee ID (3), Cost center, Title (Ms./Mr.), Password, 2nd password, Variables, Skills, Availability, Privileges, Authorization, and Address book (Standard).

30. Any assigned agents are also displayed, within the created profile.

The screenshot shows the IP Office Contact Center Agent Portal. The 'AdminProfile' profile is selected, and the 'Used for' field in the profile edit dialog is highlighted with a red box and contains the value 'Agent Alan Smith'. The profile table shows the following data:

Name	Tel	E-mail	Chat	PBX
AdminProfile	X	X	X	PBXServer
Agent Default				
New Agent	X	X		PBXServer
Supervisor Default				

## Configuring User Interface Views

One of the major benefits of the IP Office Contact Center User Interface is its flexibility in allowing administrators to create profiles and specific interfaces relating for example, to the Telephony View and Home View.

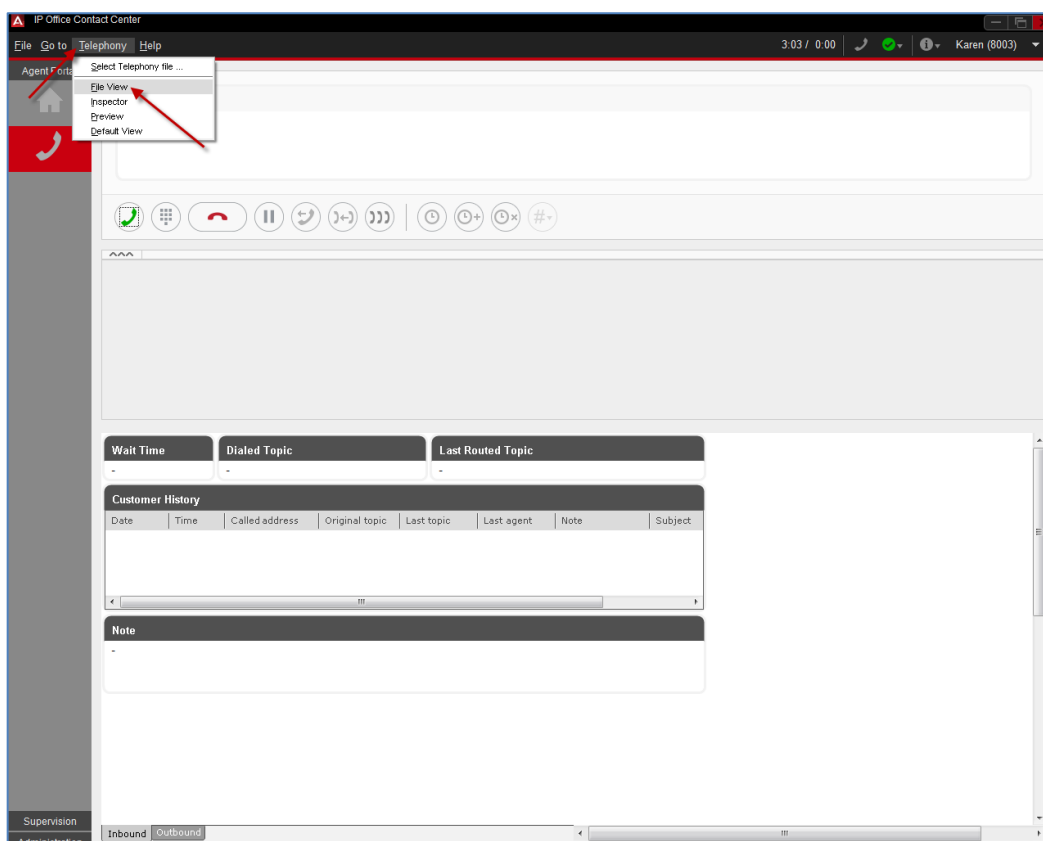
**Note:** For a user to change for example their Telephony view, they will require the necessary UI privileges. Please refer to the **Privileges and Authorization** section of this guide.

Once the required privileges have been assigned, the User Interface can be edited.

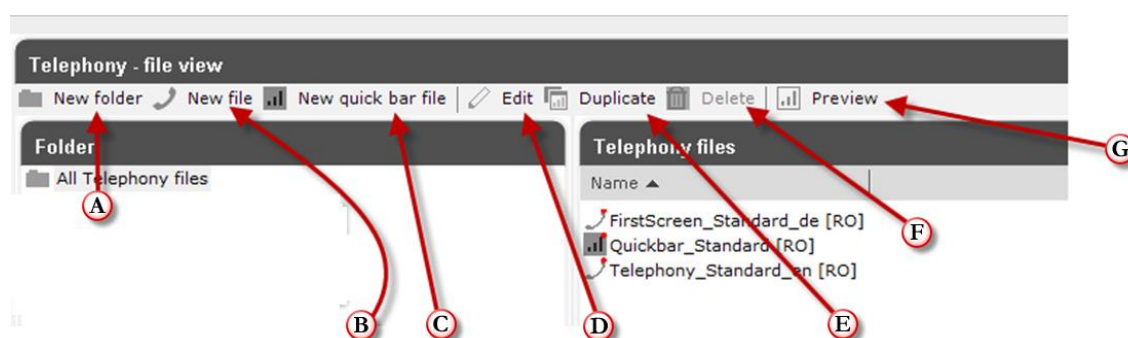
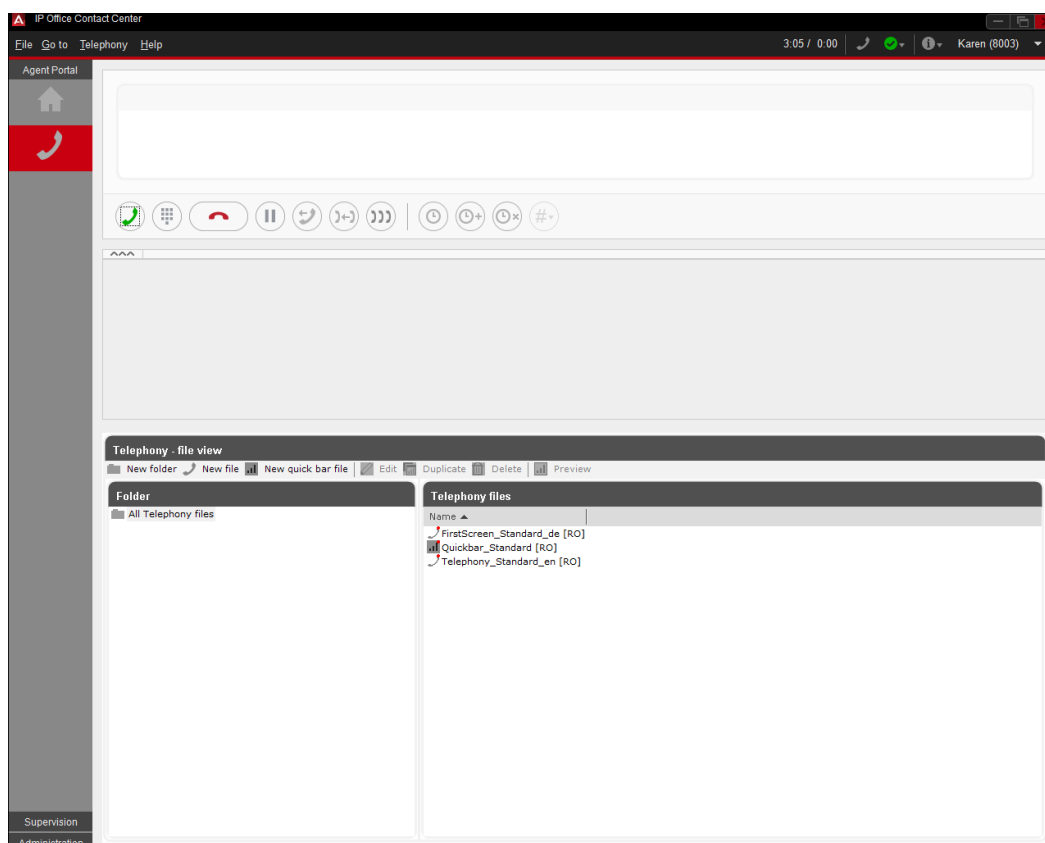
### Creating a Duplicated File to be Edited

In the following examples, the Telephony View will be edited from a duplicated file.

1. From the **Telephony View**, select the **Telephony** menu followed by **File View**. The **File View** is used to select the real time information files to be edited.



2. The **File View** is displayed.

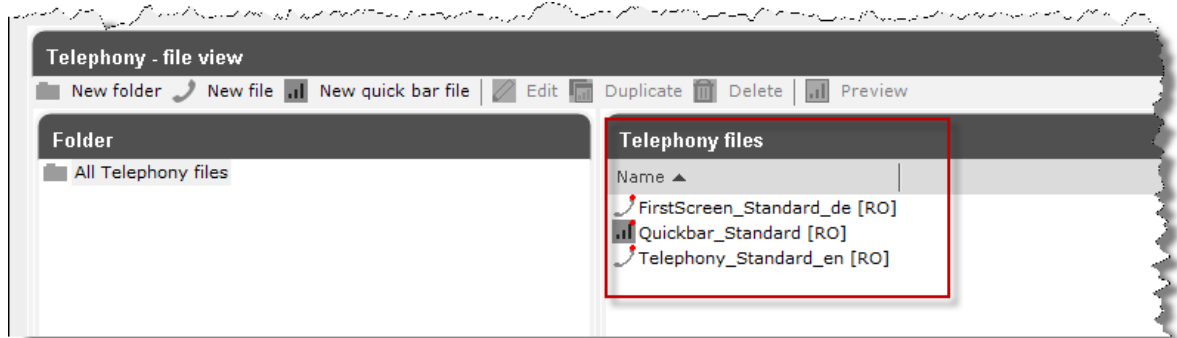


- A. New Folder – Click to create a new folder to store additional files
- B. New File – Click to create a new Telephony File
- C. New Quick Bar File – Click to create a new Quick Bar File
- D. Edit – Click to edit the Telephony File
- E. Duplicate – Click to duplicate a selected Telephony File
- F. Delete – Click to delete a selected Folder or Telephony File
- G. Preview – Click to preview changes to the Telephony File

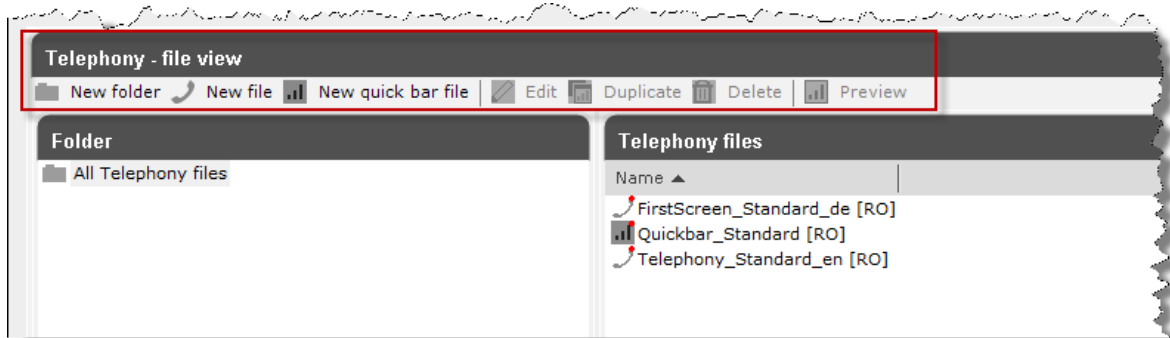
Other views include:

- Telephony Inspector – To edit Real Time telephony information
- Preview – To preview changes made to a duplicated Telephony File.
- Default View – Displays the Telephony Real Time information assigned to the agent as their default view.

- The default files are displayed relating to the main Telephony View and Quickbar.

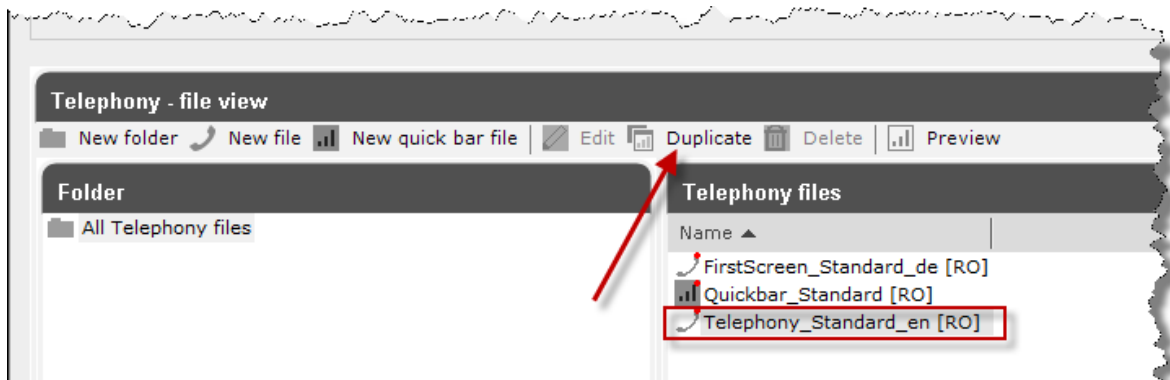


- A new folder can be created to store files, or files can be created, duplicated, deleted or previewed.

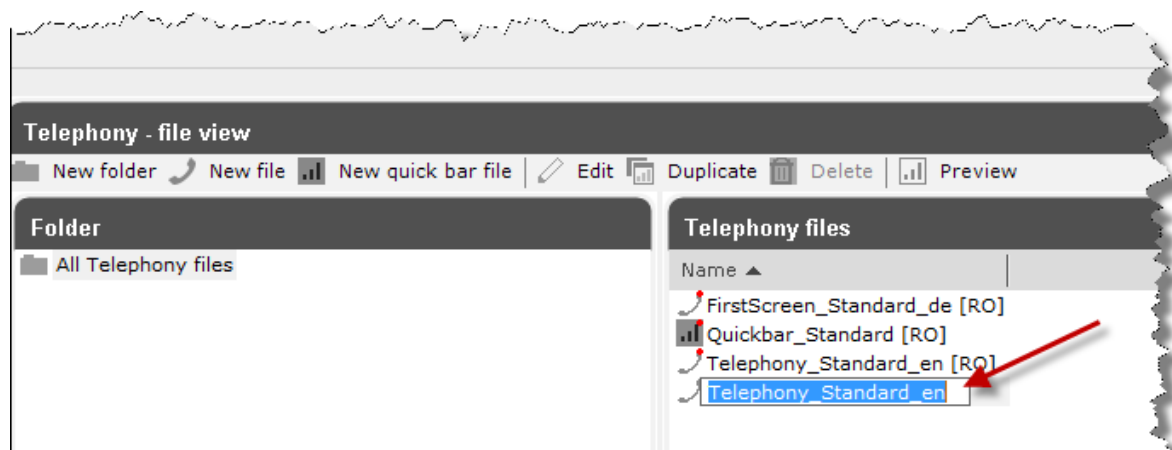


**Note:** The existing default Telephony\_Standard or Quickbar\_Standard files cannot be overwritten. To edit the interface, you must make a duplicate of the file from which changes can be made.

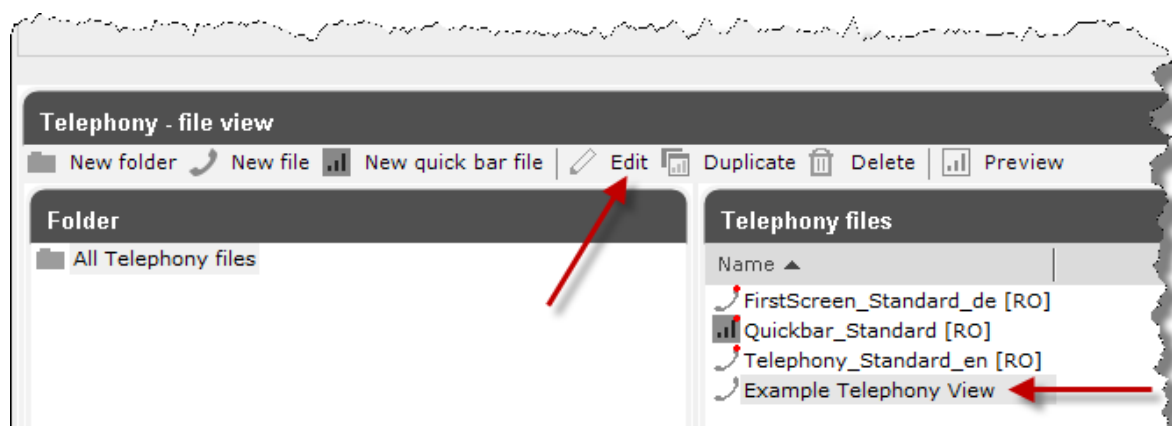
- To create a duplication of an existing file, select the required file and click the **Duplicate** button.



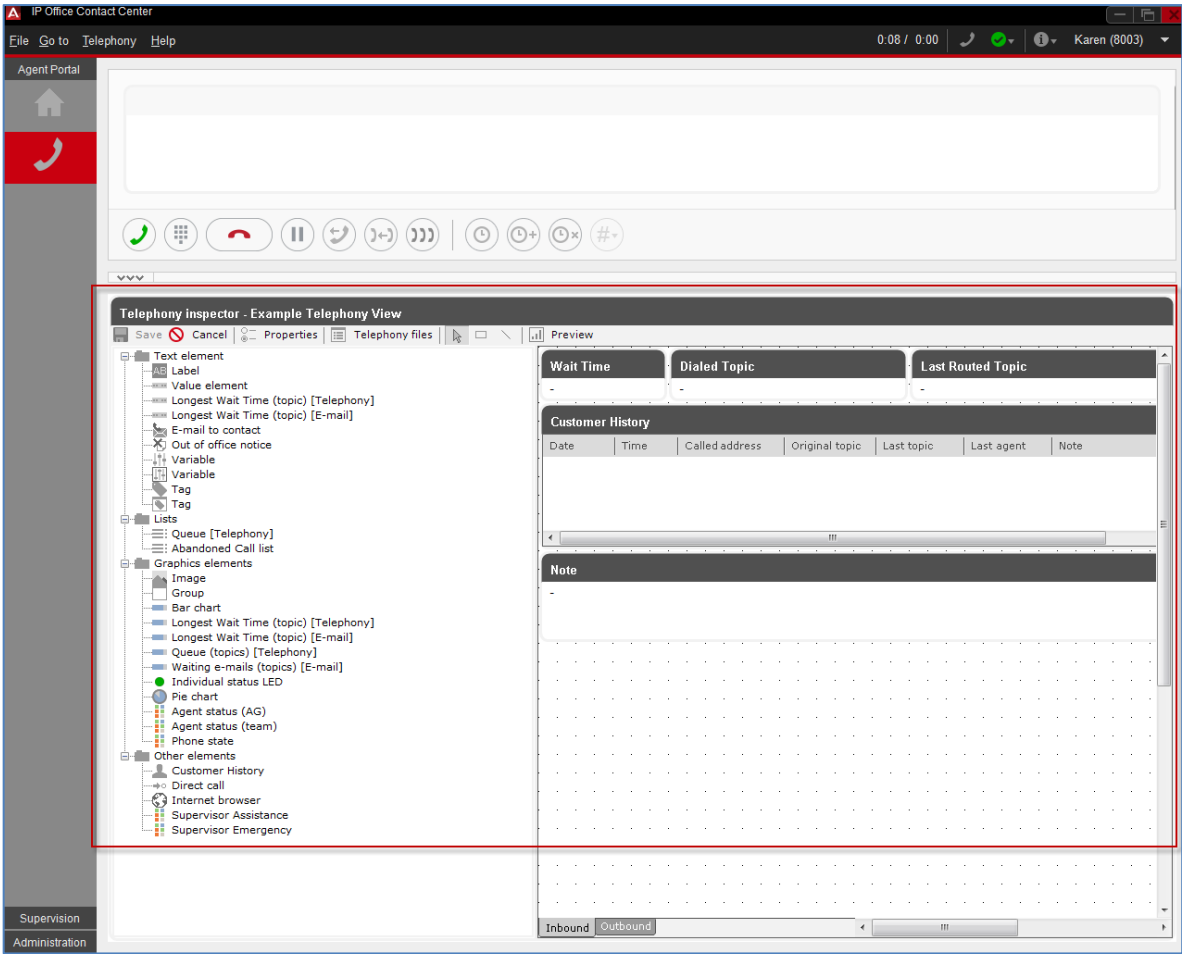
- The duplicated file is displayed and can be renamed as required.



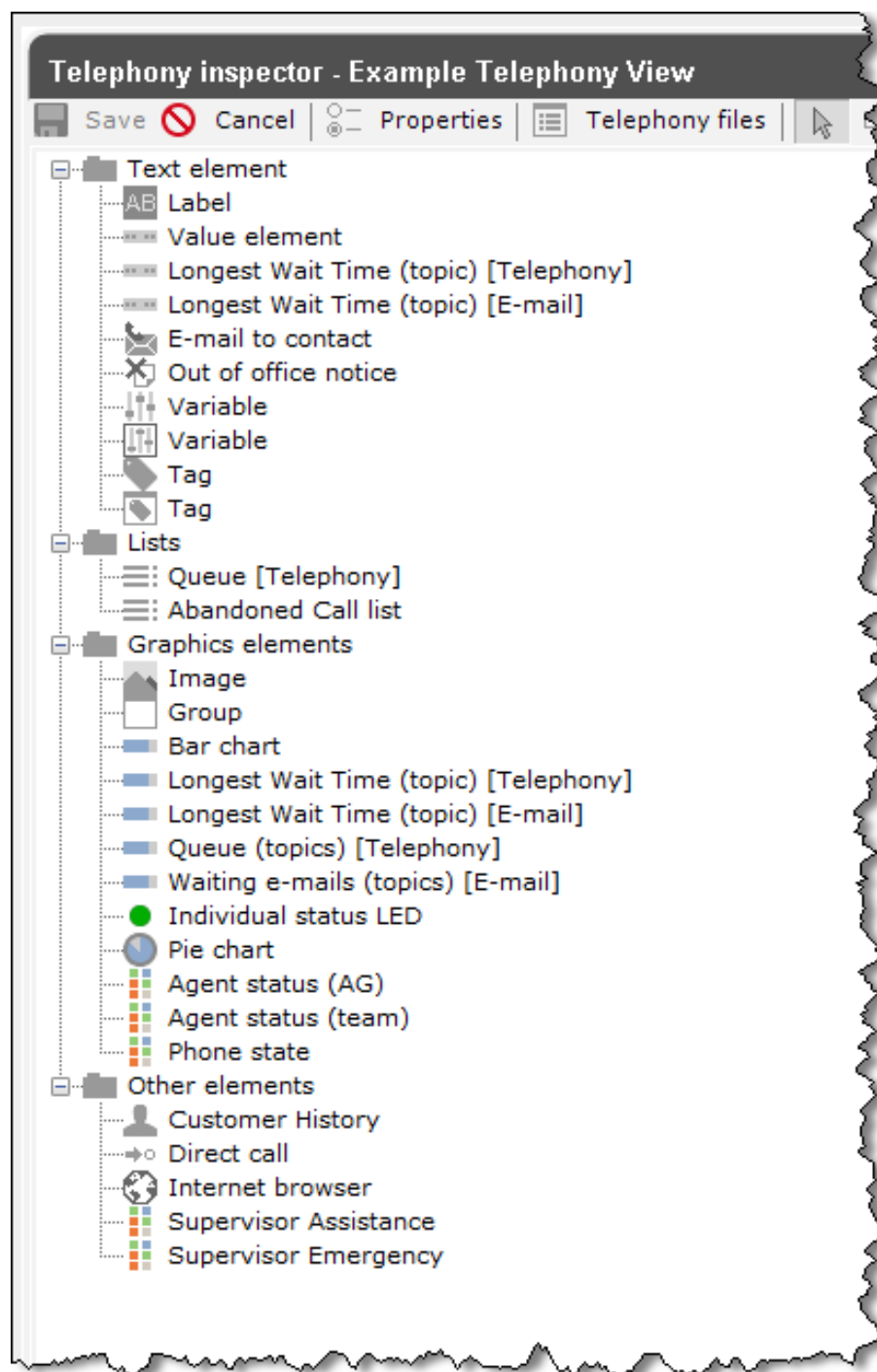
7. To edit the file, select the file and click the **Edit** button.



8. The **Telephony Inspector** is displayed.

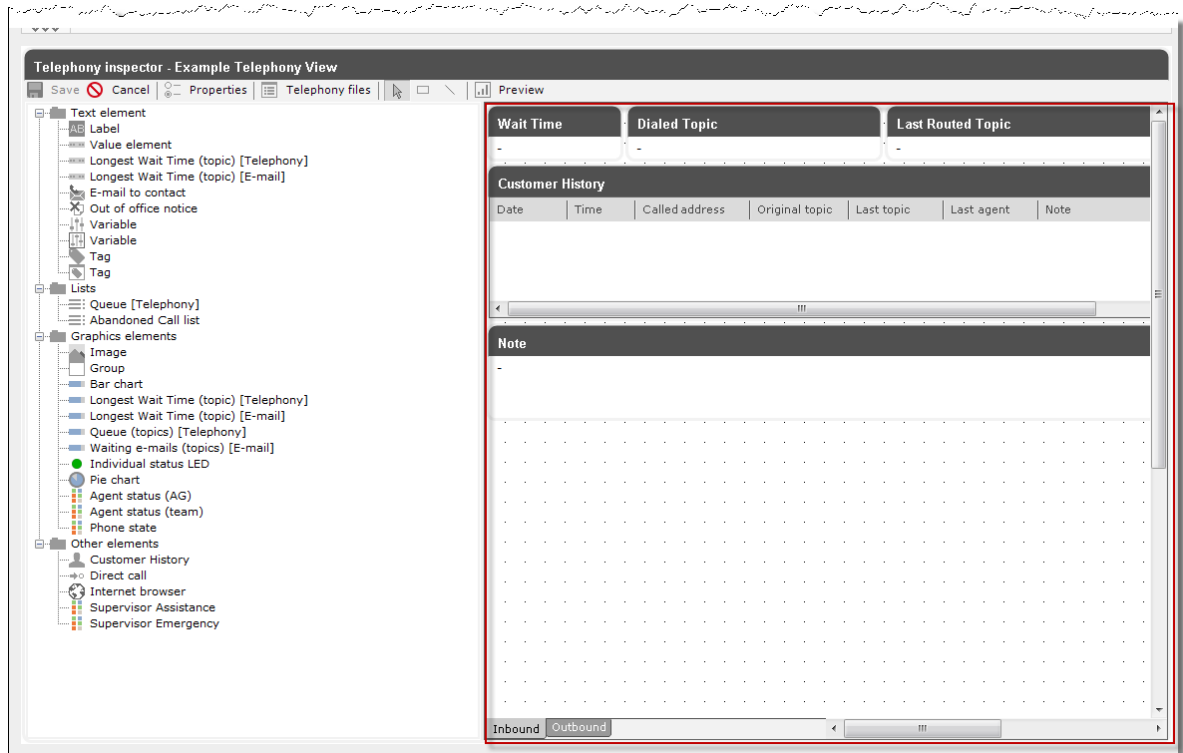


9. The Elements available for selection are displayed on the left of the screen. These are broken down as:
- Text Element
  - Lists
  - Graphics Elements
  - Other Elements.

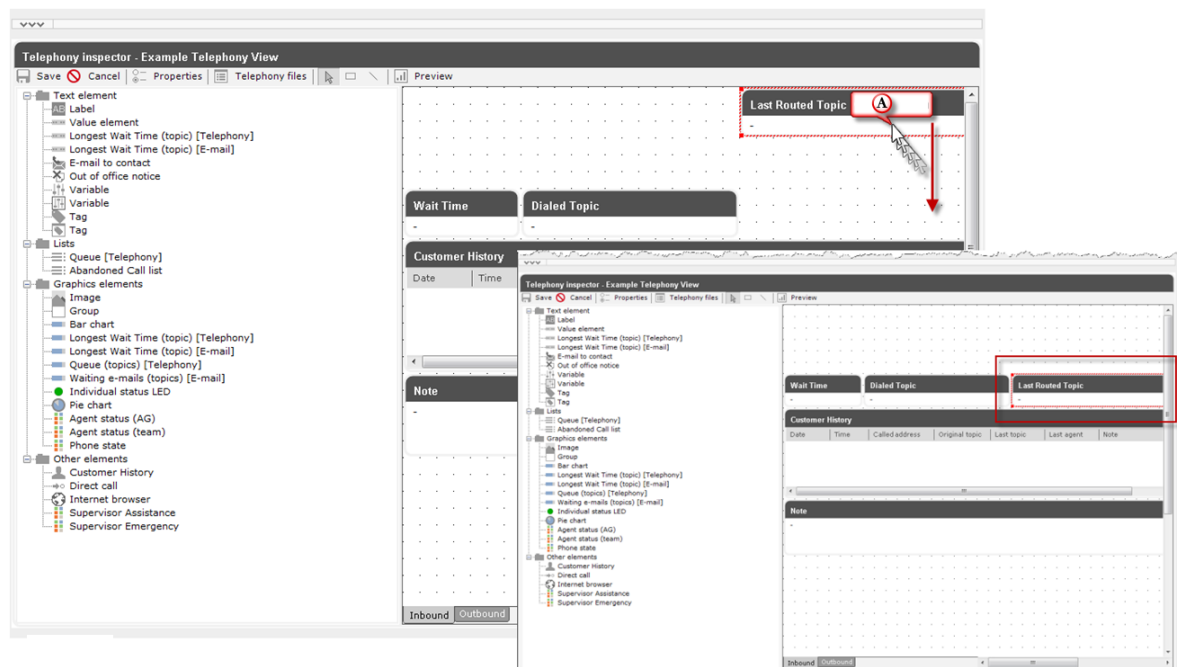




10. The required Elements can be placed onto either the Inbound or Outbound Working Area screens.

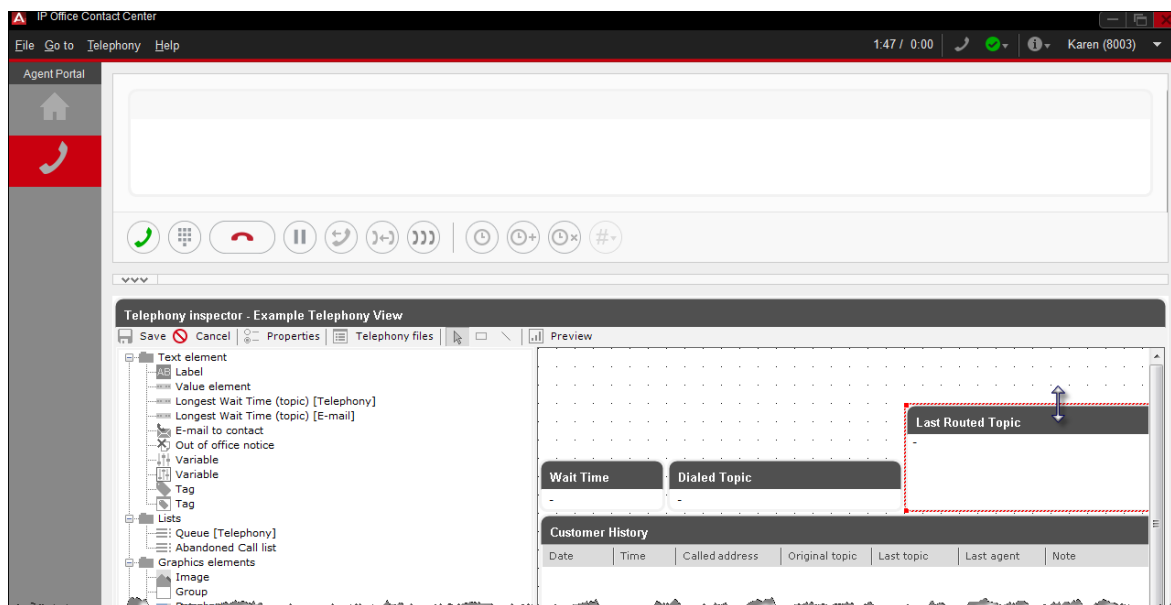


11. Individual Elements can be repositioned on the working area by selecting the element and dragging it to the required position.

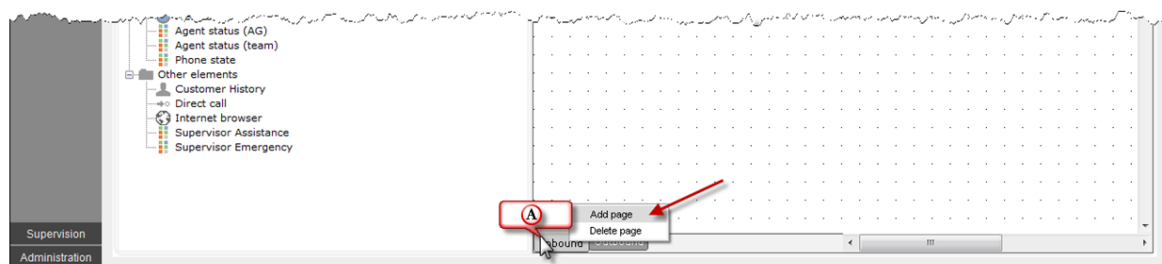


A. Click and drag.

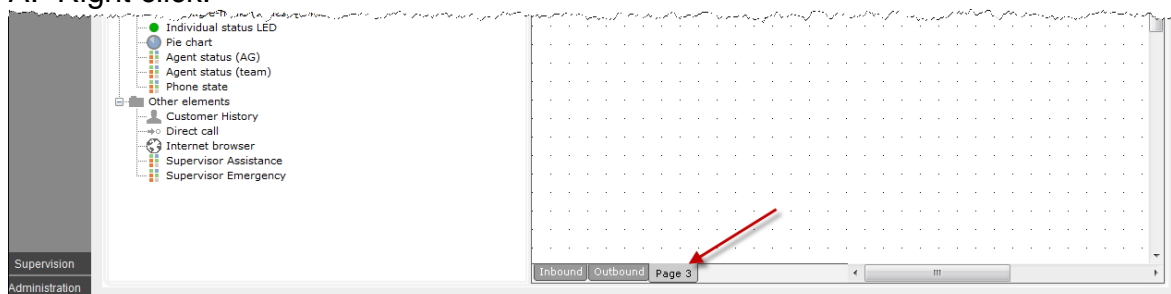
12. Elements can also be resized.



13. Additional Pages can be added as required, by right clicking on the tab and selecting **Add Page**.



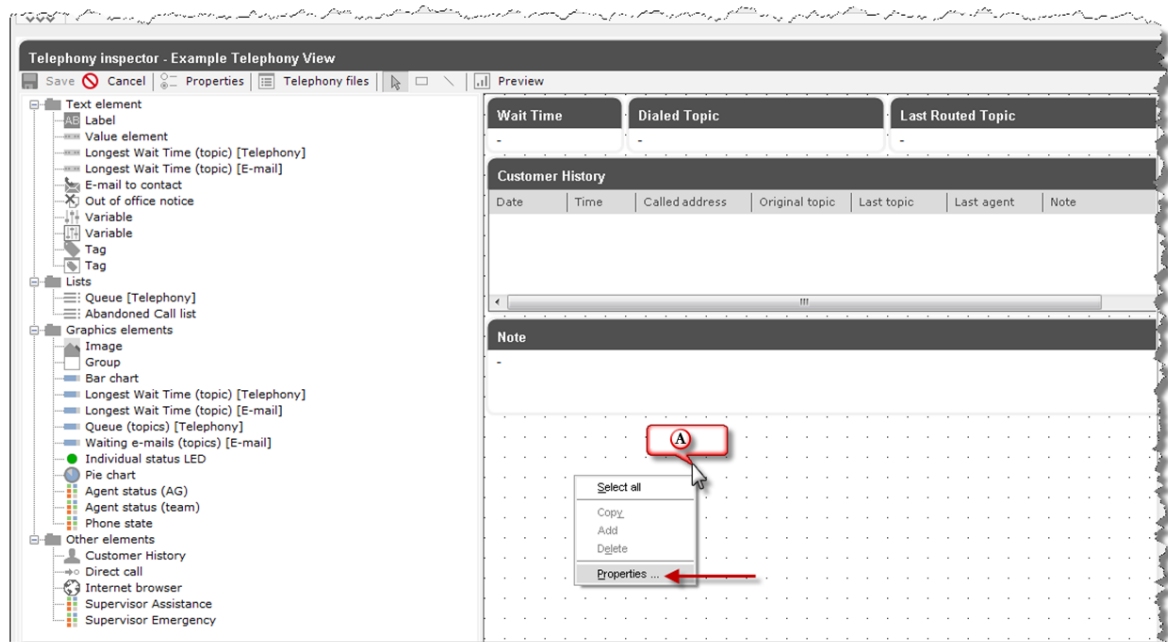
A. Right click.



## Setting the Working Area's Screen Size and Settings

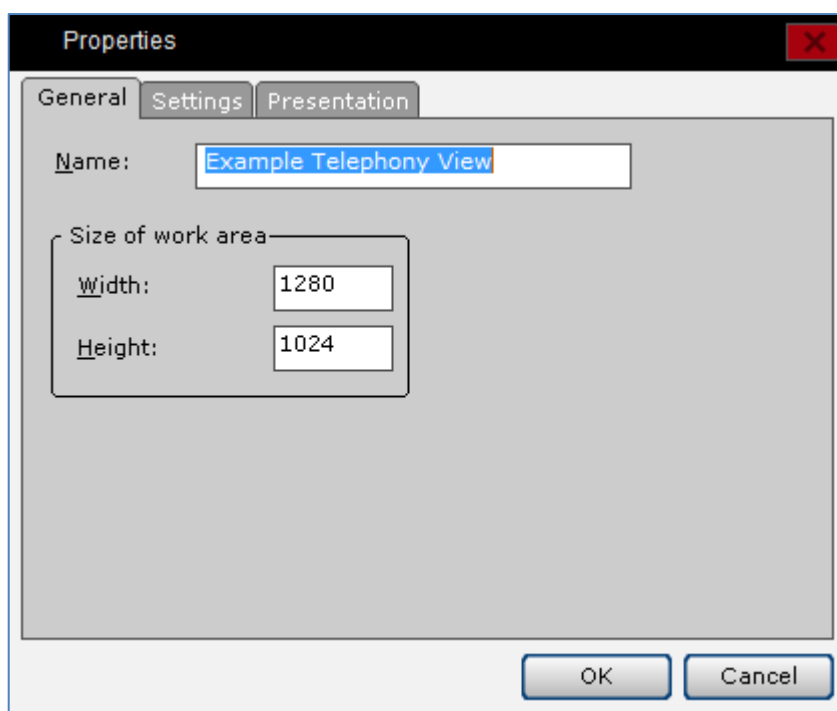
It is recommended that the size of the Working Area be configured to match the required resolution of the Agents PC monitor, upon which the User Interface will be displayed.

1. To set the resolution, right click on the **Working Area** and select **Properties**.

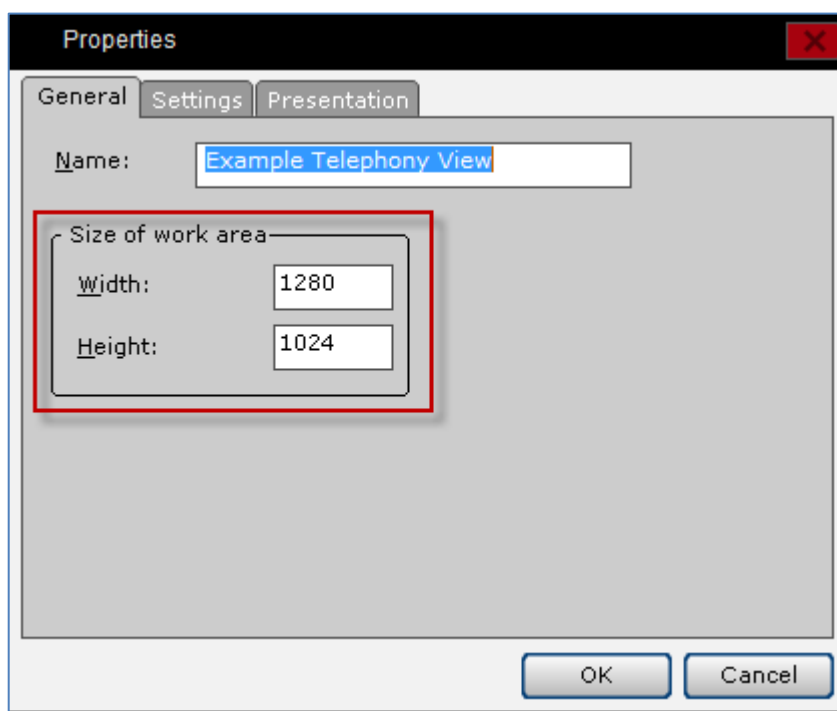


A. Right click.

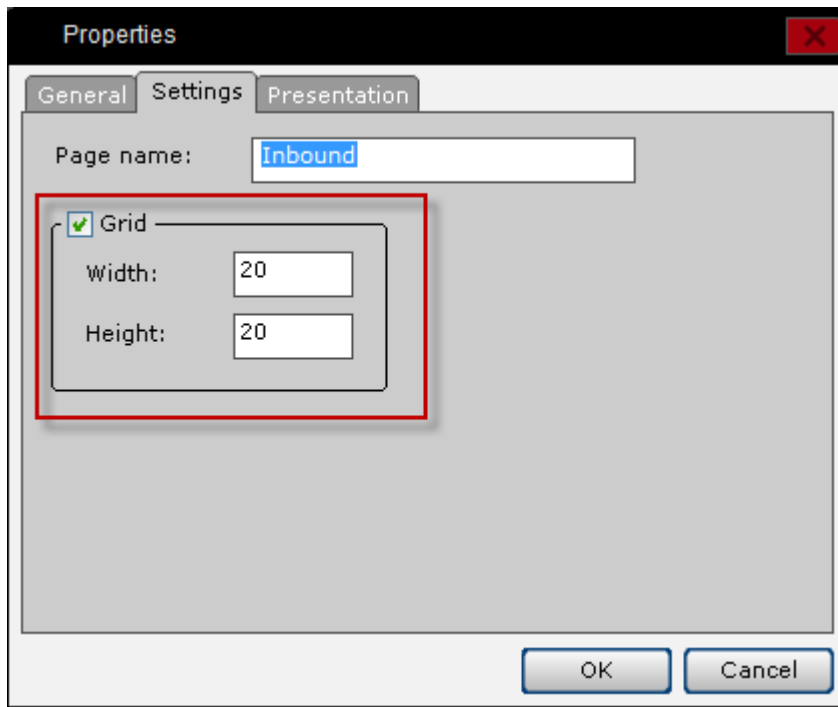
2. The **Properties** screen is displayed.



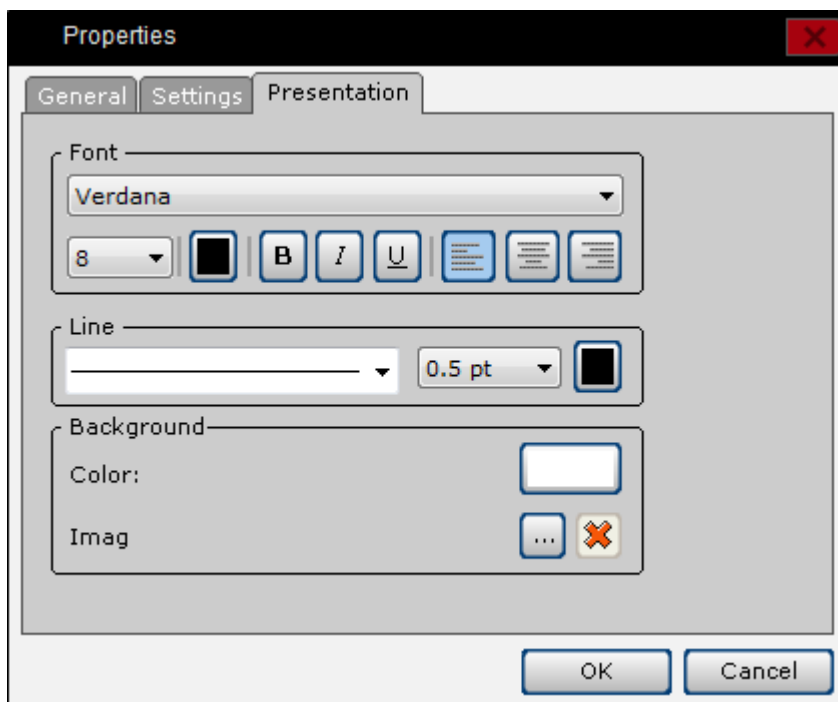
3. The Width and Height of the working area can be defined to match the resolution settings of the Agents PC.



4. From the **Settings** tab, the grid lines can be removed or their display size amended.



- From the **Presentation** tab, the font, background color and line width and color of the Working Area can be changed as required.

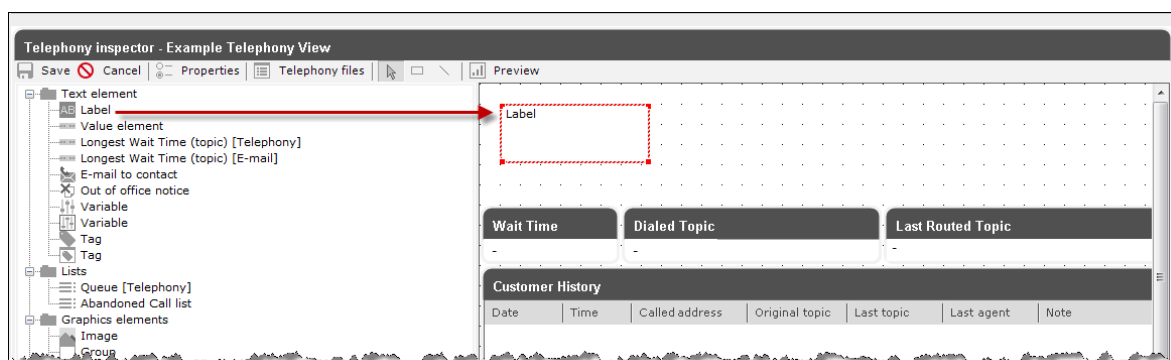


- When the settings have been configured, click the **OK** button.

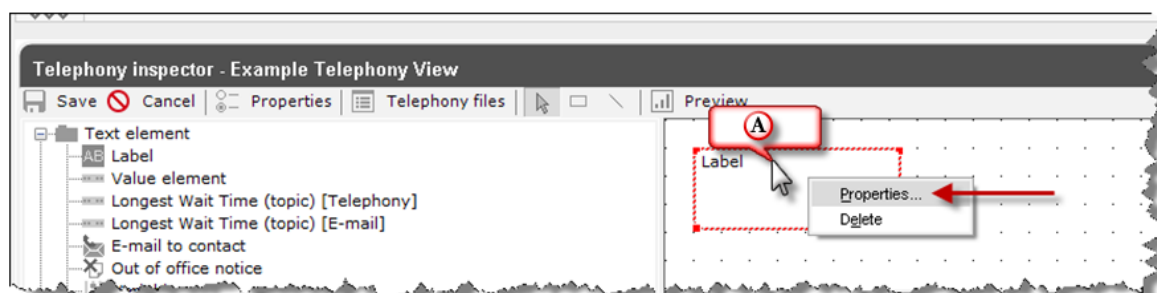
## Adding Elements to the Working Area

### Text Elements

1. To add an Element to the Working Area, select the Element and drag it to the required position of the Working Area. In the example below, a Label Element has been selected and positioned as required.

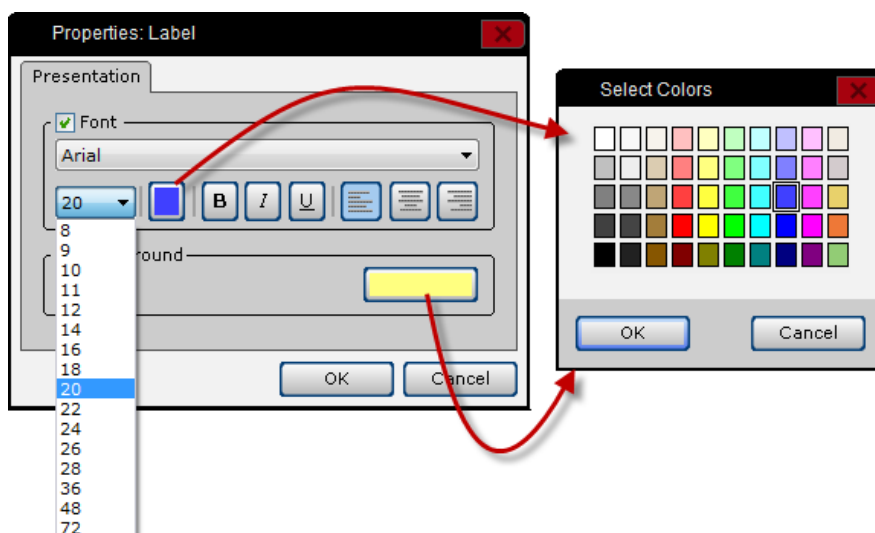


2. The properties of the Label Element can be configured by selecting the Element, then right clicking and selecting **Properties**.

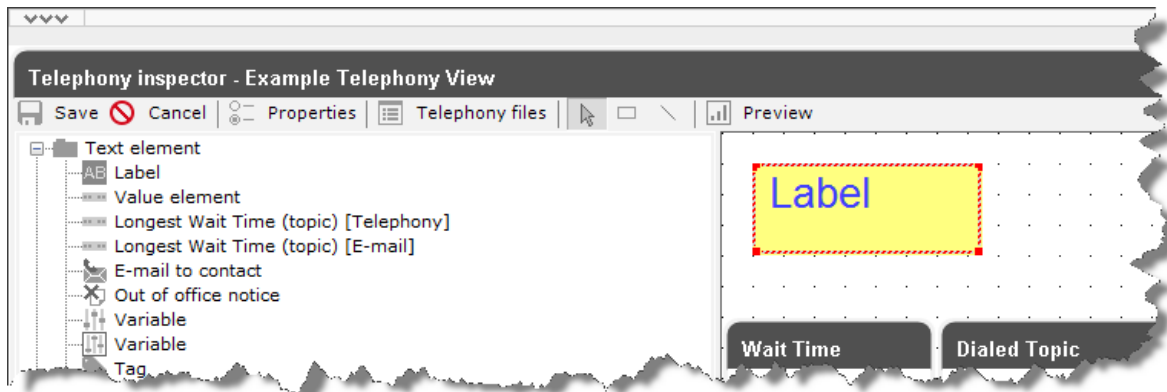


A. Right click.

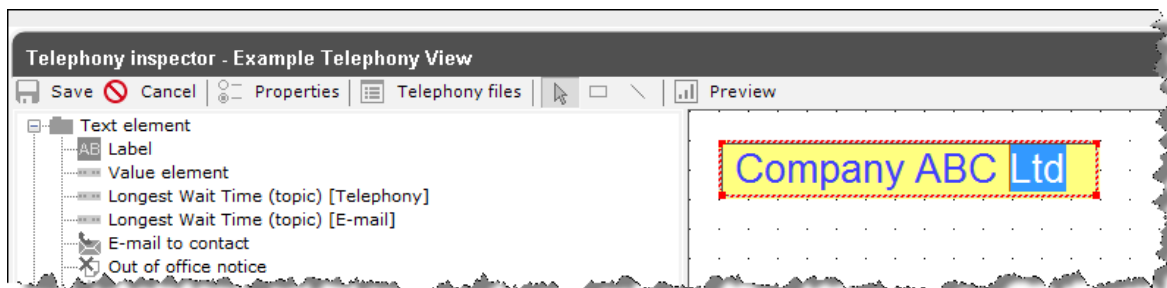
3. The background color, font size and color of the Element can be configured as required.



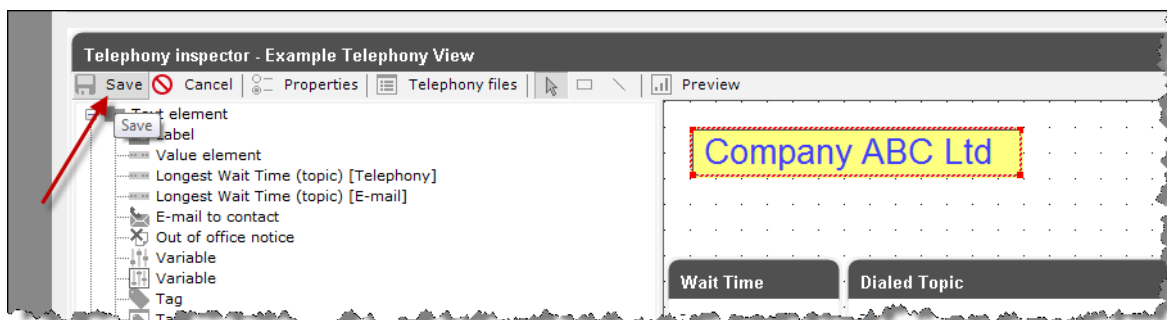
4. Once configured, click the **OK** button.
5. The changed Element is displayed.



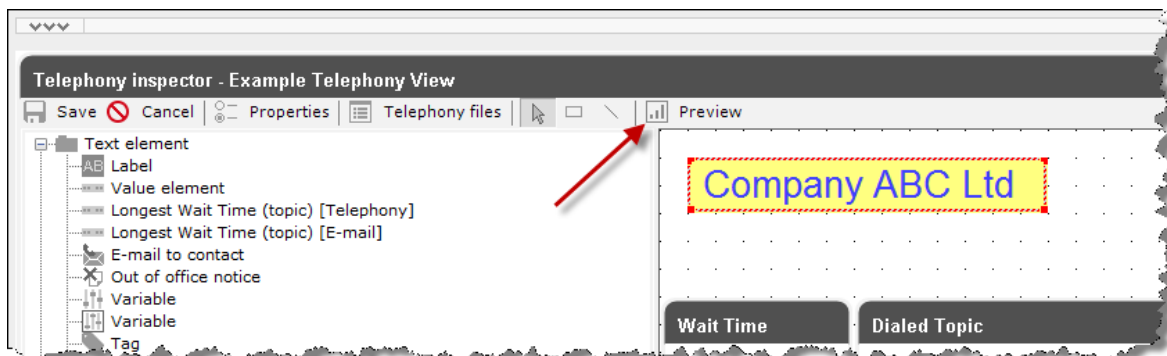
6. To change the text of the Label, highlight the text and enter the new text.



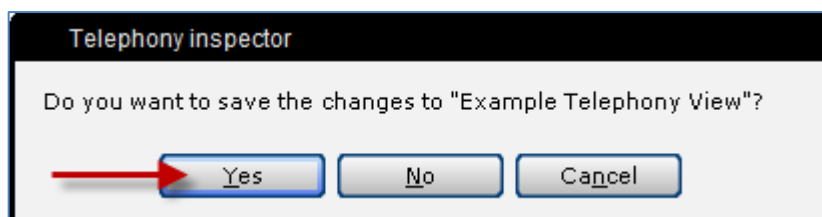
7. Save the changes.



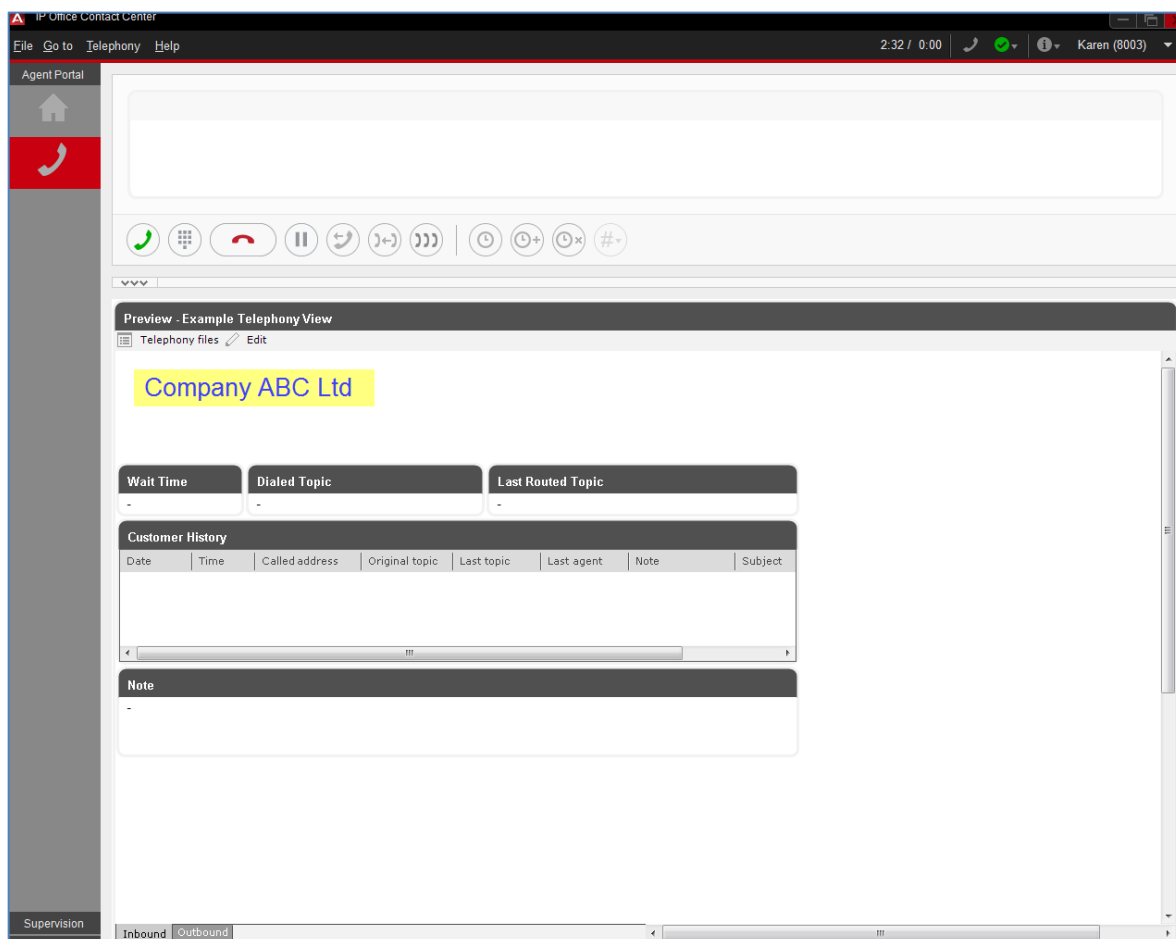
8. The changes can be previewed, by selecting the **Preview** button.



9. A prompt is displayed requesting confirmation of the changes. Click **Yes**.



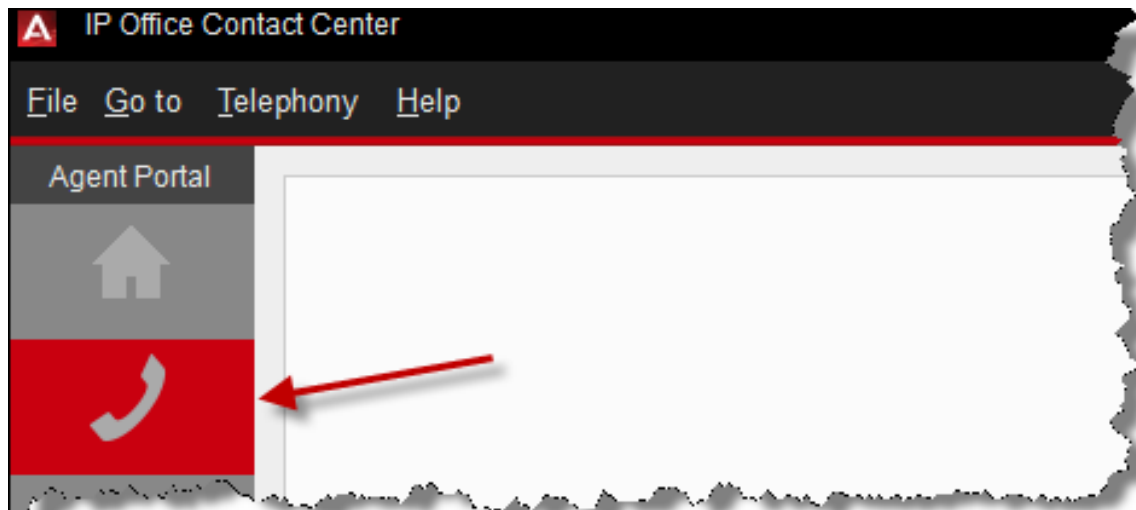
10. The preview of the new Working Area is displayed.



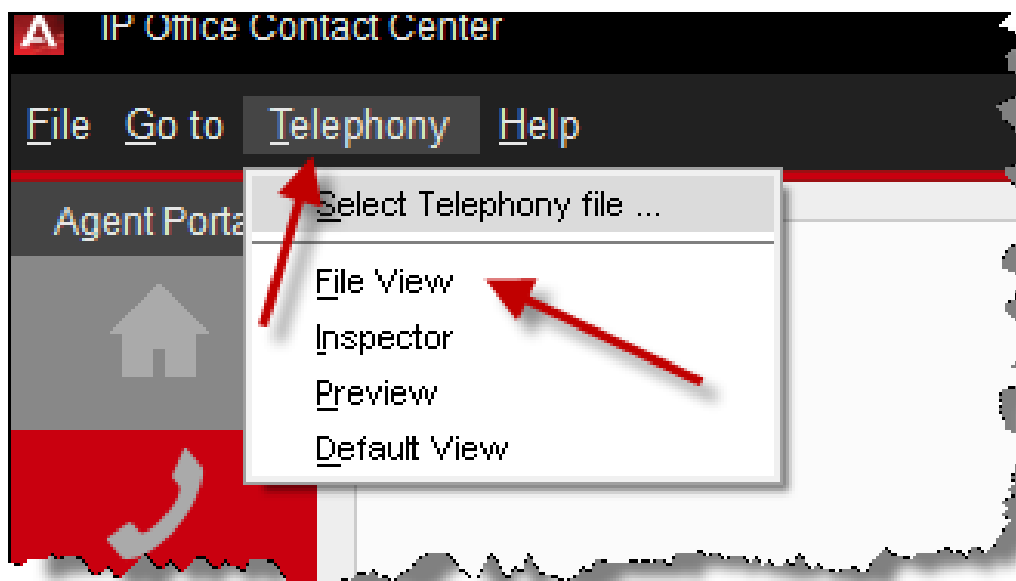


## Selecting the File to Be Used in the Telephony View

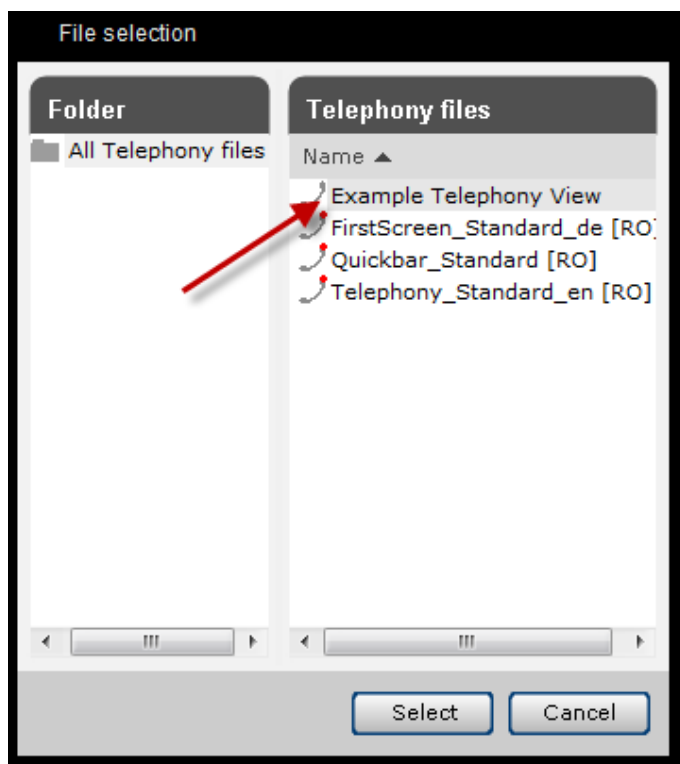
Once you have previewed the file and you are satisfied with its layout, you can select the file so it can be displayed when the Telephony View is accessed by the agent.



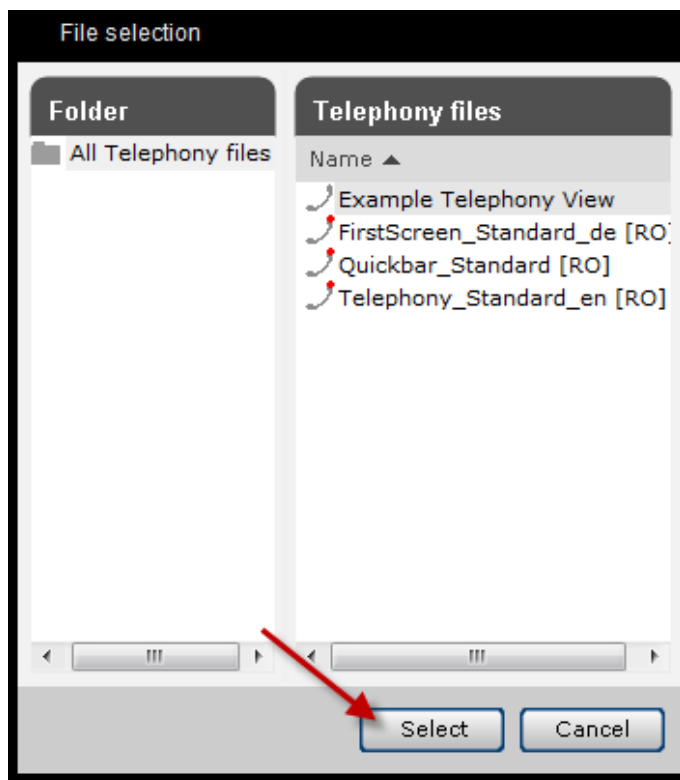
1. To select the file to be used, click **Telephony** and click **Select Telephony file**.



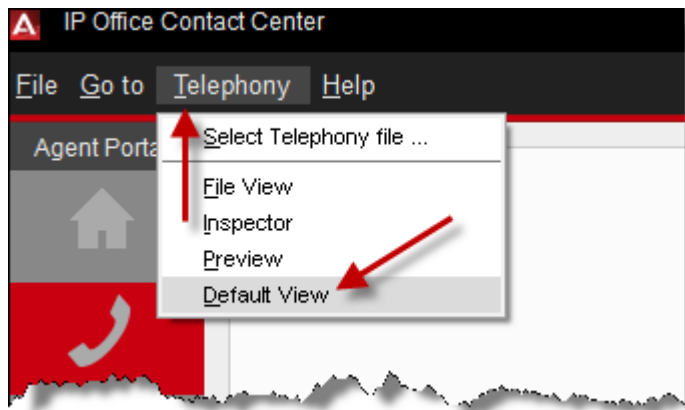
2. Select the file as required. In this example, the duplicated file that was previously created and edited has been selected.



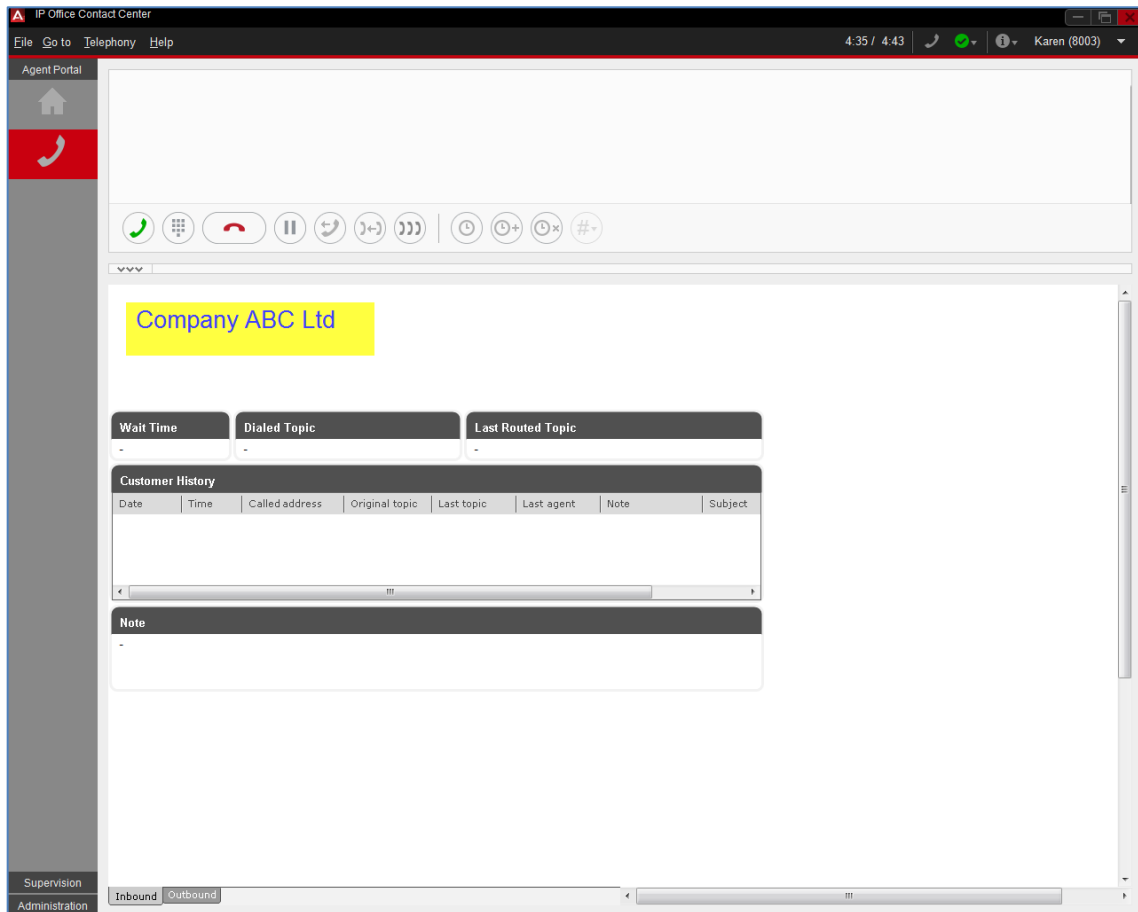
3. Click the **Select** button.



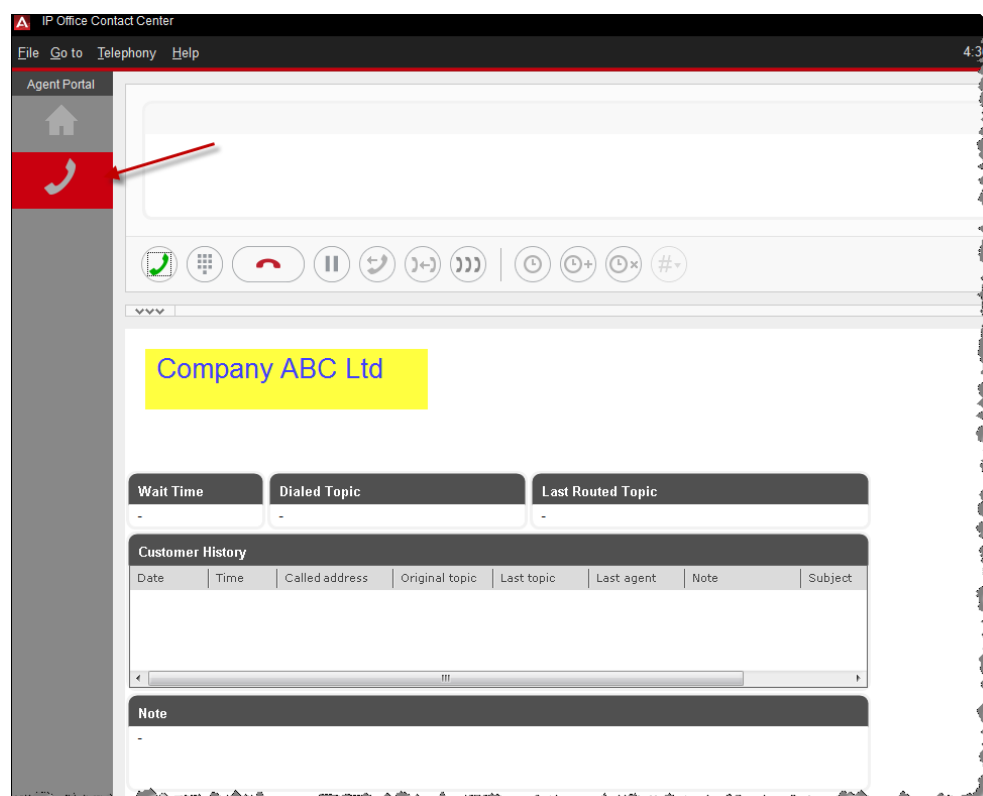
4. Click **Telephony**, then click **Default View**.



5. The selected file is displayed as the Telephony View.



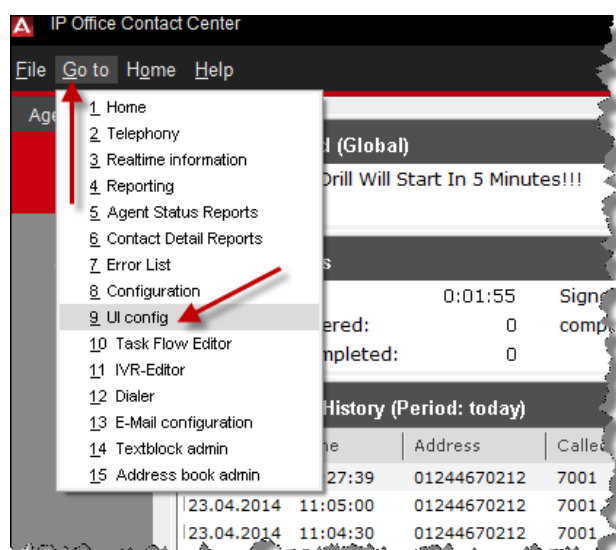
6. When the agent clicks the **Telephony View** icon, the selected view will be displayed.



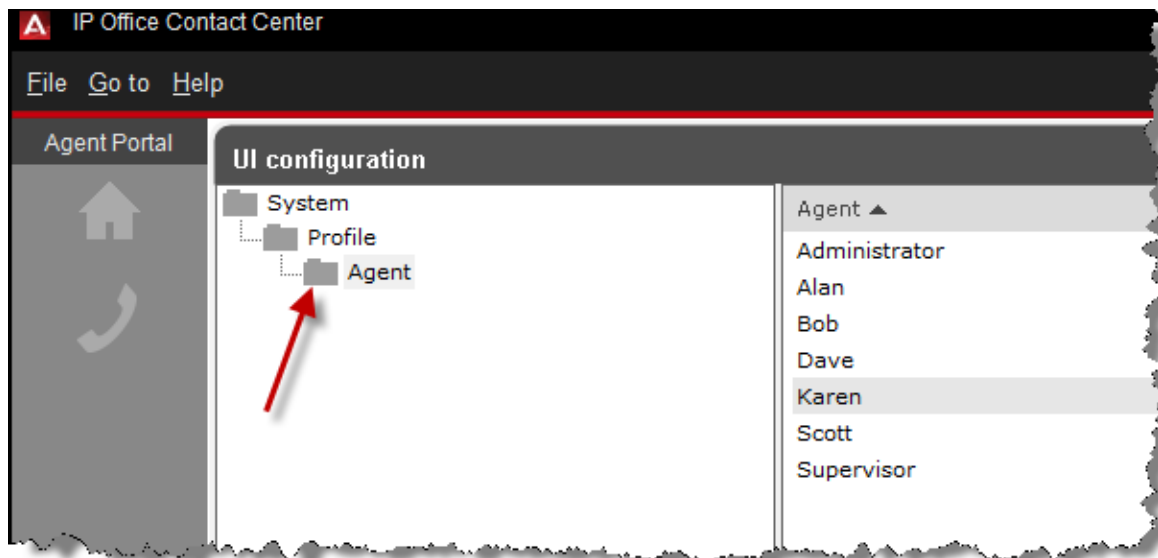
## Setting the Default View displayed after an Agent Logs into the User Interface

It is recommended that the Telephony agents User interface is configured to open by default to **Telephony View**.

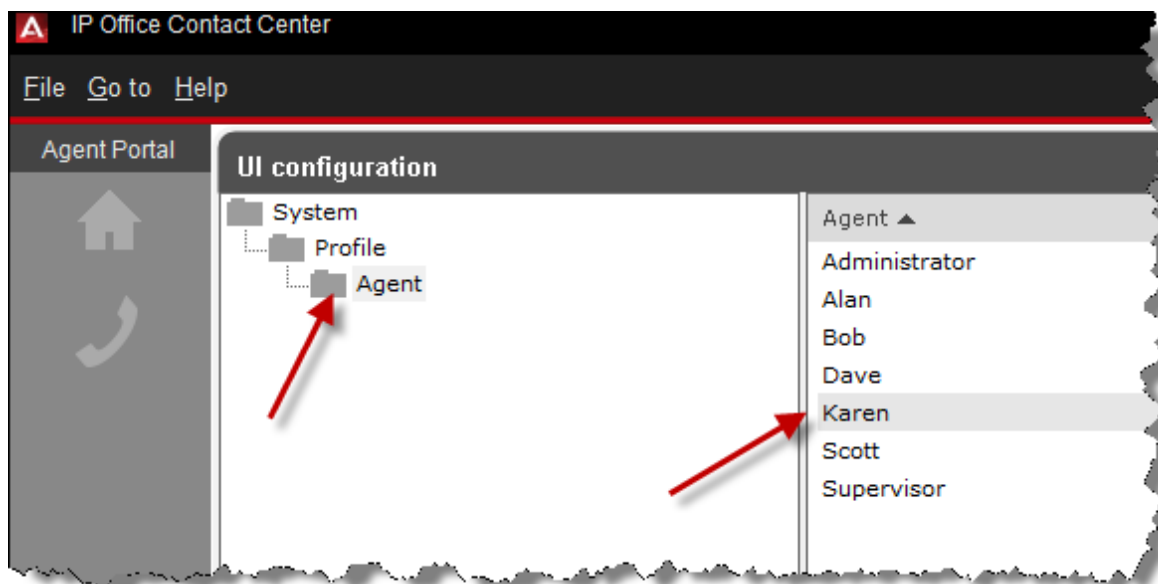
1. Select **Go to** followed by **UI Config**



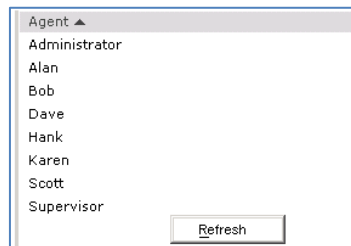
2. Double click on the required profile. To select an individual agent, double click on the **Agent** and select the agents name as required.



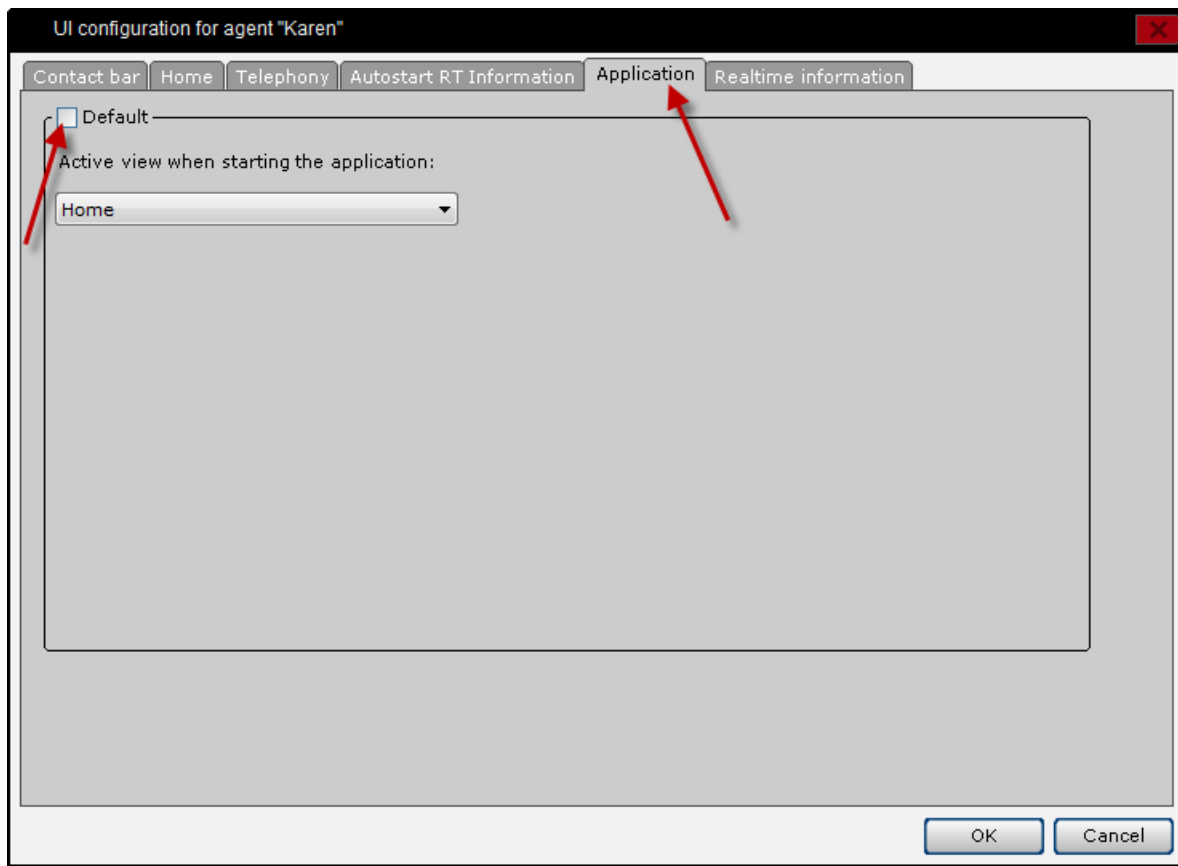
3. In this example Agent Karen has been selected.



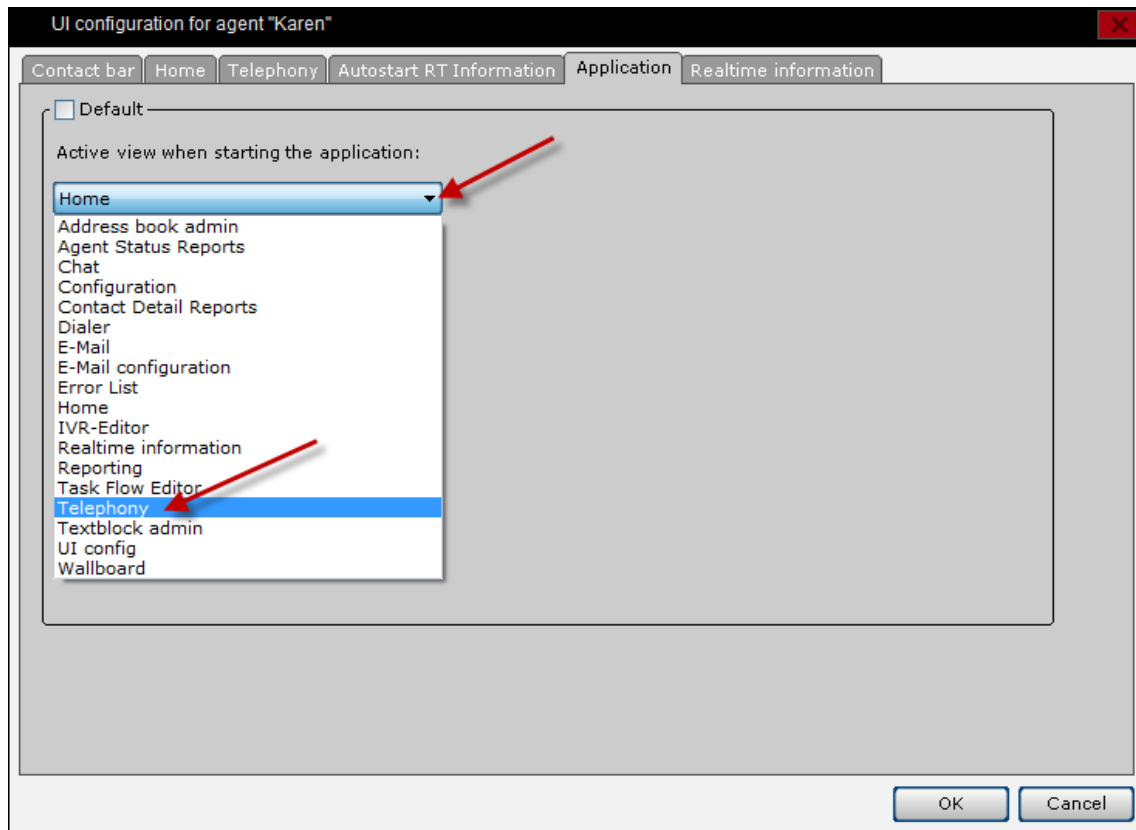
**Note:** If a newly created profile or agent is not visible in the displayed list, right mouse click and select refresh.



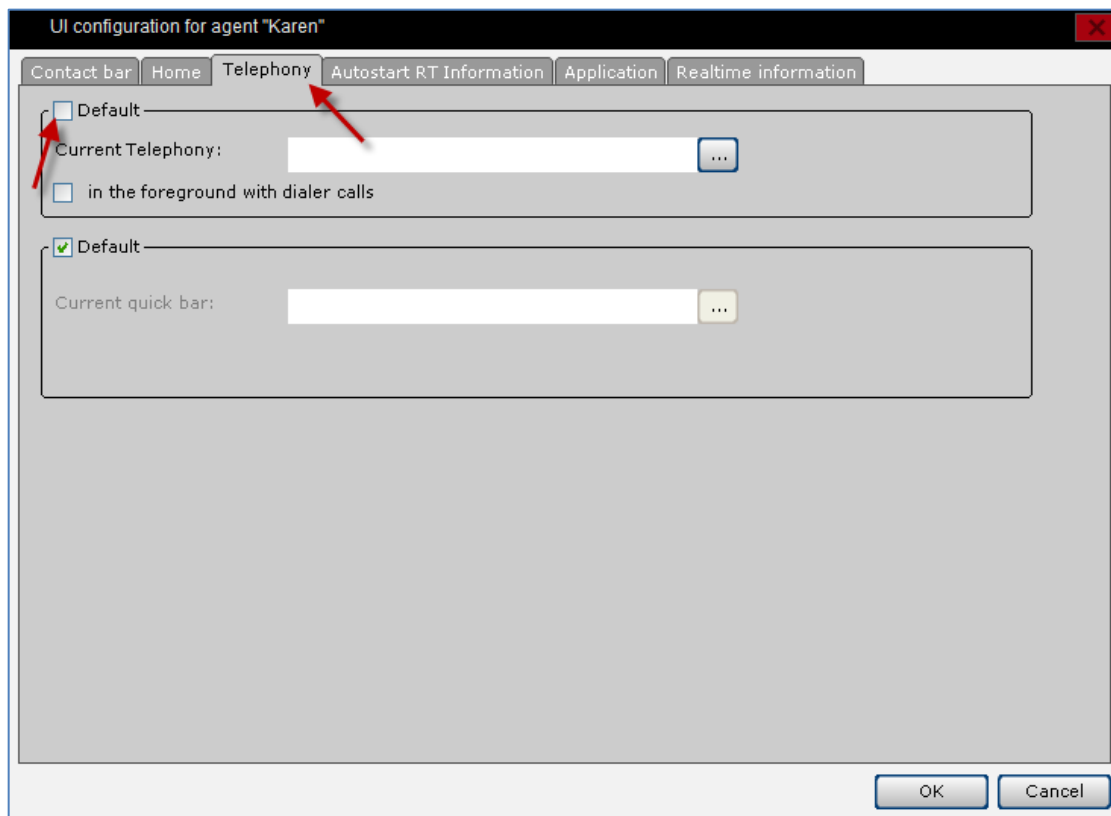
4. Select the **Application** tab and deselect the **Default** check box.



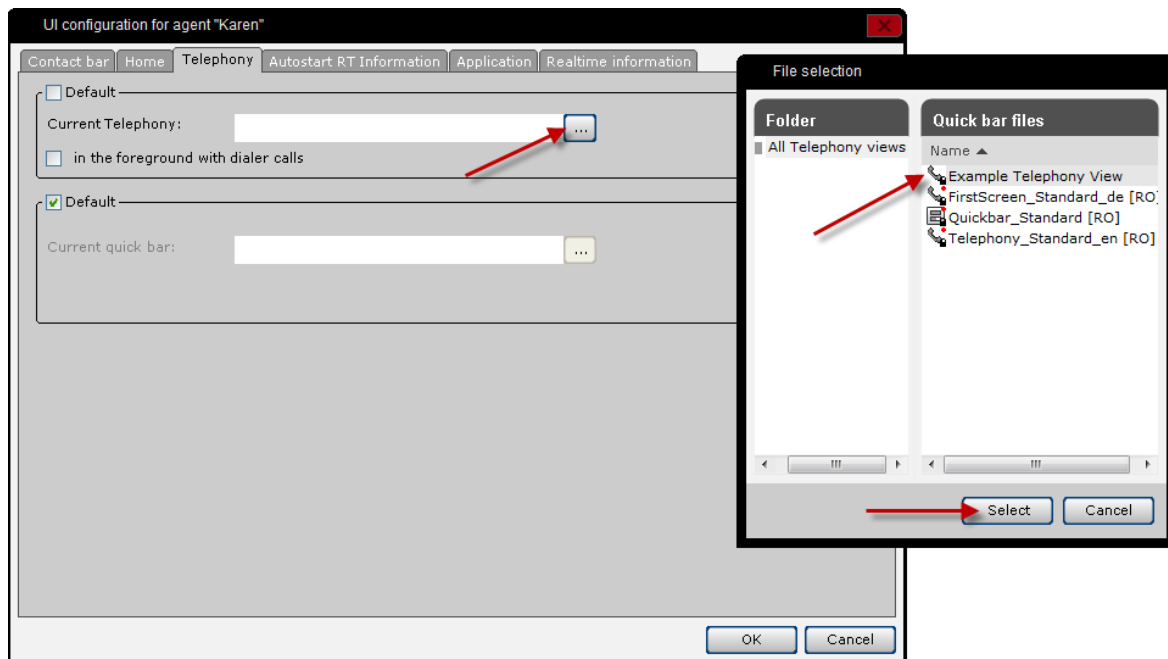
5. Click on the drop down box and select **Telephony** as the default view.



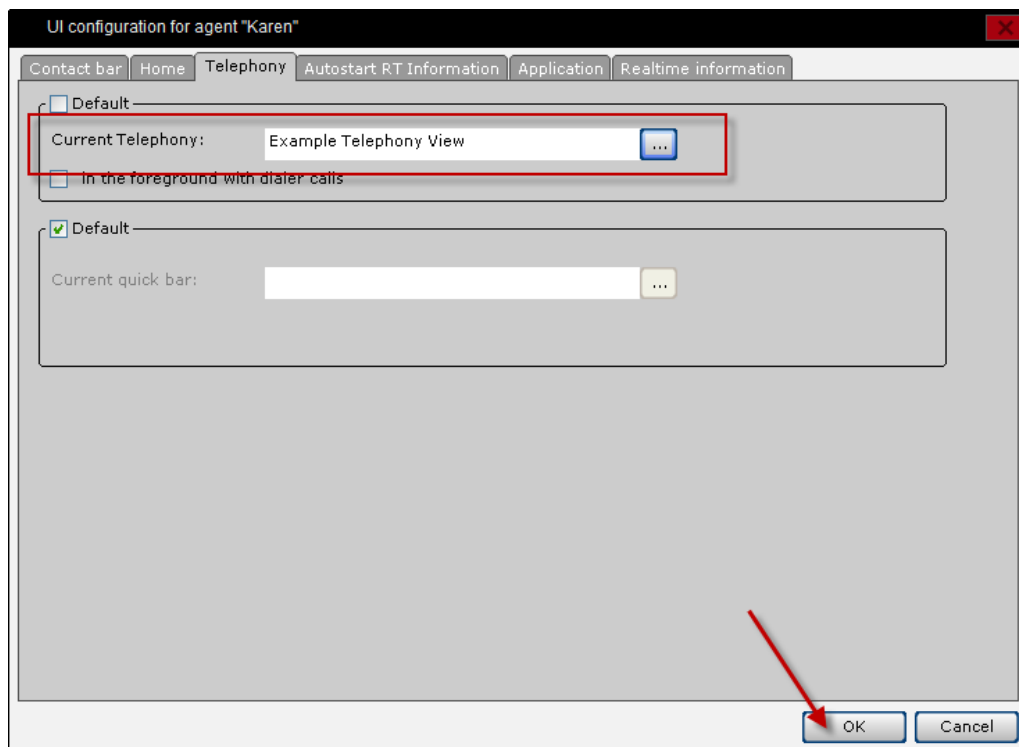
6. The file to be used can also be selected from the **Telephony** tab. Deselect the **Default** check box.



- Click the browser button and select the required file.

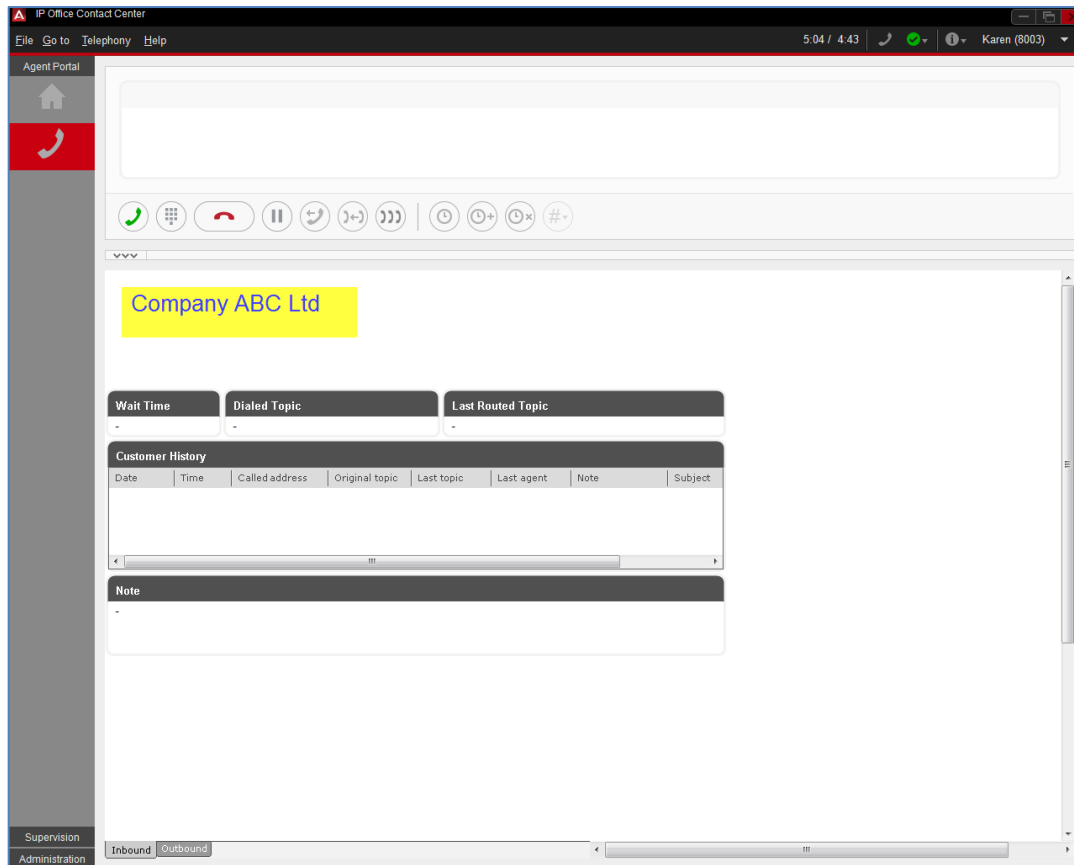


- The selected file is displayed. Click the **OK** button.



- When the agent next signs into the User Interface, the Telephony view and the selected Telephony View file will be displayed.

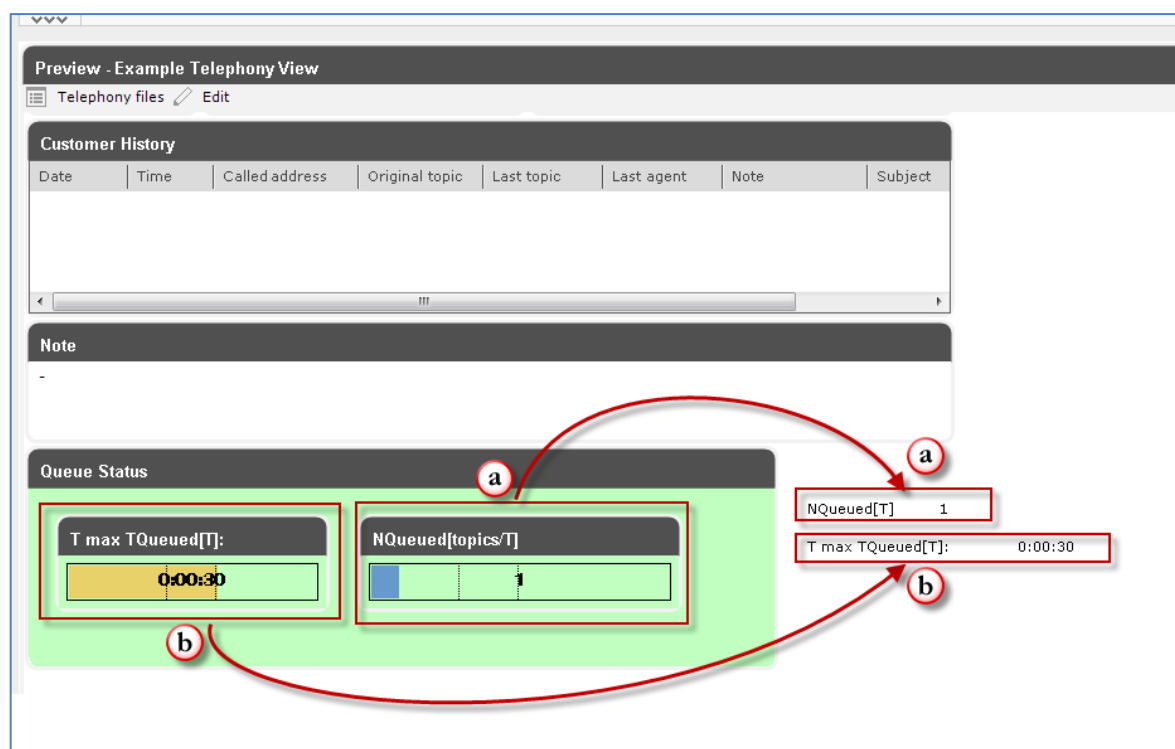




## Adding a Value Element & Longest Wait Time Element to the Telephony View

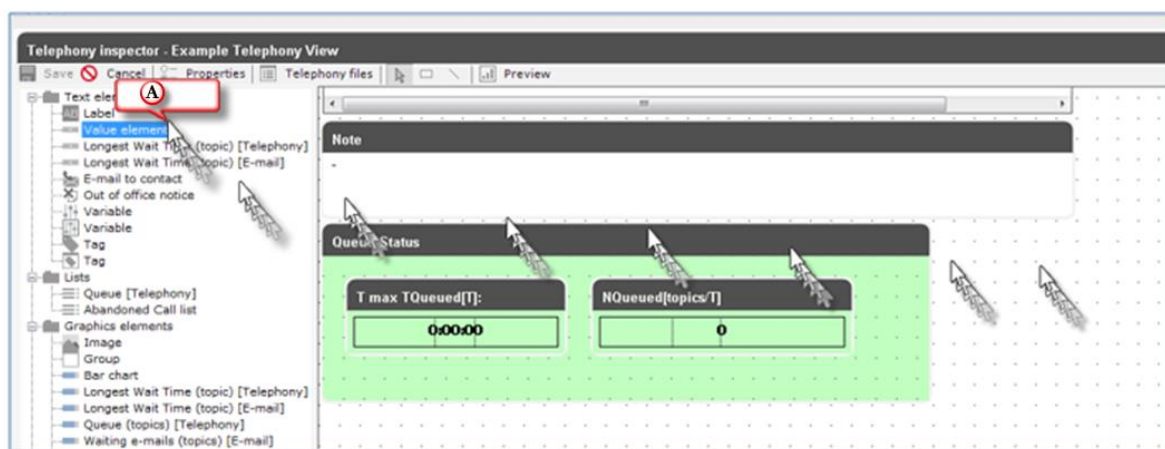
In a similar manner to the Longest Wait Time [Telephony] and Queue (topics) [Telephony] elements, the Value Element & Longest Wait Time Element display real time information to the agent. However this information is displayed as text rather than being enclosed within a bordered table.

- In the example below, a **Value** text element has been added that has been configured with a counter to display the number of waiting calls. This will display the same real time information as the **Queue (topics) [Telephony]** Graphics element.
- A **Longest Wait Time (topic) [Telephony]** Text element has been added that is associated with Topic 1, which will display the same real time information as the **Longest Wait Time (topic) [Telephony]** Graphics element, which is also associated with Topic1.



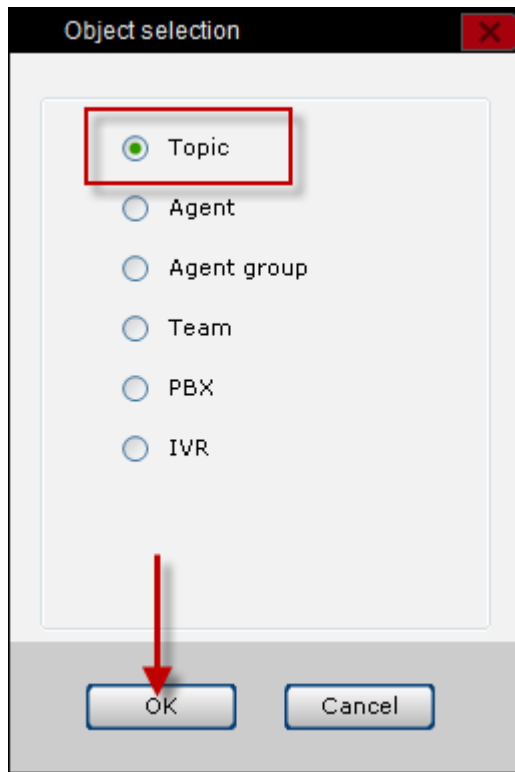
To add a Value element:

1. Select the **Value element** and drag it to the working area.

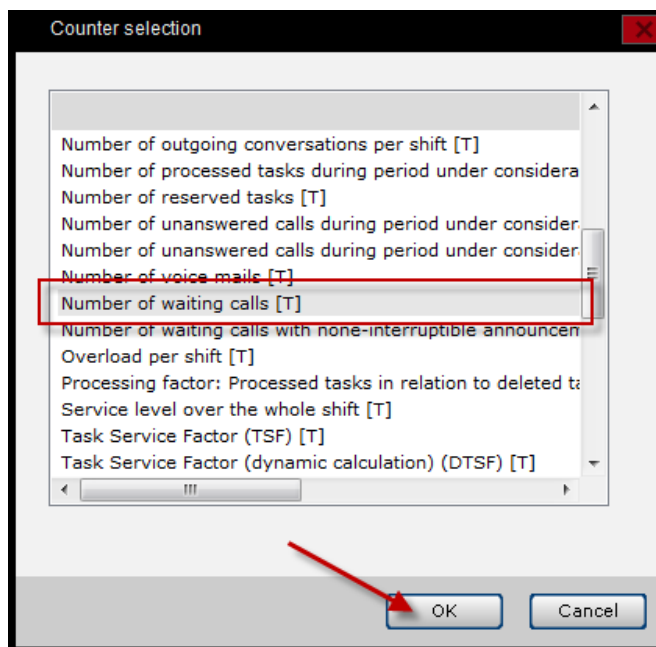


A. Click and drag.

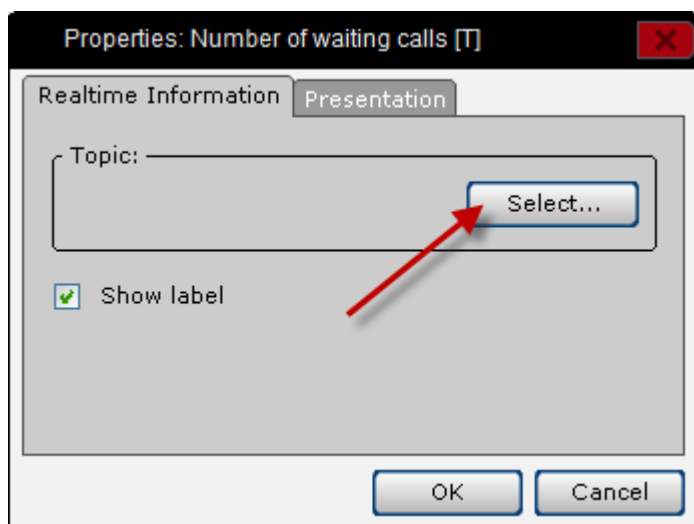
2. The **Object** selection window is displayed. Select the required object and then click the **OK** button. In this example, the **Topic** option has been selected.



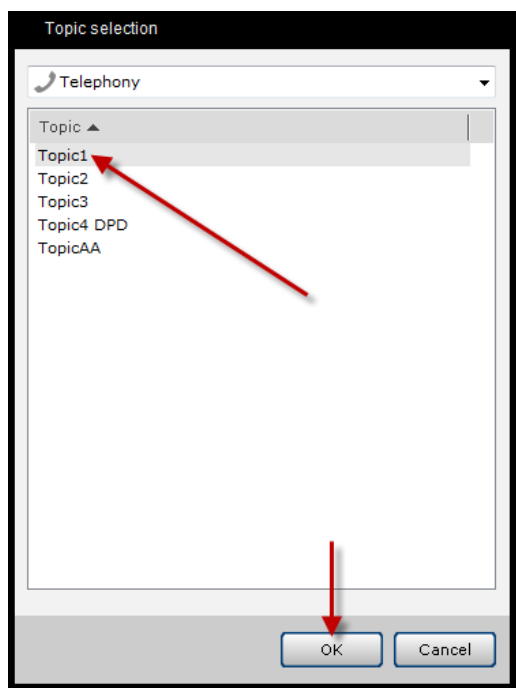
3. The **Counter selection** window is displayed, select the required Counter and click the **OK** button. In this example, the **Number of waiting calls** counter has been selected.



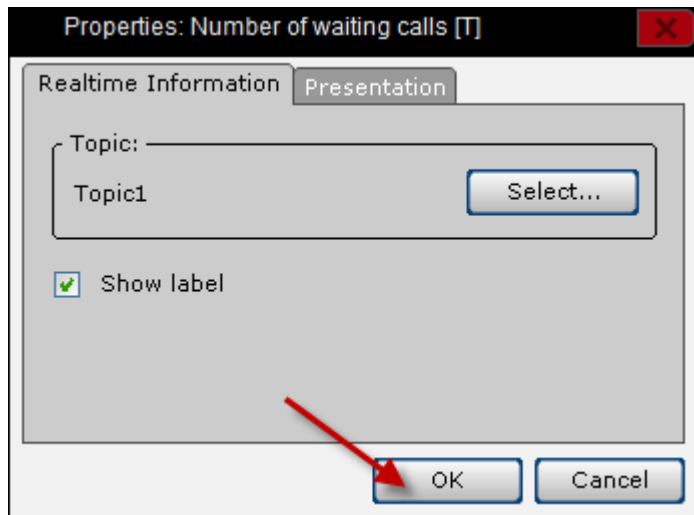
4. Click the **Select** button.



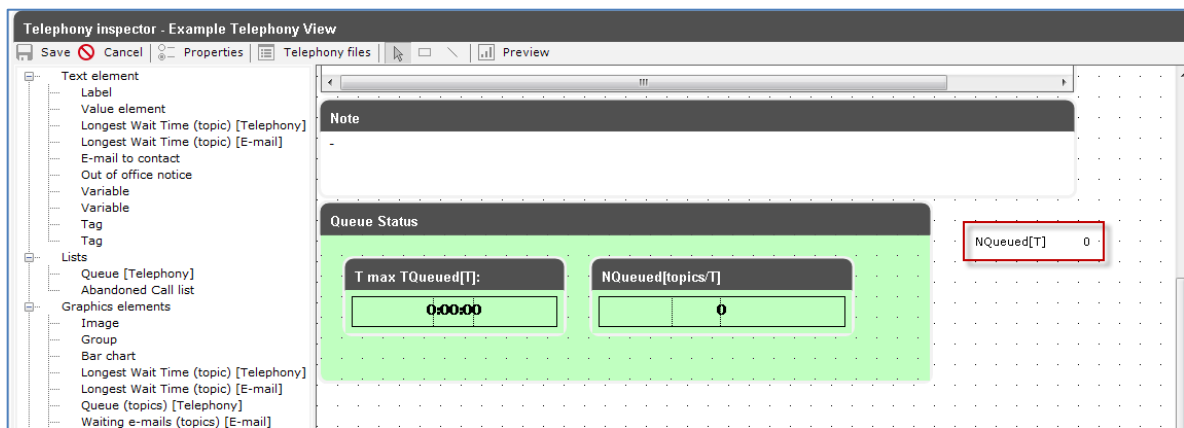
5. Select the required Topic followed by the **OK** button.



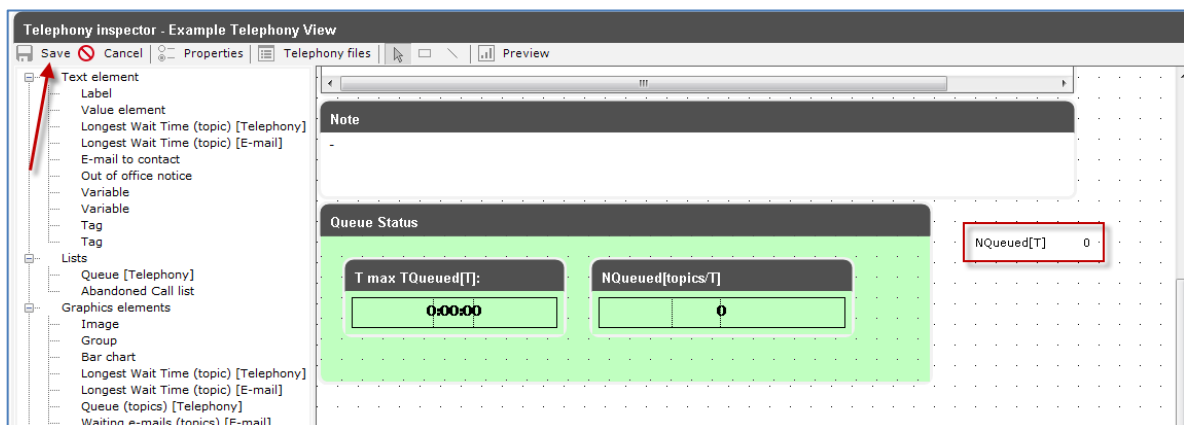
6. The selected Topic is displayed, click the **OK** button.



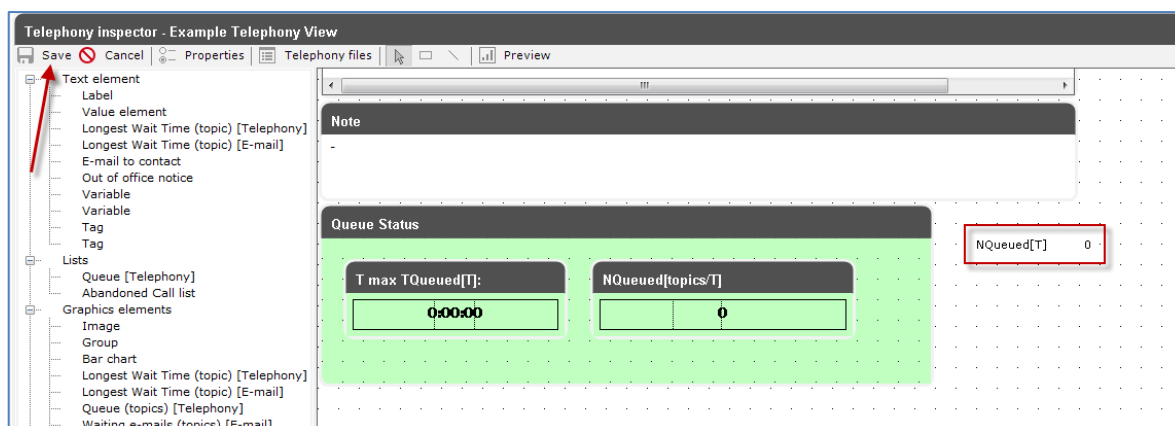
7. The configured element is displayed.



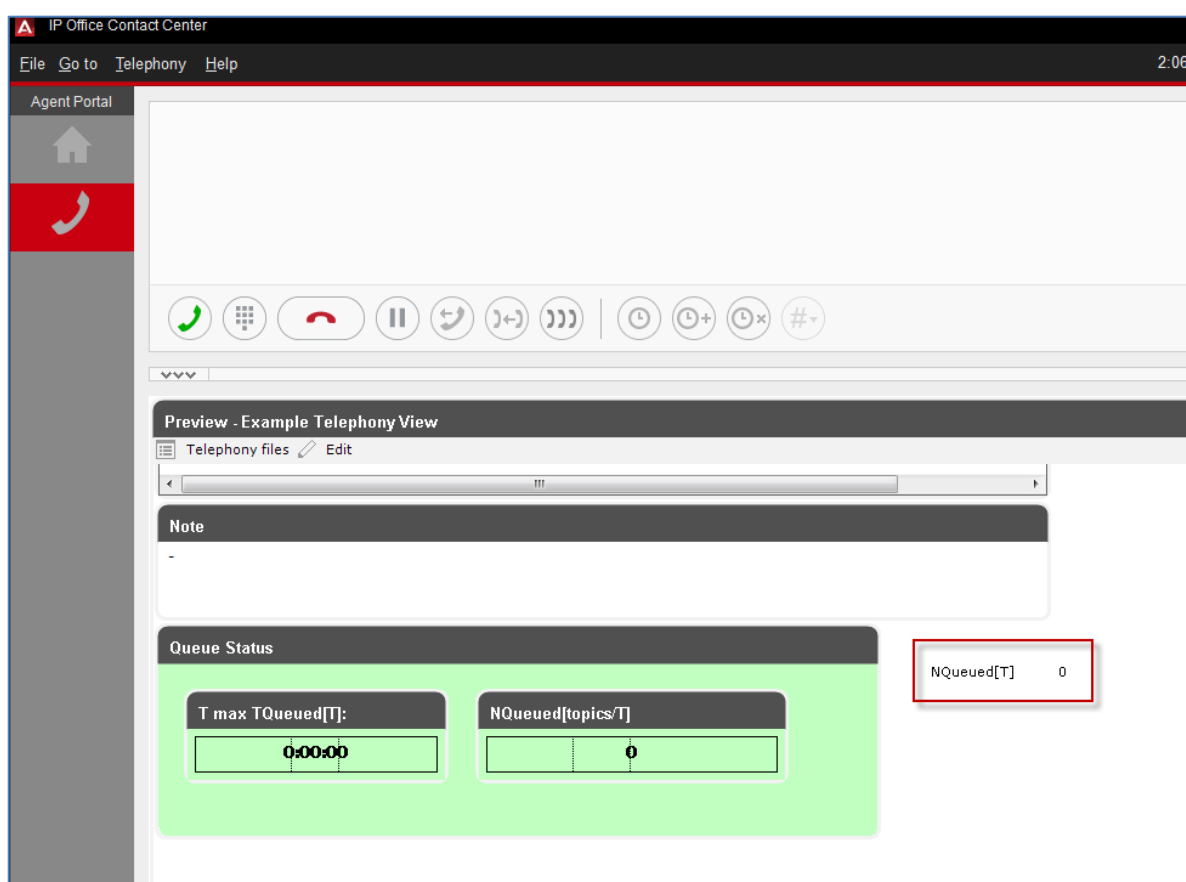
8. Click the **Save** button.



9. Click the **Preview** button.



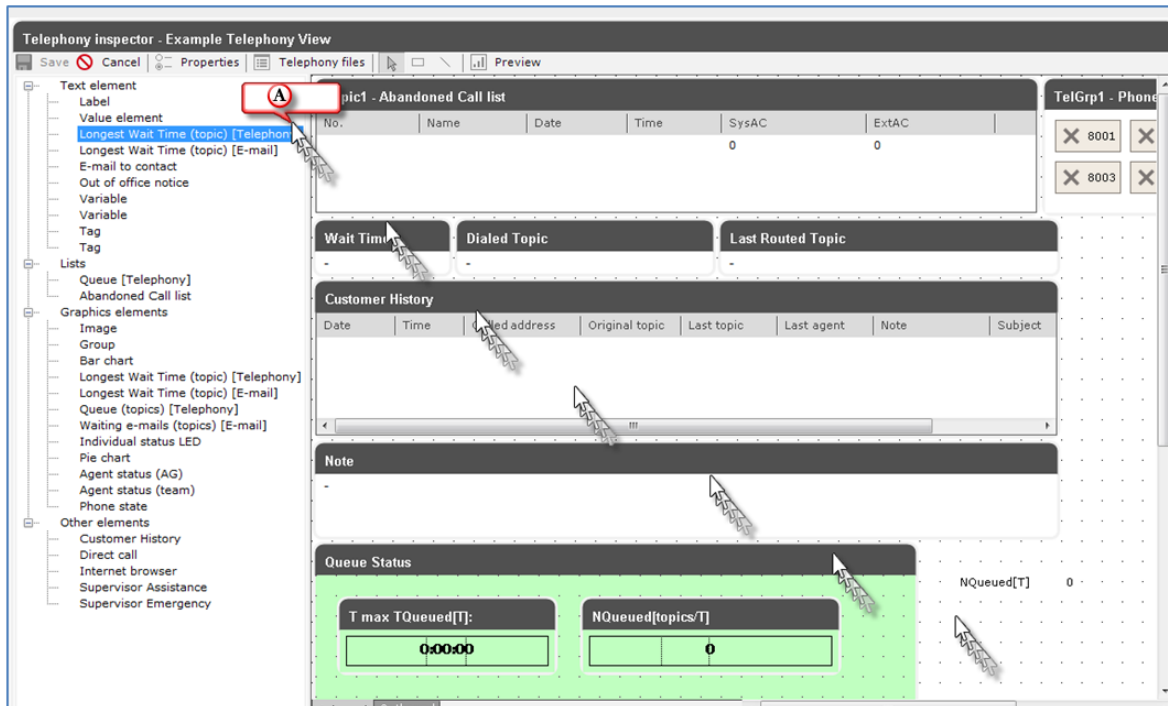
10. The configured element is displayed.



11. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

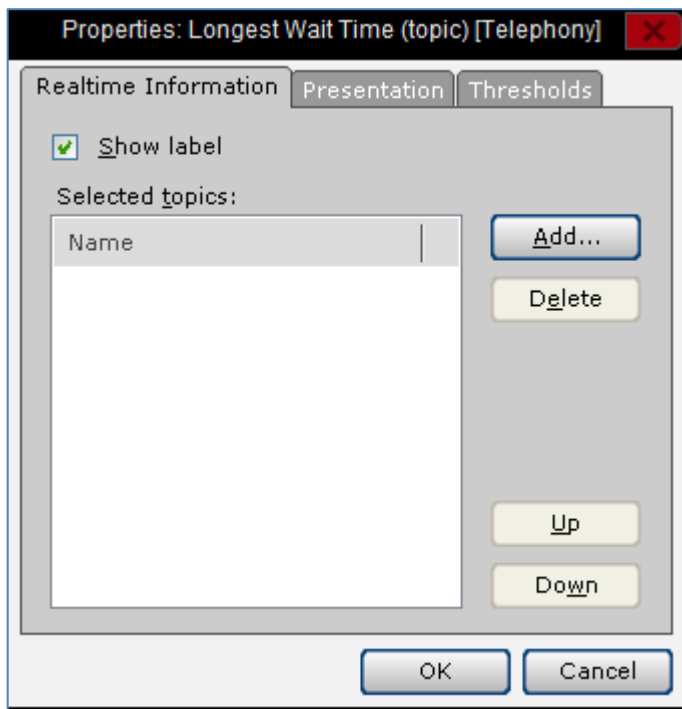
To add a Longest Wait Time (topic) [Telephony] Text Element:

1. Click on the **Longest Wait Time (topic) [Telephony]** element and drag it to the Working Area.

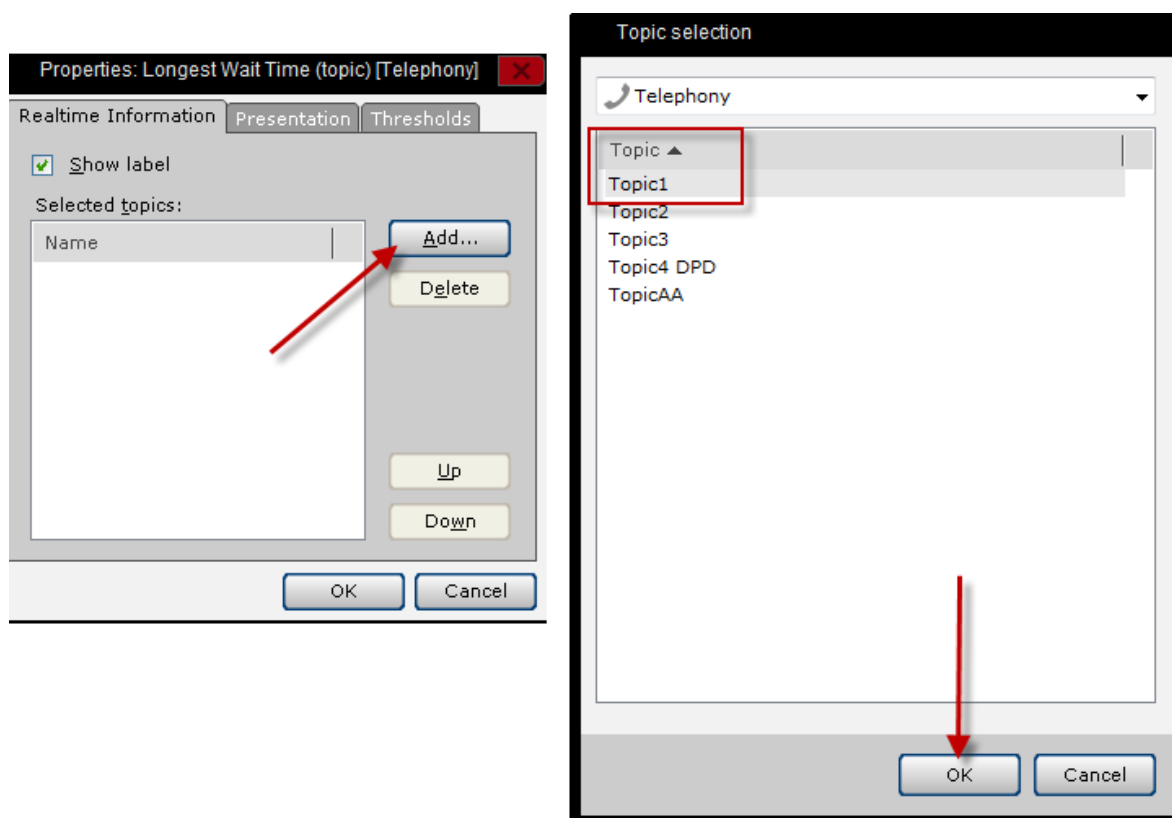


A. Click and drag.

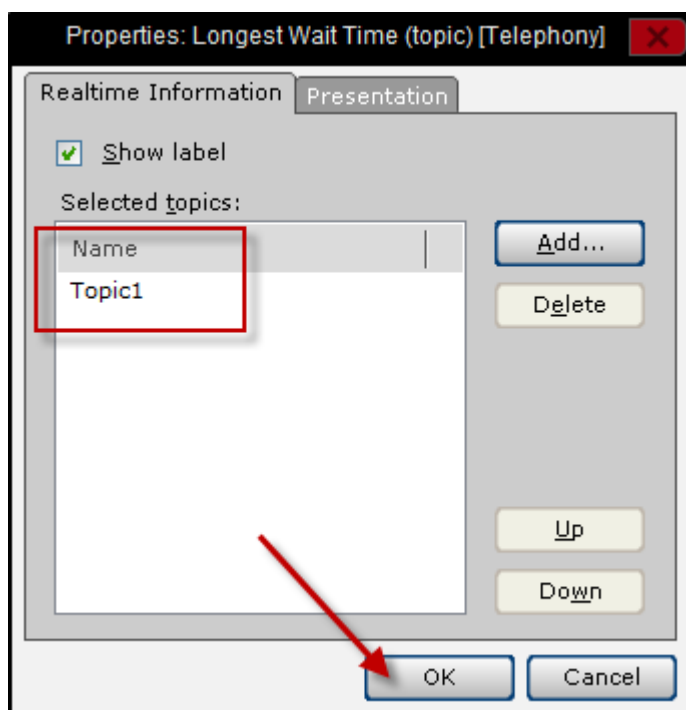
2. The **Properties** dialogue box is displayed.



3. Click the **Add** button and select the Topic to be utilized. Click the **OK** button.

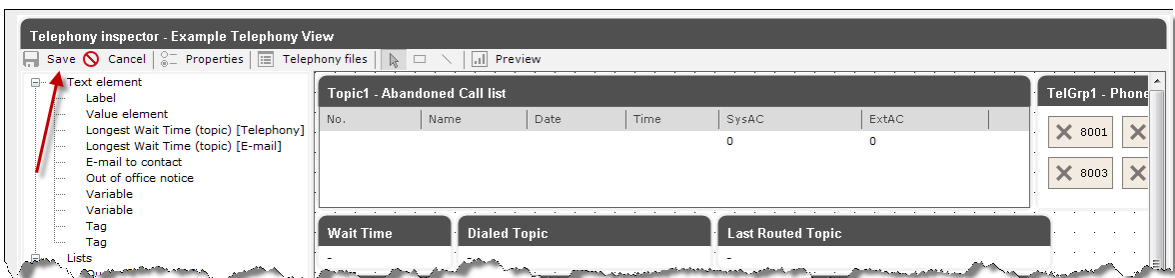
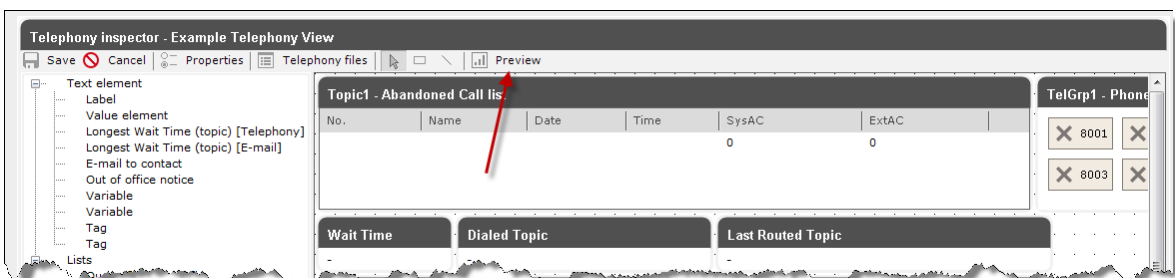


4. The selected Topic is displayed. Click the **OK** button.

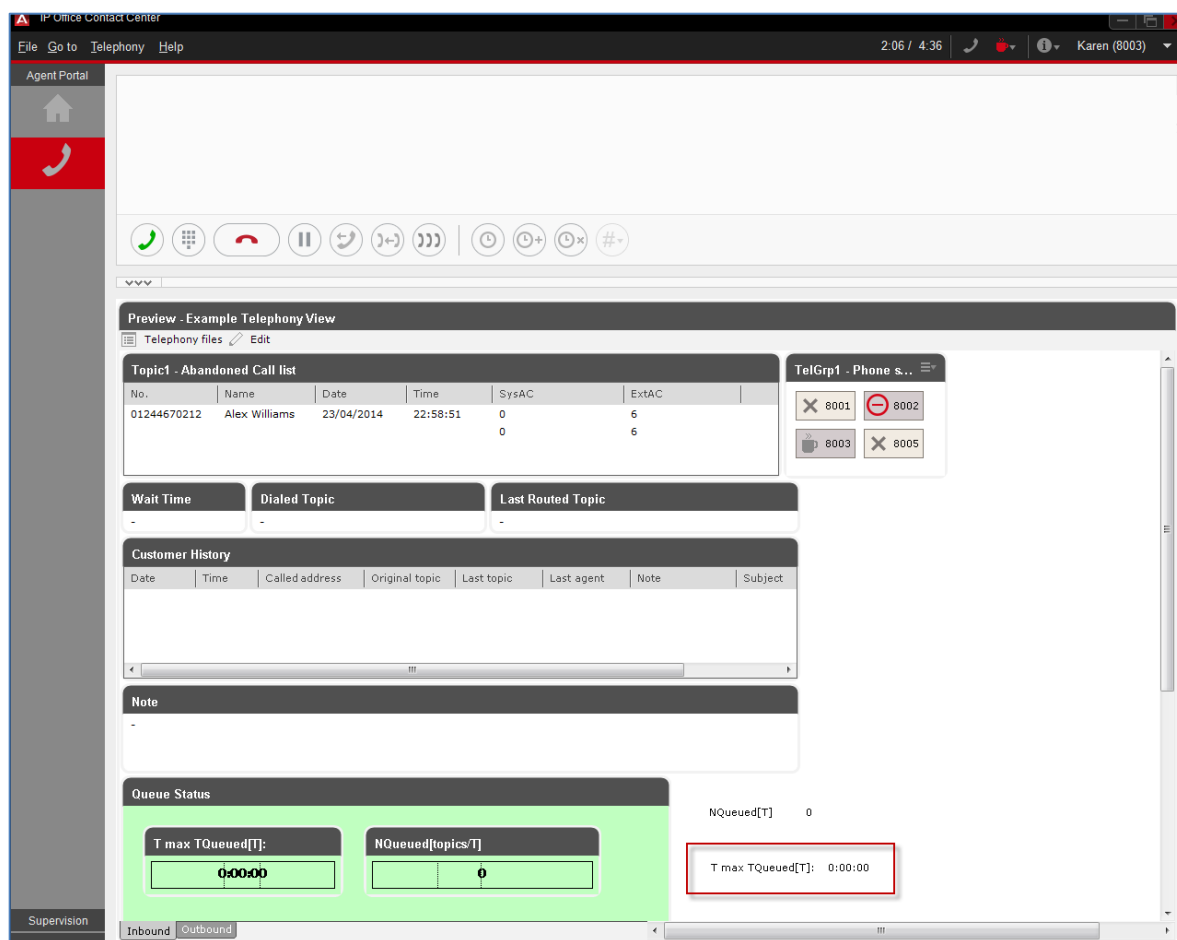




## 5. The configured element is displayed.

6. Click the **Save** button.7. Click the **Preview** button.

## 8. The configured element is displayed.

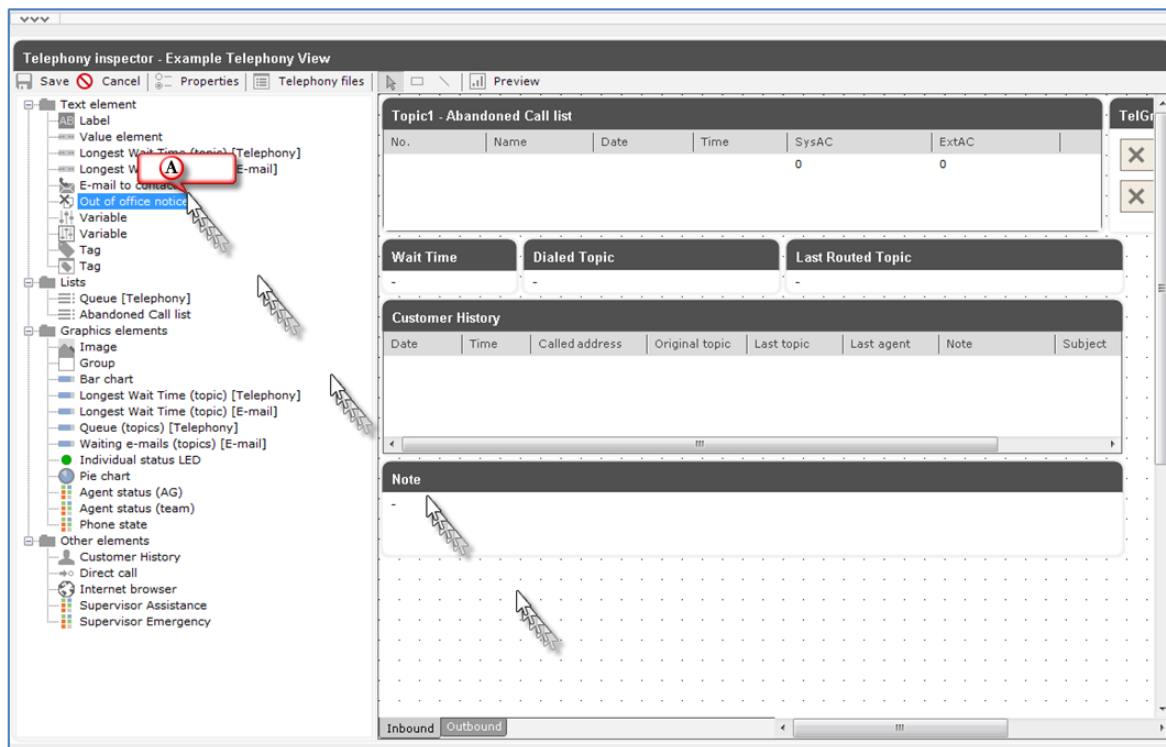
9. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Adding an Out of Office Notice to the Telephony View

Individual agents can have an **Out Of Office Notice** element added to their Telephony View. This may be required for example, if the agent has the Telephony View display as their default view, rather than the Home View.

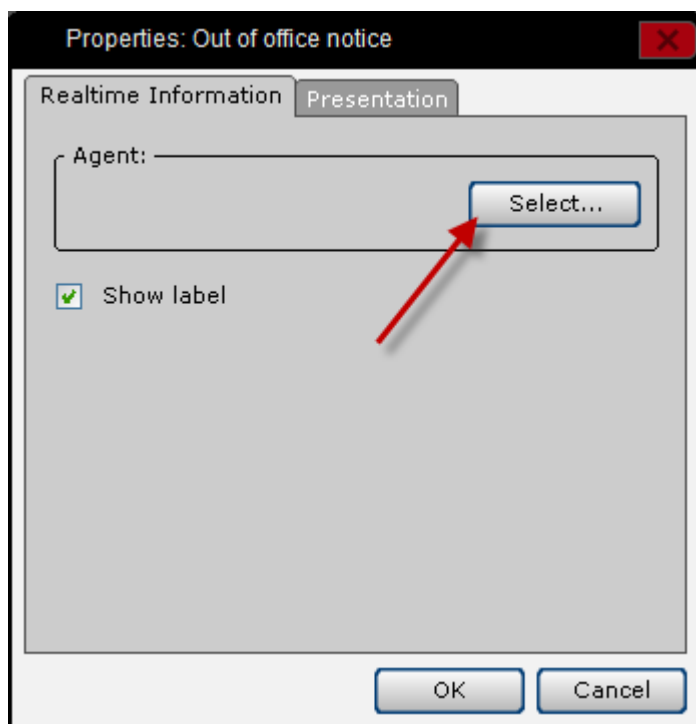
To add an **Out Of Office Notice** element:

1. Select the element and drag it to the Working Area.

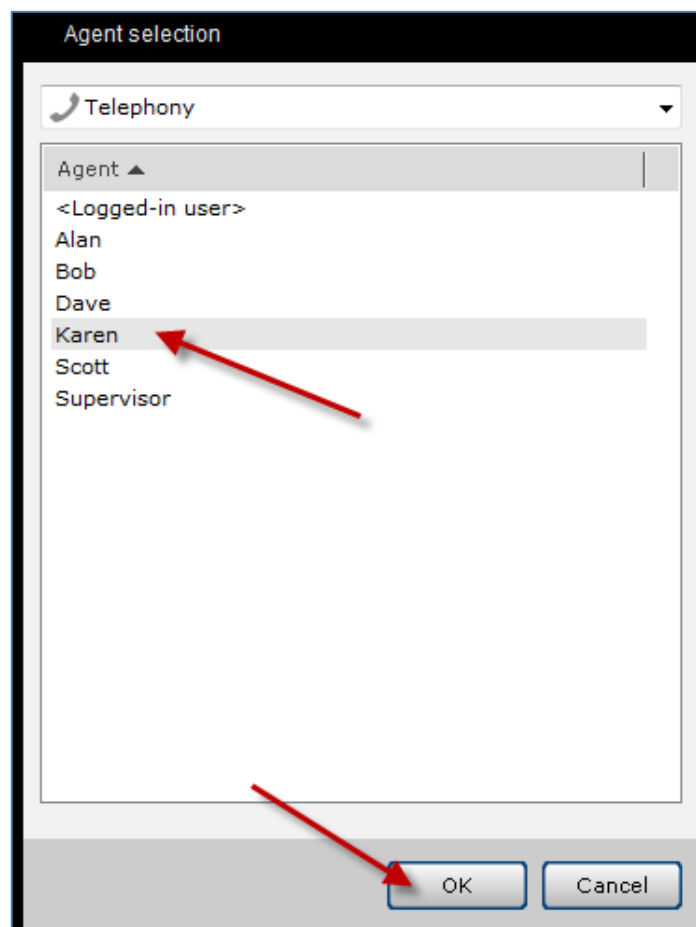


A. Click and drag.

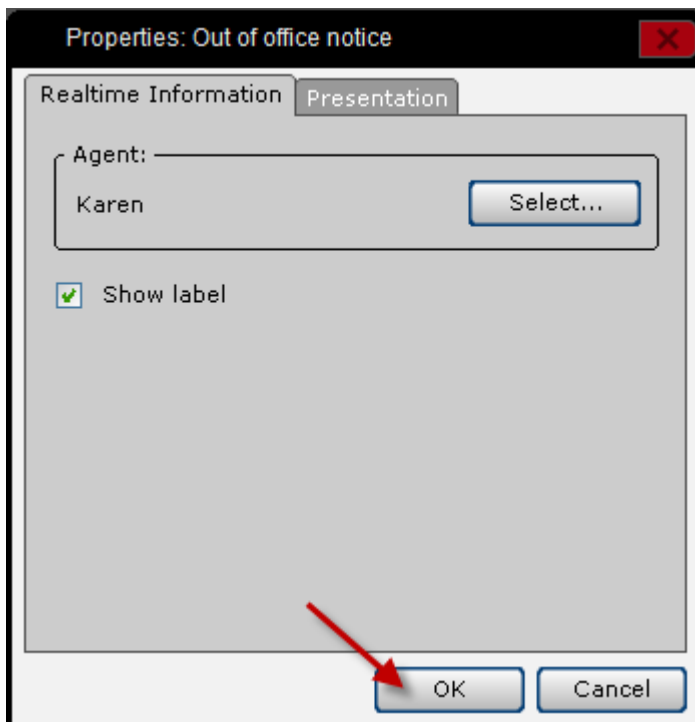
2. The **Properties** dialogue box is displayed. Click the **Select** button.



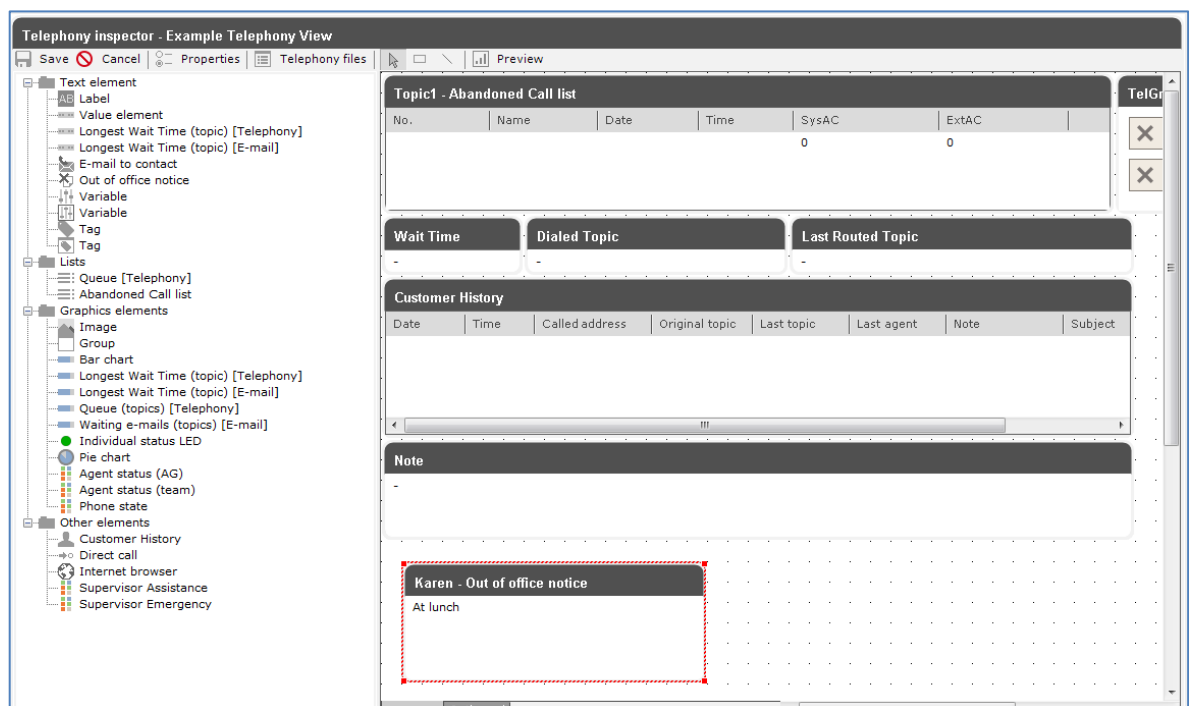
3. Select the required agent and then click the **OK** button.



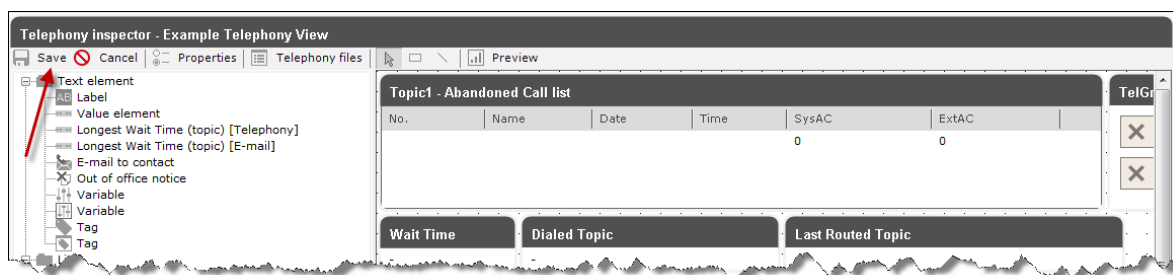
- Click the **OK** button.



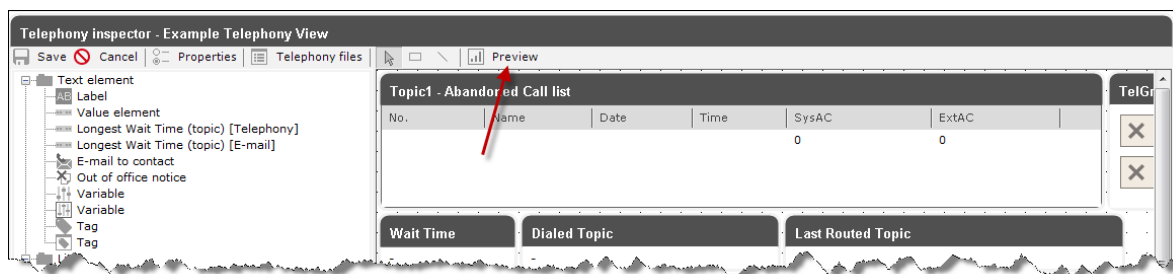
- The element is displayed.



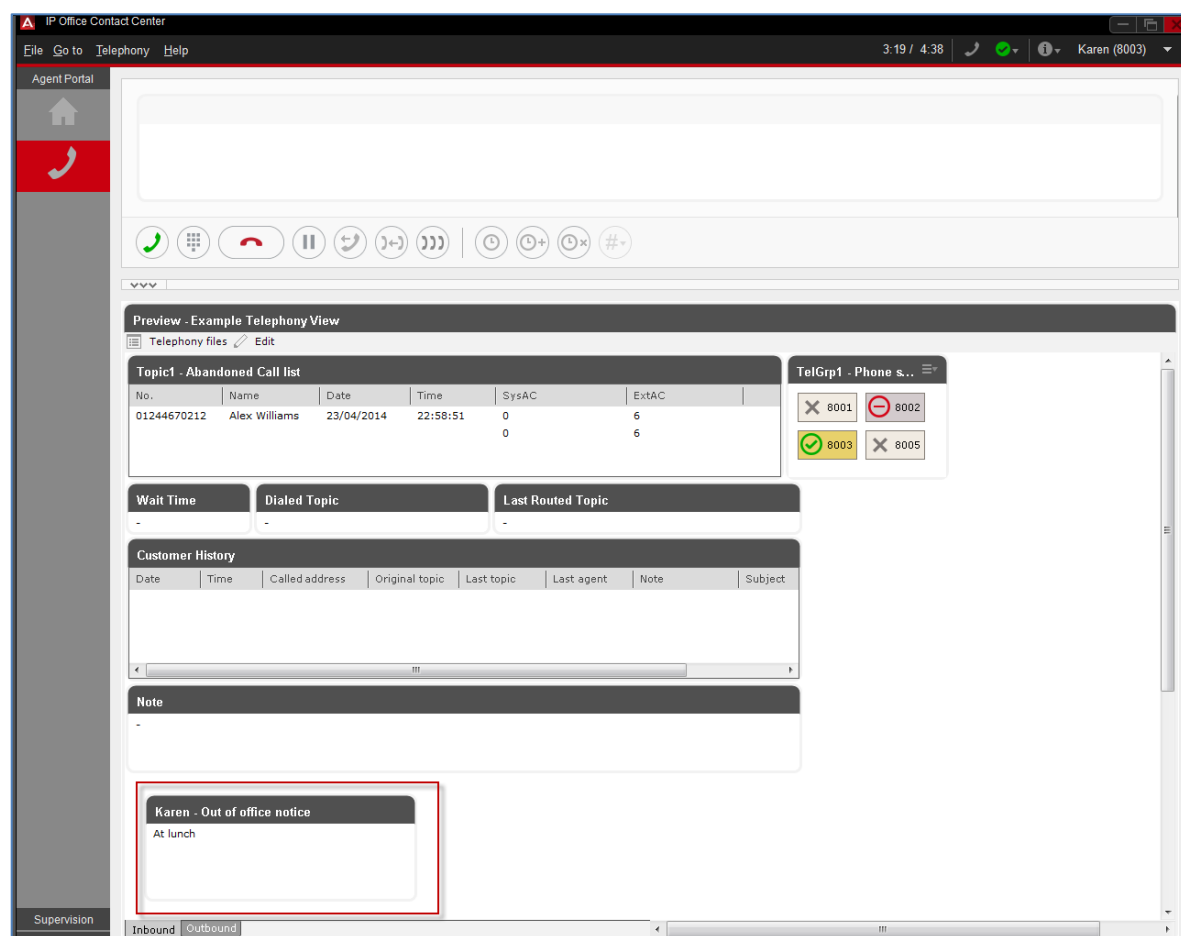
- Click the **Save** button.



7. Click the **Preview** button.



8. The **Out of Office Notice** is displayed.



9. To add message, click into the box and type as required. Then click the tick icon.



10. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Adding a Variable Element to the Telephony View

There are two Variable elements available:

Variable (name and value) 

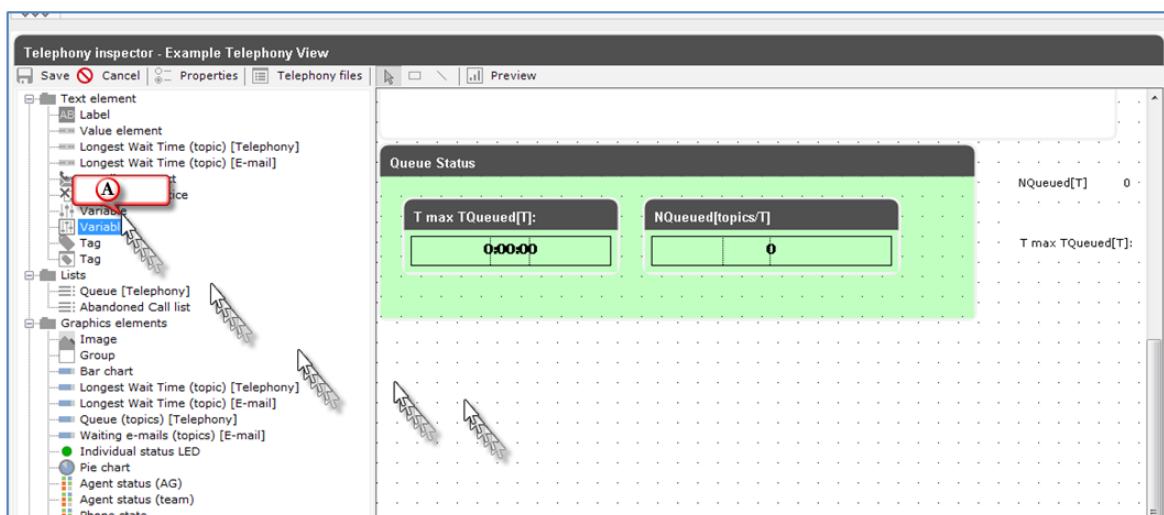
Variable (window display) 

These can be used in the same manner; the only difference between the two is the way that the element is displayed on the user interface. Variables can be configured to show minimum and a maximum values, display a slide control, or a text marquee.

In the example below, a variable will be configured to display a text marquee on the users display. This could be used by for example a supervisor, who may wish to send important messages to, their contact center staff.

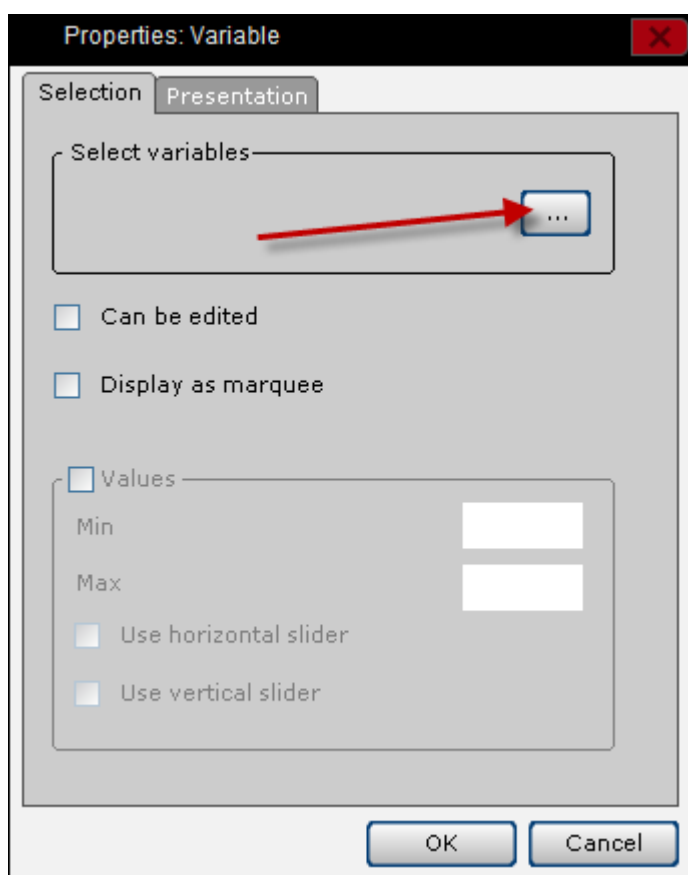
To add a Variable:

1. Select the required **Variable** element. In this example the **Variable (window display)** has been selected. Drag the element to the Working Area.



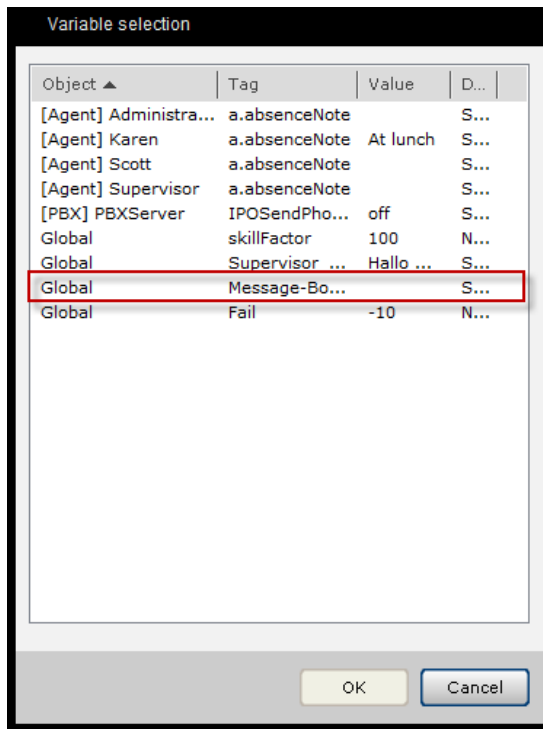
A. Click and drag.

2. The **Properties** dialogue box is displayed.
3. Click the browser button.

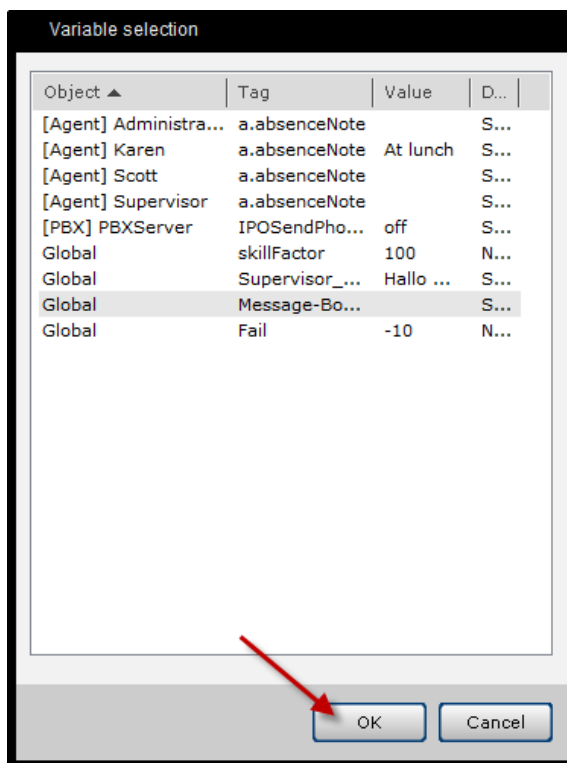




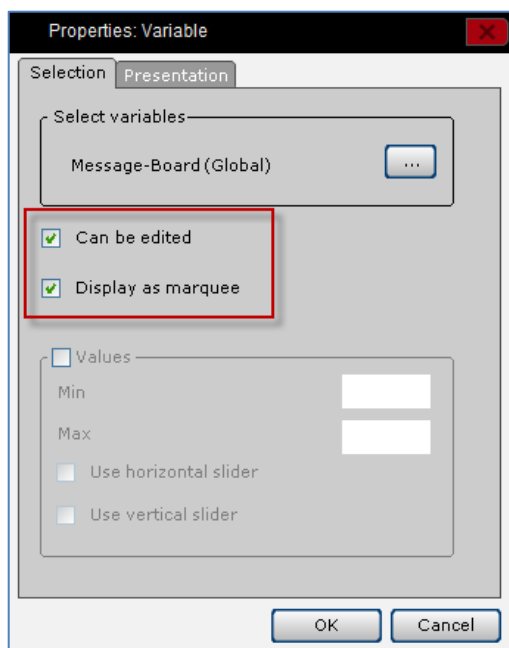
4. Select the required Variable. In this example, the **Global Message Board** variable has been selected.



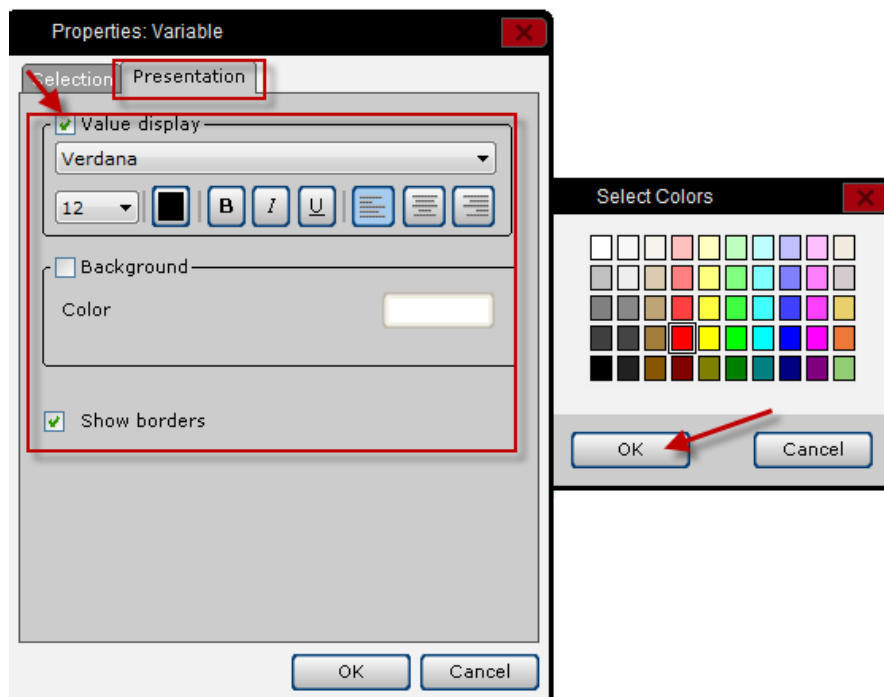
5. Click the **OK** button.



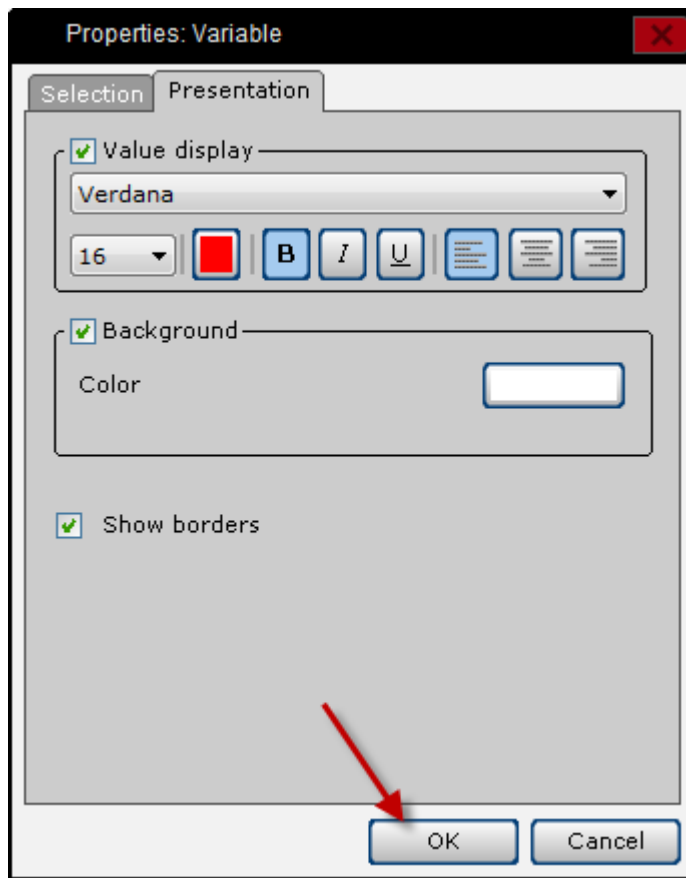
6. Select the **Can be edited** and **Display as marquee** check boxes.



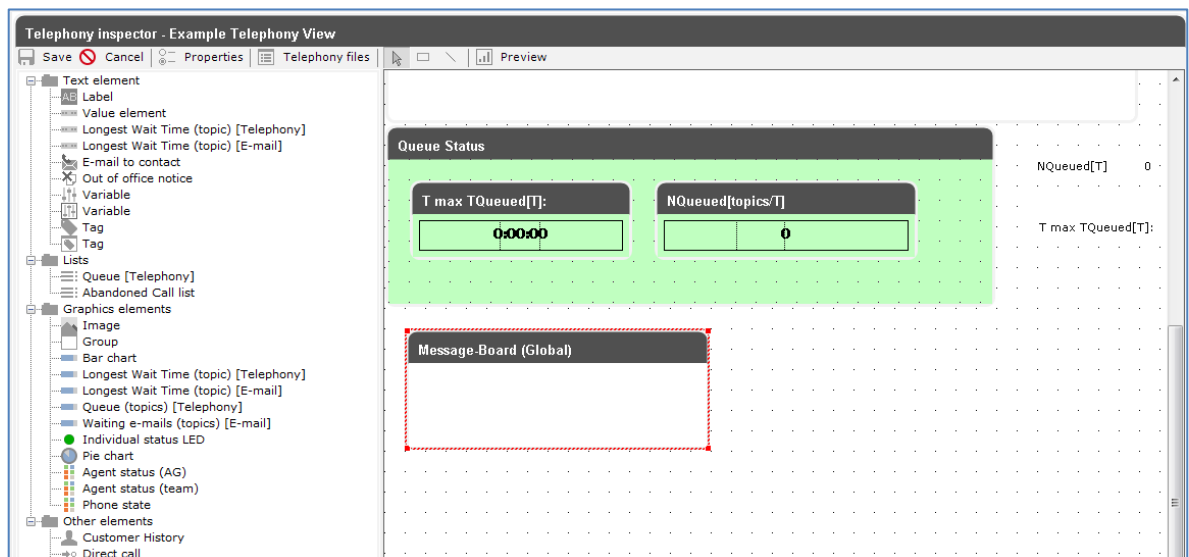
7. The font style, color and size can be changed as required from the **Presentation** tab.

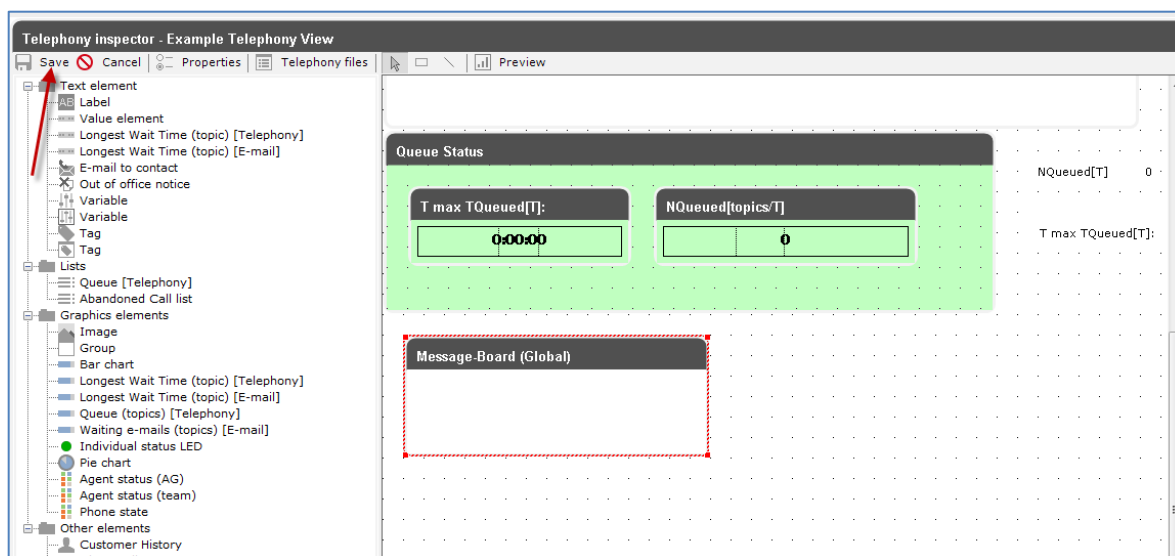


8. Click the **OK** button.

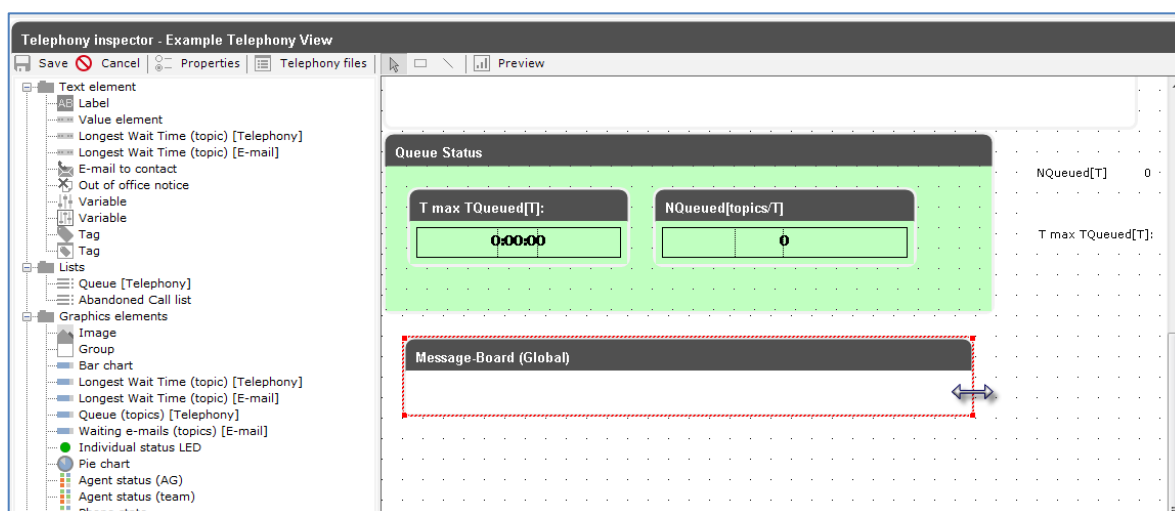


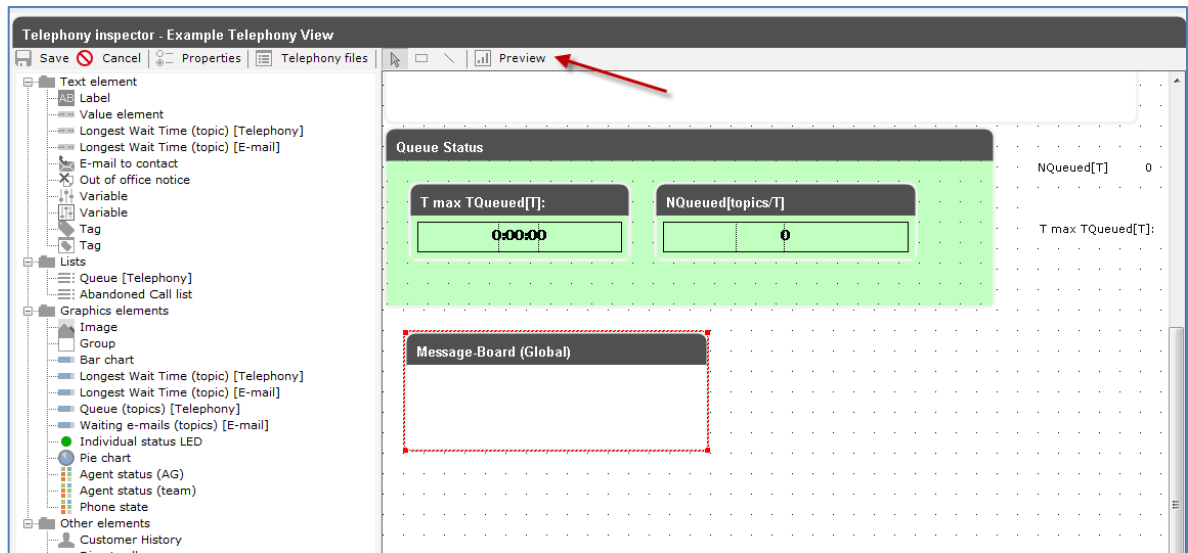
9. The element is displayed.



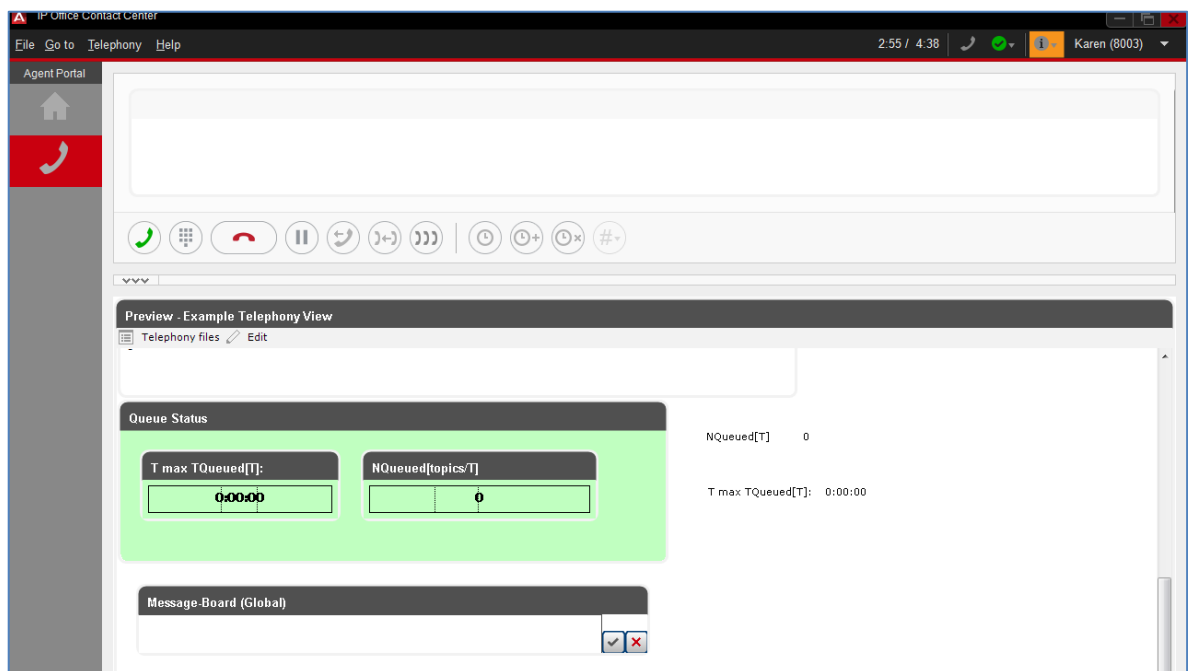
10. Click the **Save** button.

The size of the element can be adjusted as required.

11. Click the **Preview** button.



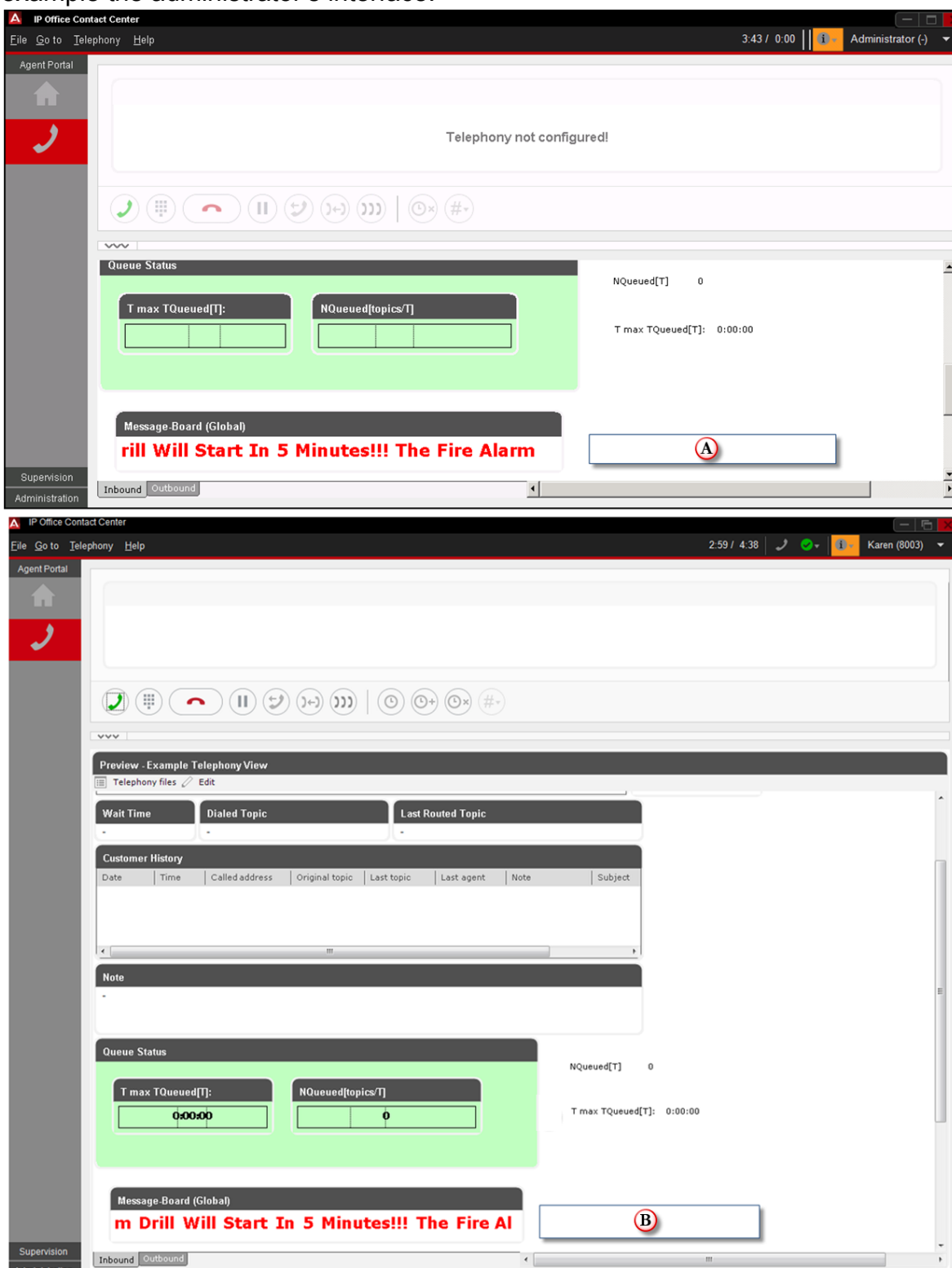
12. The element is displayed.



13. To add text to the marquee, click into the element box, type in the text and click the tick icon.

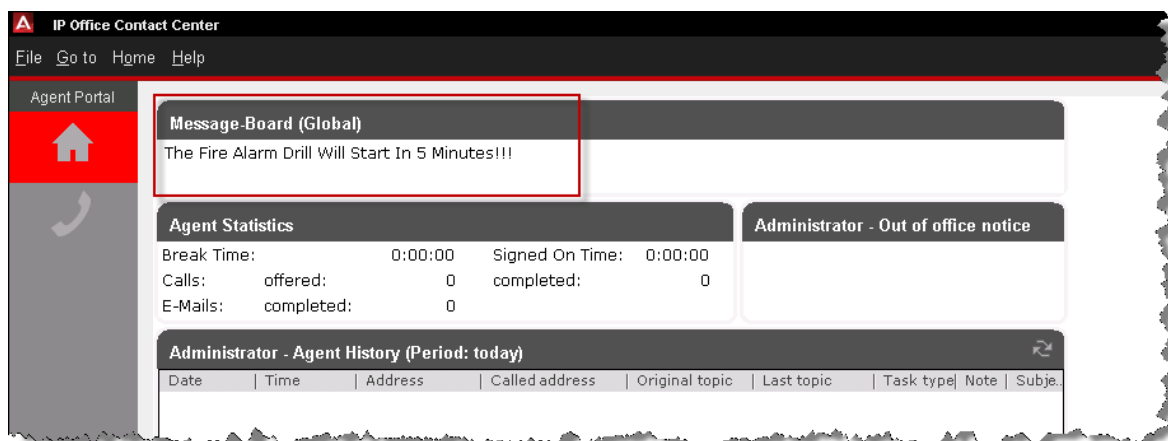


14. The scrolling message will be displayed on the agent's interface and for example the administrator's interface.



- A. Administrator Interface  
B. IP Office Contact Center Agent Interface.

15. The global message will also be displayed on the Home View.



## Adding a Call Tag to the Telephony View

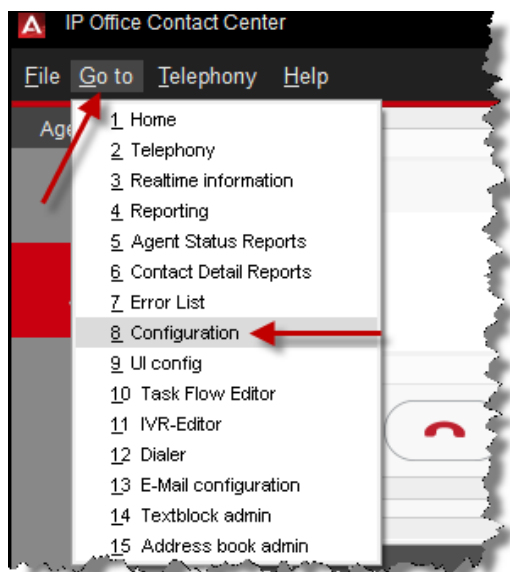
A tag can be attached to a call and includes additional information that can be referenced during the call. The tag is therefore active for the duration of the call. Tags can either contain text or values. The information contained in the tag which for example, could relate to a customer identification number or customer name can then be displayed on the Telephony View by using and configuring a Tag element.

In the following example, Tags will be added to the Telephony View that will display the **Customer's Name** and **Customer Number**.

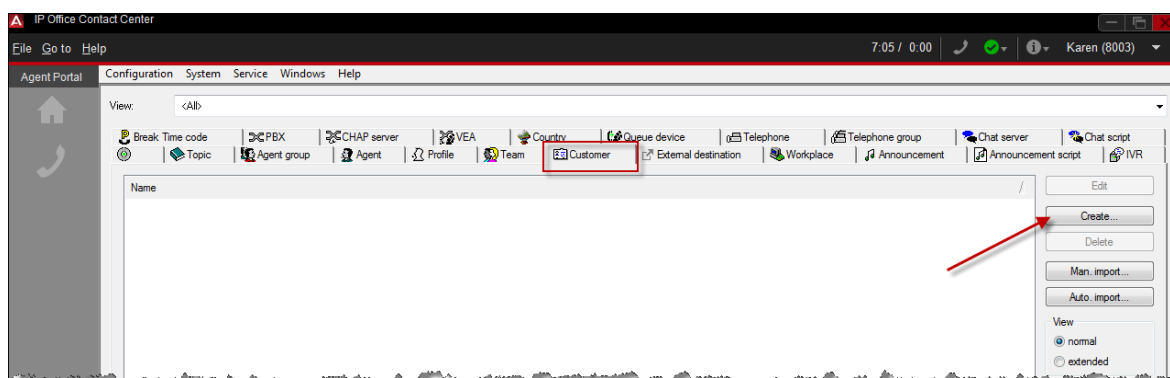
In order for these details to be displayed, they must first be added to the IP Office Contact Center as a **Customer record**.

## Adding a Customer Record

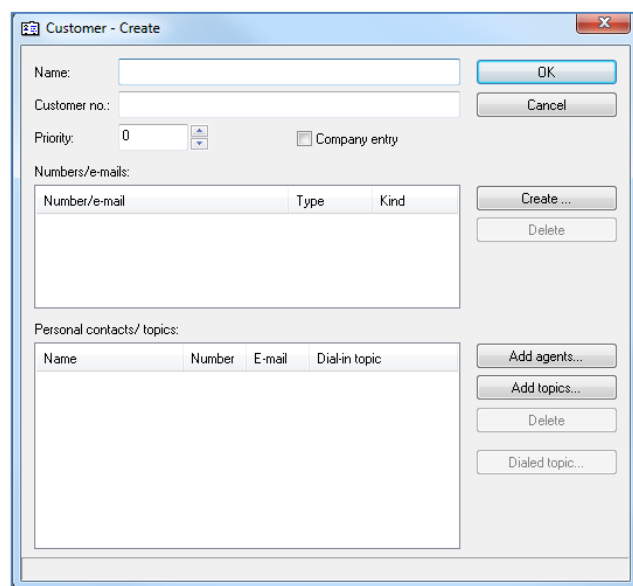
1. To add a new Customer record select **Goto** followed by **Configuration**.



2. Then select the **Customer** tab and click the **Create** button.



3. The **Customer** dialog box is displayed.





4. Enter the customer's name in the **Name** field.

Customer - Edit

Name: Alex Williams

Customer no.:

Priority: 0

☒ Company entry

Numbers/e-mails:

Number/e-mail	Type	Kind
---------------	------	------

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic
------	--------	--------	---------------

Buttons: OK, Cancel, Create..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

5. Enter a Customer Number in the **Customer no** field. This is a unique number, telephone number or email address that can be used to identify this customer.

Customer - Edit

Name: Alex Williams

Customer no.: 0112

Priority: 0

☒ Company entry

Numbers/e-mails:

Number/e-mail	Type	Kind
---------------	------	------

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic
------	--------	--------	---------------

Buttons: OK, Cancel, Create..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

6. A priority can be assigned to this customer record. This can be referenced within a call flow to route the call on a prioritized basis.

Customer - Edit

Name: Alex Williams

Customer no.: 01 [ ] 2

Priority: 0

☒ Company entry

Numbers/e-mails:

Number/e-mail	Type	Kind

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic

Buttons: OK, Cancel, Create ..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

7. The **Company Entry** determines how the customer will be recognized via number or email address. A company number can be added or an individual employee's full number can be added. If the full number is added this is displayed when the full number is recognized by IP Office Contact Center. If the check **Company Entry** check box is selected, the company number is displayed if there is a match to the leading digits of the company number.

Customer - Edit

Name: Alex Williams

Customer no.: 01 [ ] 2

Priority: 0

☒ Company entry

Numbers/e-mails:

Number/e-mail	Type	Kind

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic

Buttons: OK, Cancel, Create ..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

8. Click the **Create** button.

Customer - Edit

Name: Alex Williams

Customer no.: 01 2

Priority: 0 ☒ Company entry

Numbers/e-mails:

Number/e-mail	Type	Kind

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic

Buttons: OK, Cancel, Create ..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

9. In the **Number/email** field, enter a telephone number or email address that can be used to reference this customer.

Customer - Edit

Name: Alex Williams

Customer no.: 01244670212

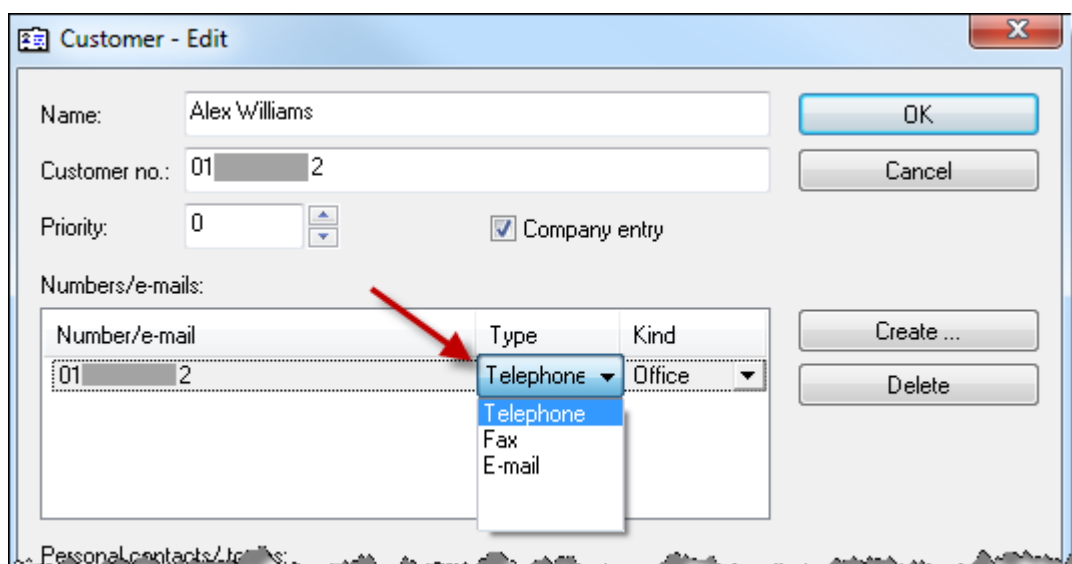
Priority: 0 ☒ Company entry

Numbers/e-mails:

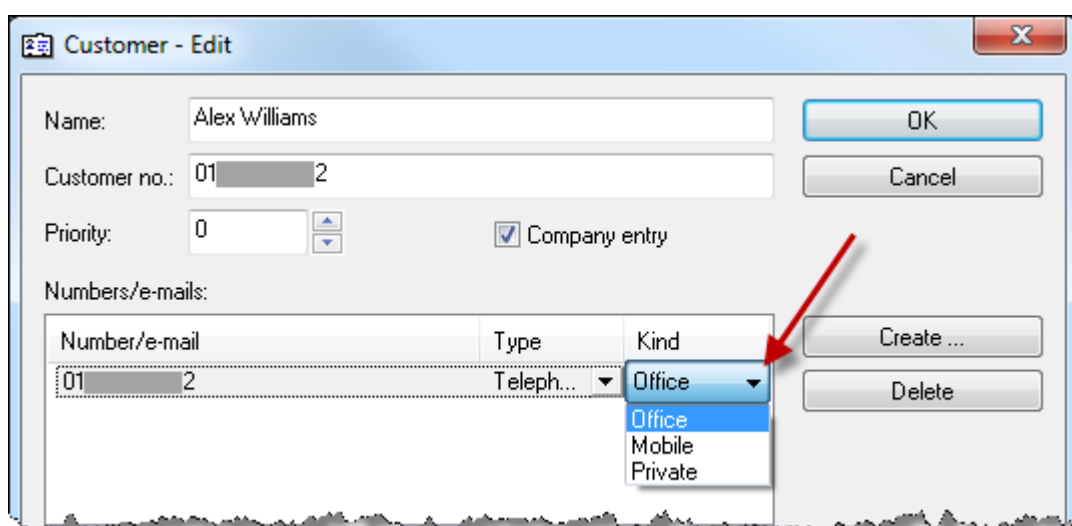
Number/e-mail	Type	Kind
01 2	Teleph...	Office

Buttons: OK, Cancel, Create ..., Delete

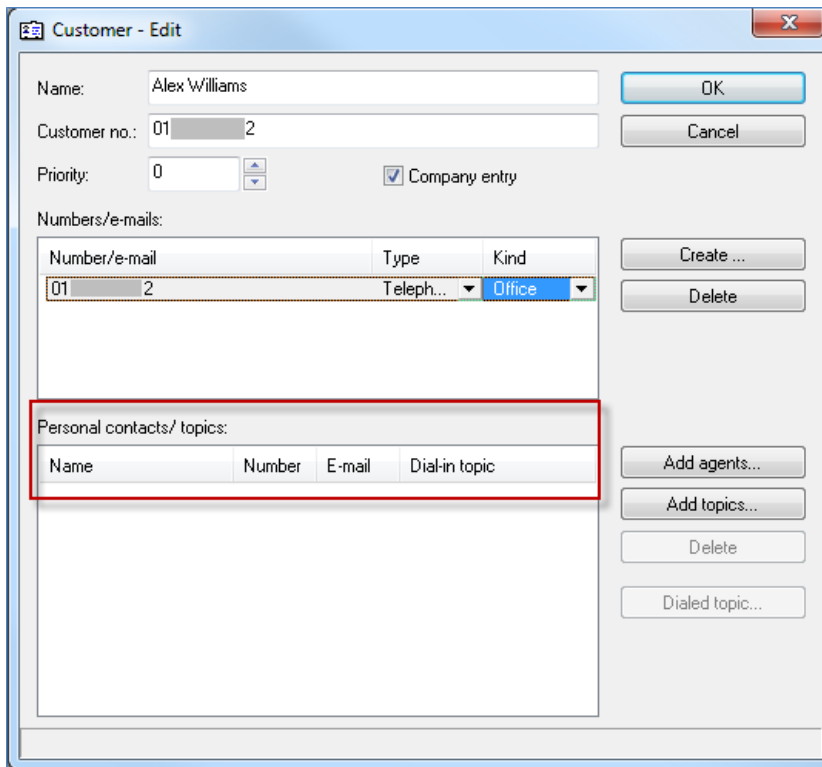
10. From the **Type** drop down box, select the required Type i.e. number, fax or email.



11. From the **Kind** drop down box select Office, Mobile or Private in relation to the data entered in the adjacent Numbers/emails field.



12. Agents, Topics and Dialed Topics can be assigned as Personal Contacts / Topics.



**Customer - Edit**

Name: Alex Williams

Customer no.: 01 2

Priority: 0 ☒ Company entry

Numbers/e-mails:

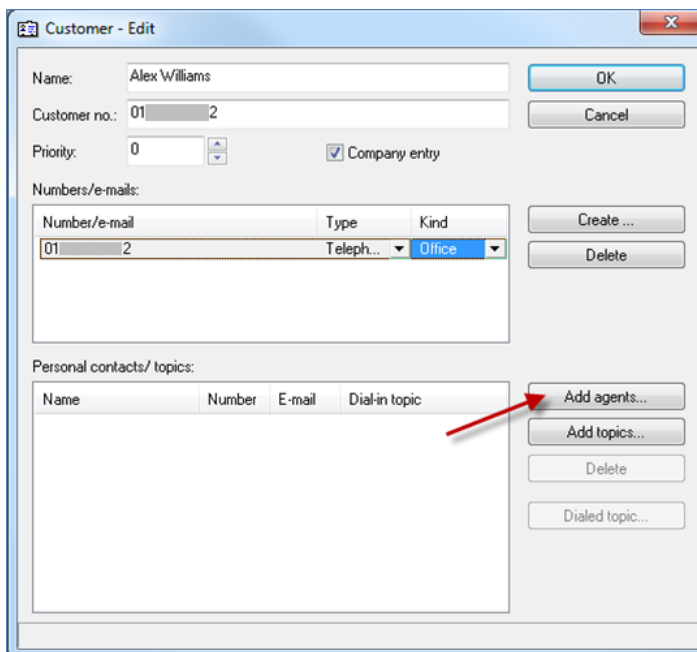
Number/e-mail	Type	Kind
01	2	Teleph...

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic
------	--------	--------	---------------

Buttons: OK, Cancel, Create ..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

13. To add an agent as a Personal Contact click the **Add Agents** button.



**Customer - Edit**

Name: Alex Williams

Customer no.: 01 2

Priority: 0 ☒ Company entry

Numbers/e-mails:

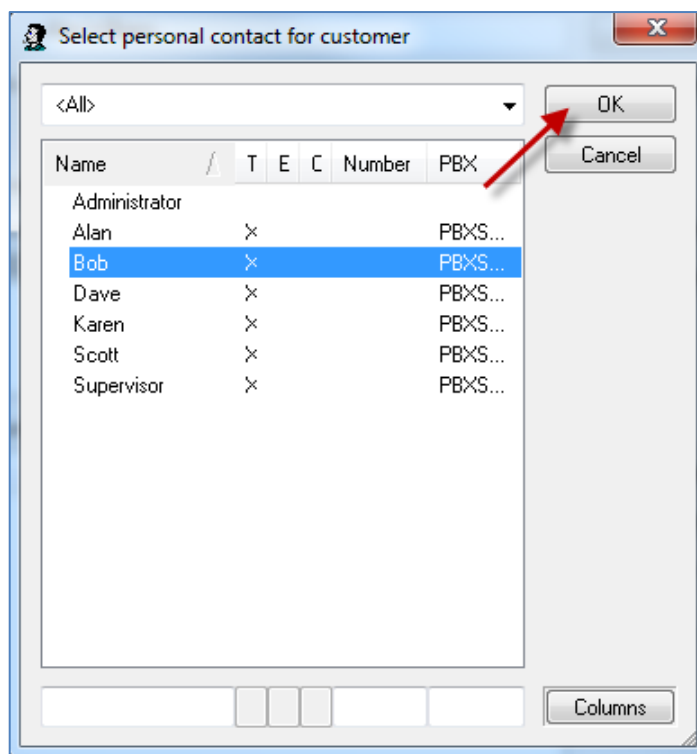
Number/e-mail	Type	Kind
01	2	Teleph...

Personal contacts/ topics:

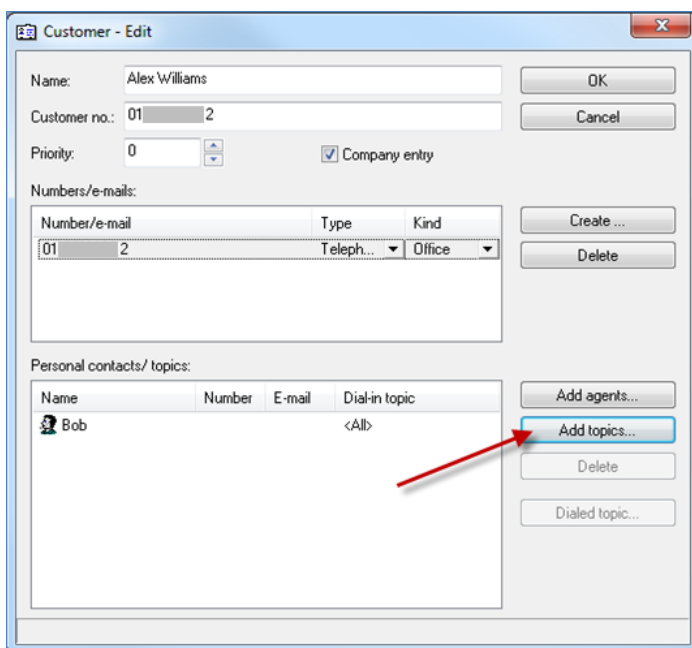
Name	Number	E-mail	Dial-in topic
------	--------	--------	---------------

Buttons: OK, Cancel, Create ..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

14. Select the required agent and click the **OK** button.



15. To add a Topic as a Personal Contact, click the **Add Topics** button.



16. Select the required Topic and click the OK button.

**Customer - Edit**

Name: Alex Williams

Customer no.: 01 2

Priority: 0 ☒ Company entry

Numbers/e-mails:

Number/e-mail	Type	Kind
01 2	Teleph...	Office

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic
Bob			<All>

Buttons: OK, Cancel, Create..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

17. To add an Dialed Topic as a Personal Contact, select the Topic or Agents that has previously been assigned as Personal Contacts.

**Customer - Edit**

Name: Alex Williams

Customer no.: 01 2

Priority: 0 ☒ Company entry

Numbers/e-mails:

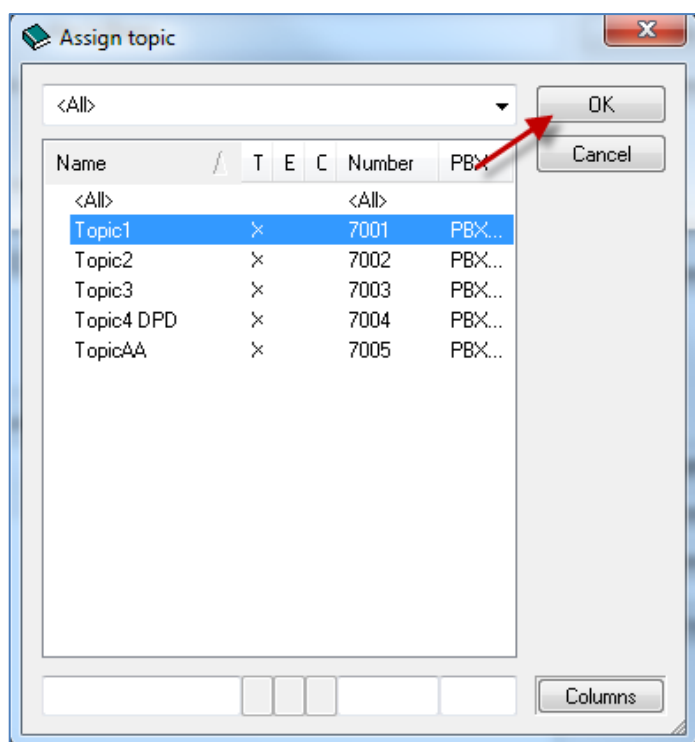
Number/e-mail	Type	Kind
01 2	Teleph...	Office

Personal contacts/ topics:

Name	Number	E-mail	Dial-in topic
Bob			<All>

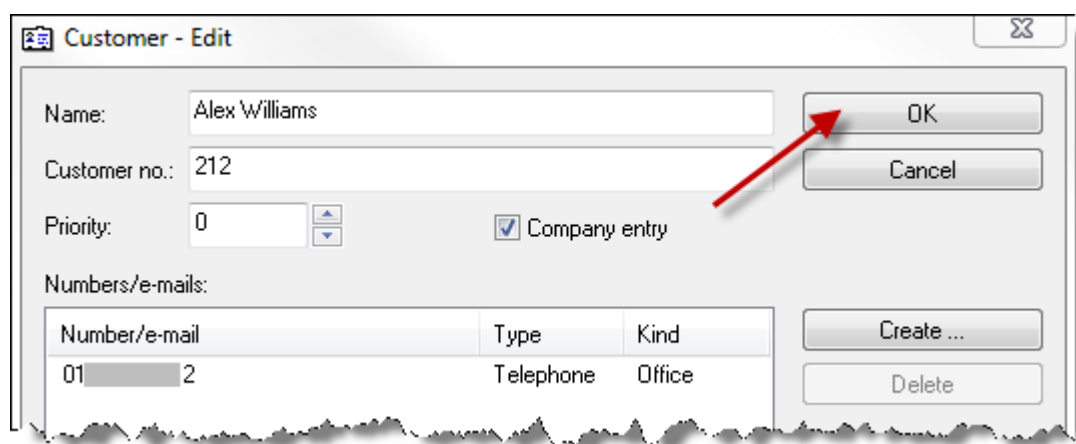
Buttons: OK, Cancel, Create..., Delete, Add agents..., Add topics..., Delete, Dialed topic...

18. Then click the **Dialed topic** button and click the Dialed Topic to be added to the Personal Contact record and click the **OK** button.



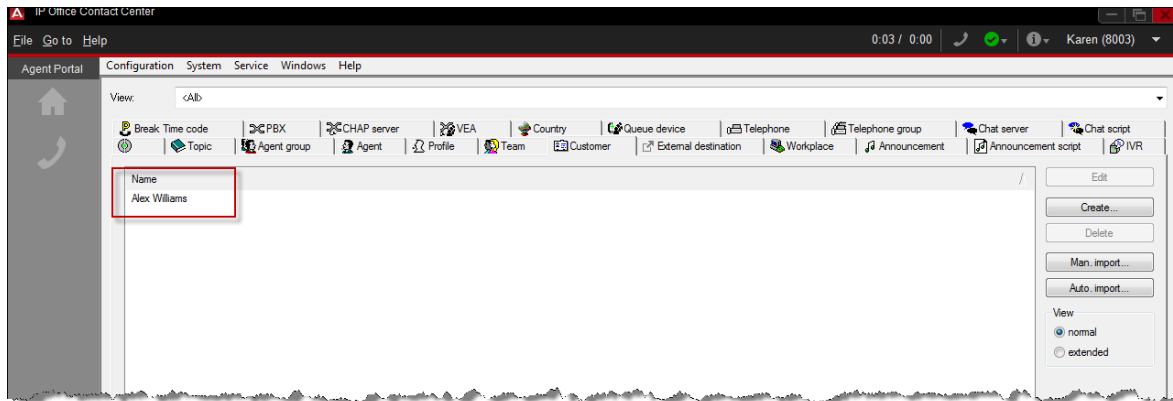
19. In this example, the customer's calls are only routed to agent 'Bob' when the customer calls into Topic1, for calls to the other topics the customer would be routed to an agent group.

20. Click the **OK** button.



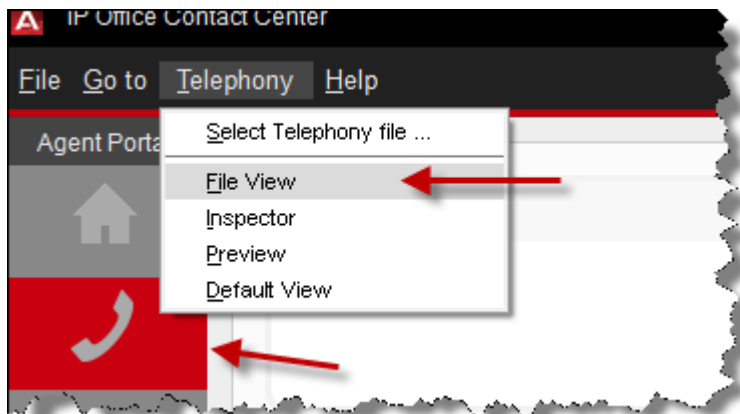
21. The new contact is displayed.



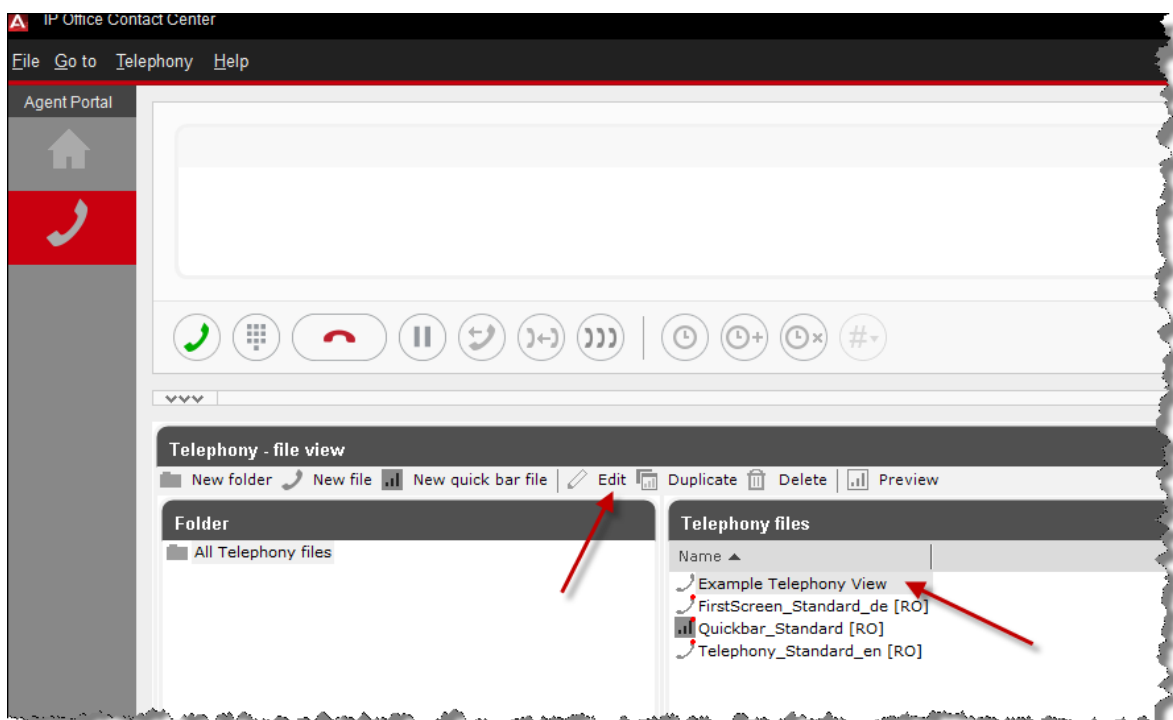


The Call Tags can now be added to the Telephony View.

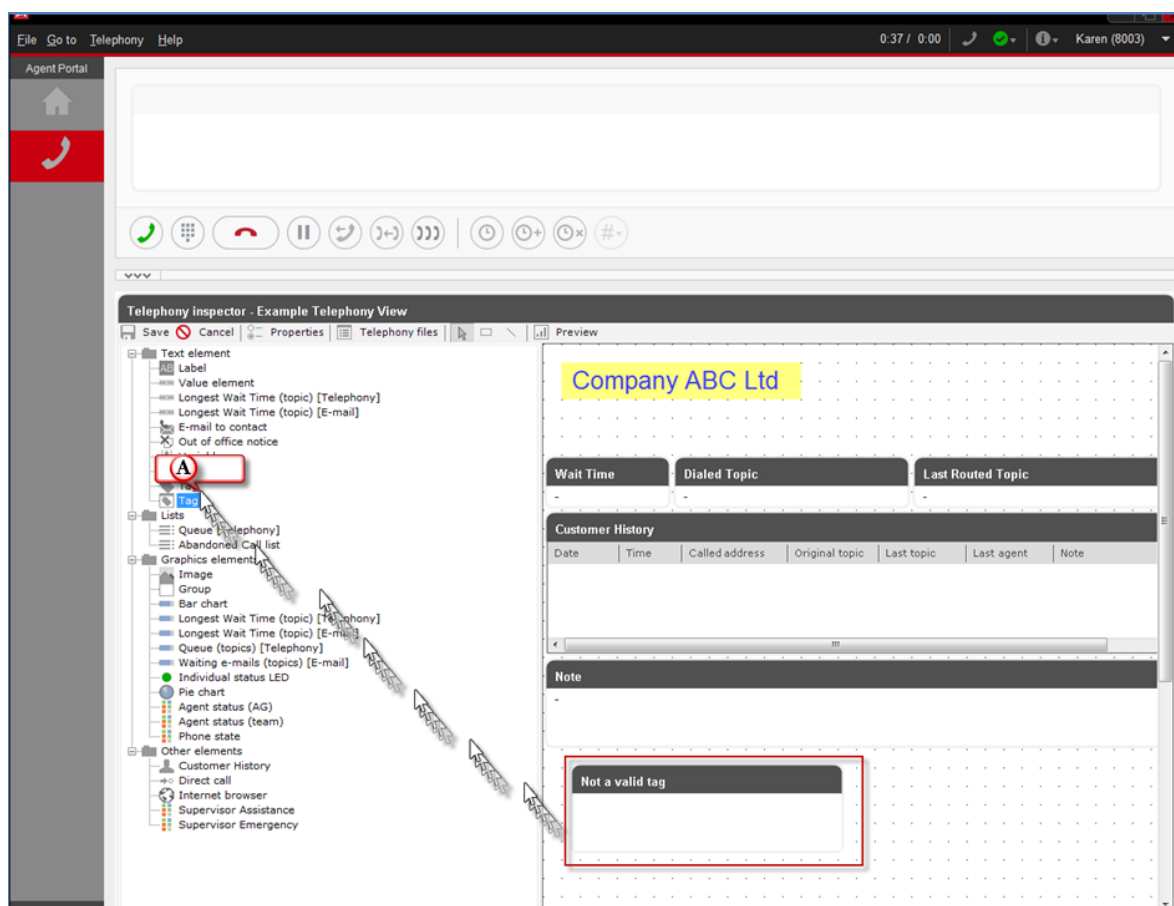
22. From the menu bar select **Telephony** followed by **File View**.



23. Select the duplicated file to be edited, and then click the **Edit** button.

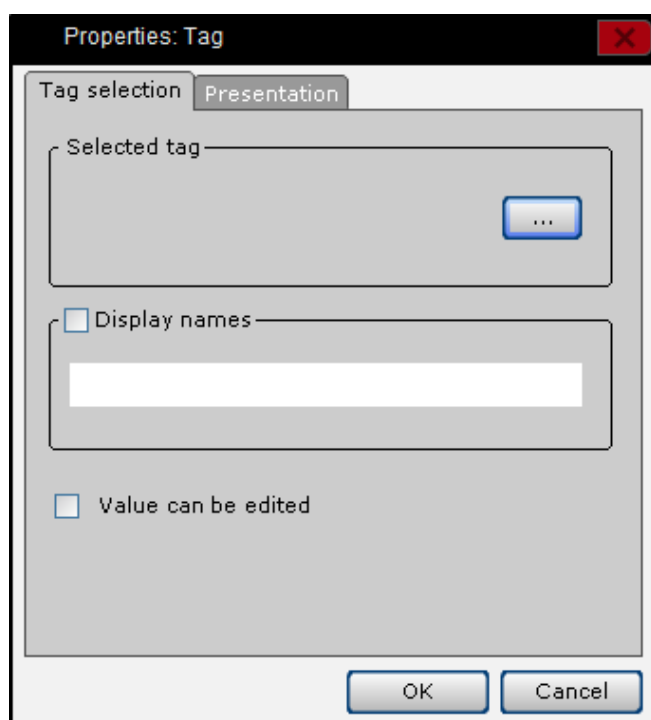


24. Click the **Tag** (Window Display) element, and drag it onto the working area.

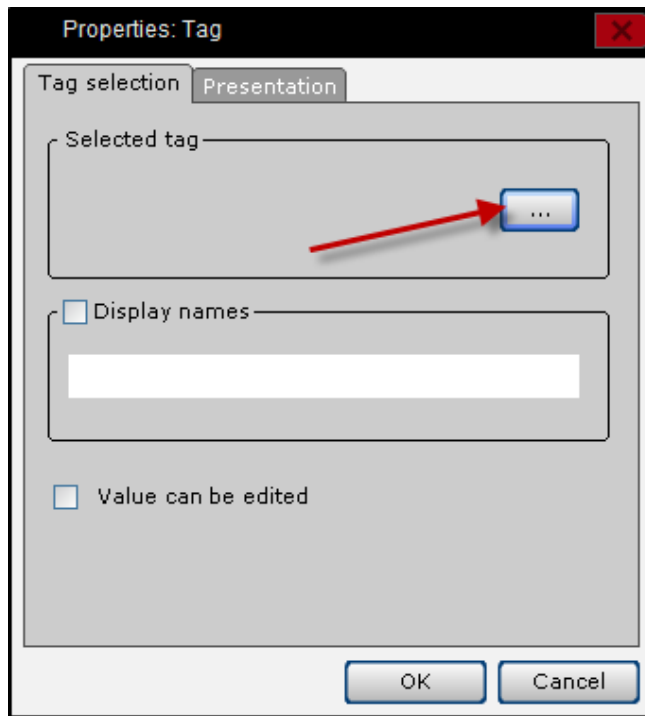


A. Click and drag

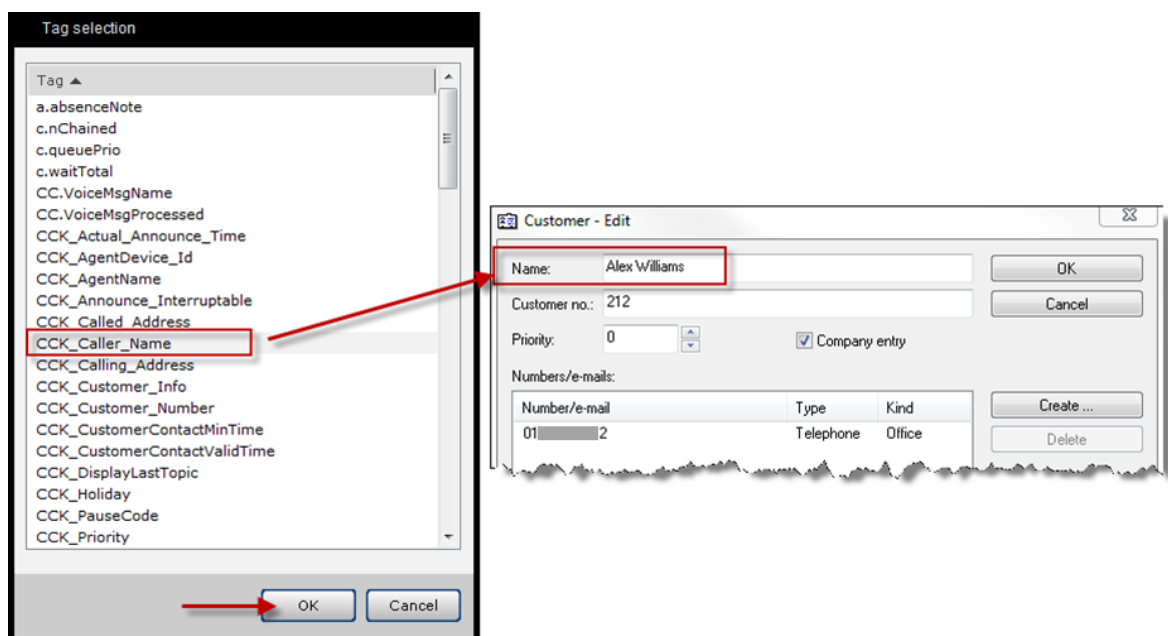
25. When the Tag element is placed on the workspace, a dialogue box automatically opens.



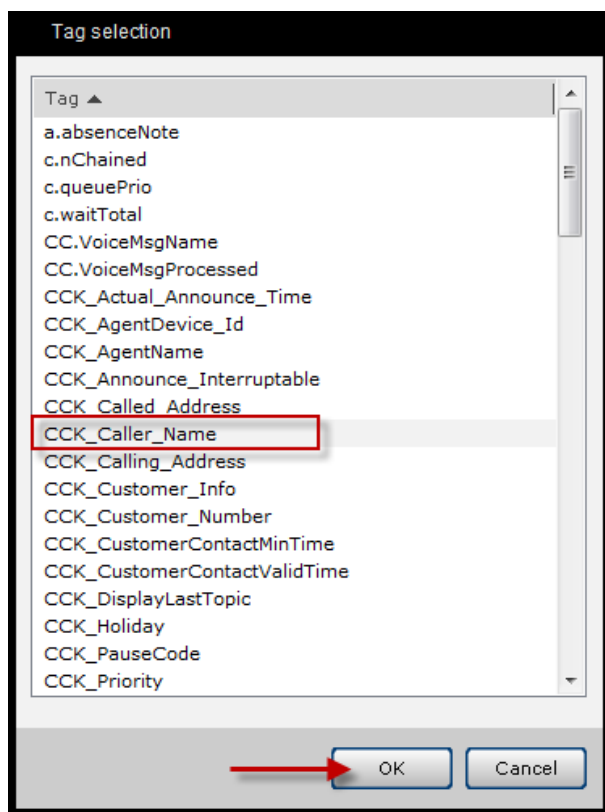
26. Click the browser button.



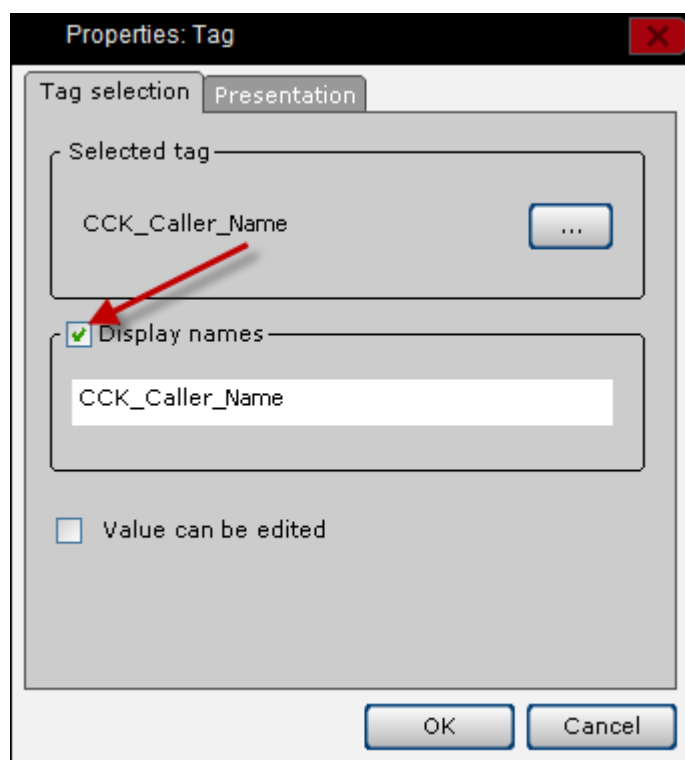
27. A list of available Tags is displayed. In this example, the **CCK Caller Name** will be used. This will display the customer's name when it is recognized against a customer record.



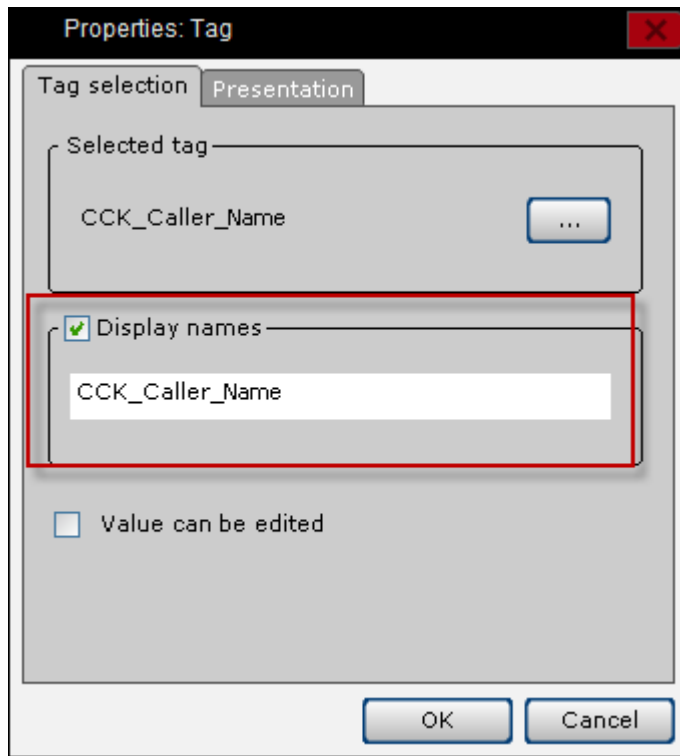
28. Click the **OK** button.



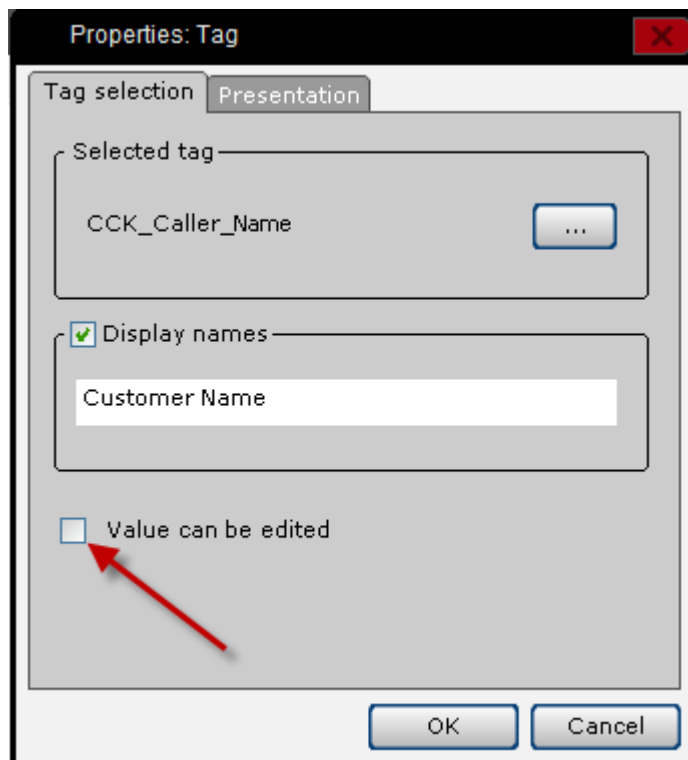
29. Click the **Display Names** checkbox.



30. The default name is displayed.

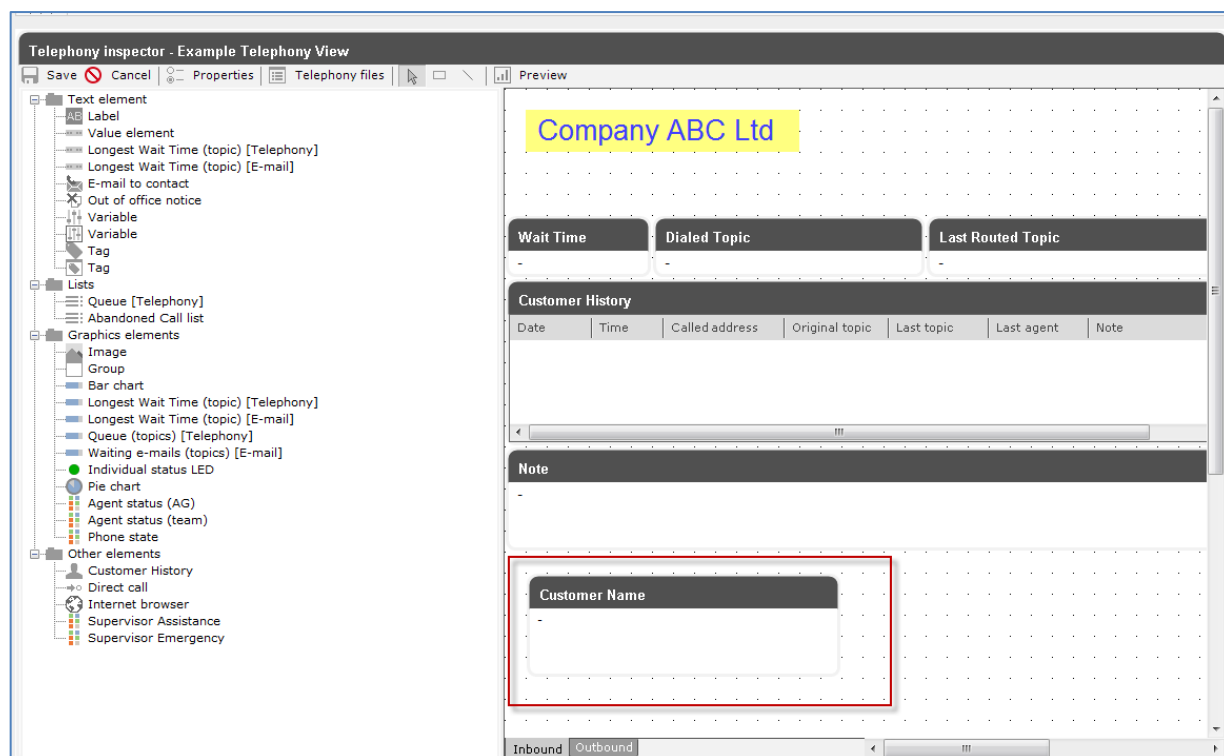


31. You can determine whether this value can be edited by selecting/deselecting the **Value can be edited** check box.

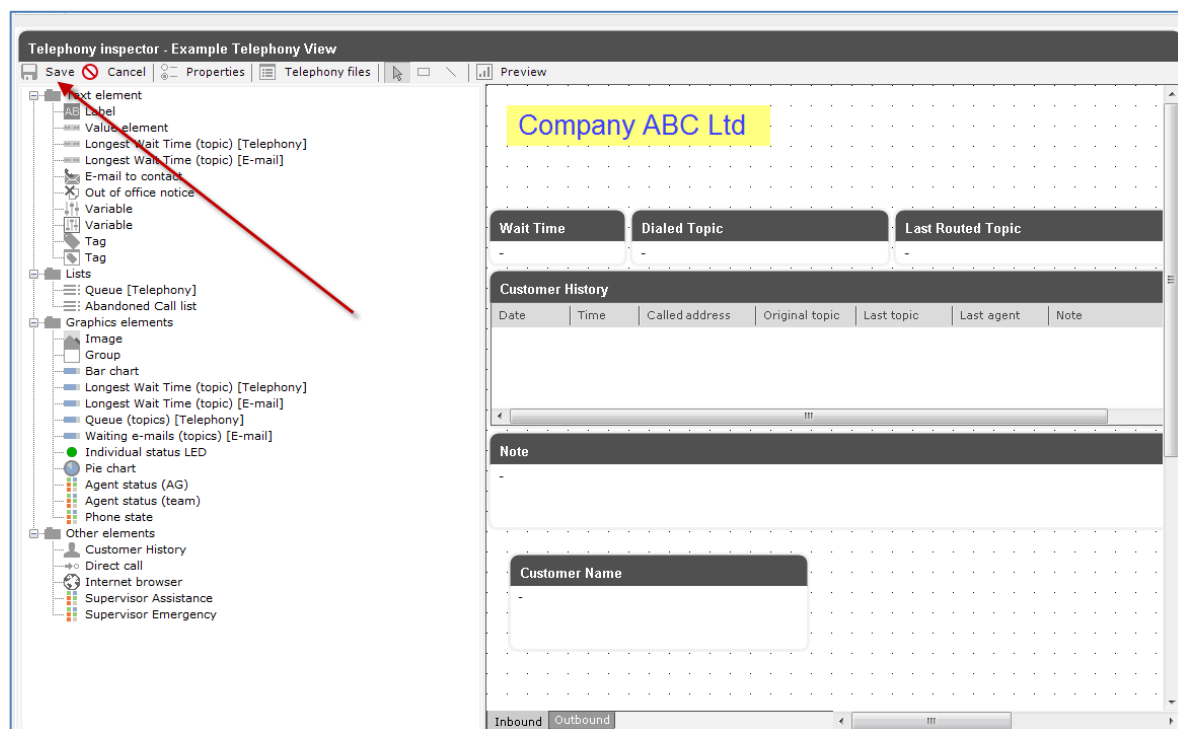


32. Click the **OK** button.

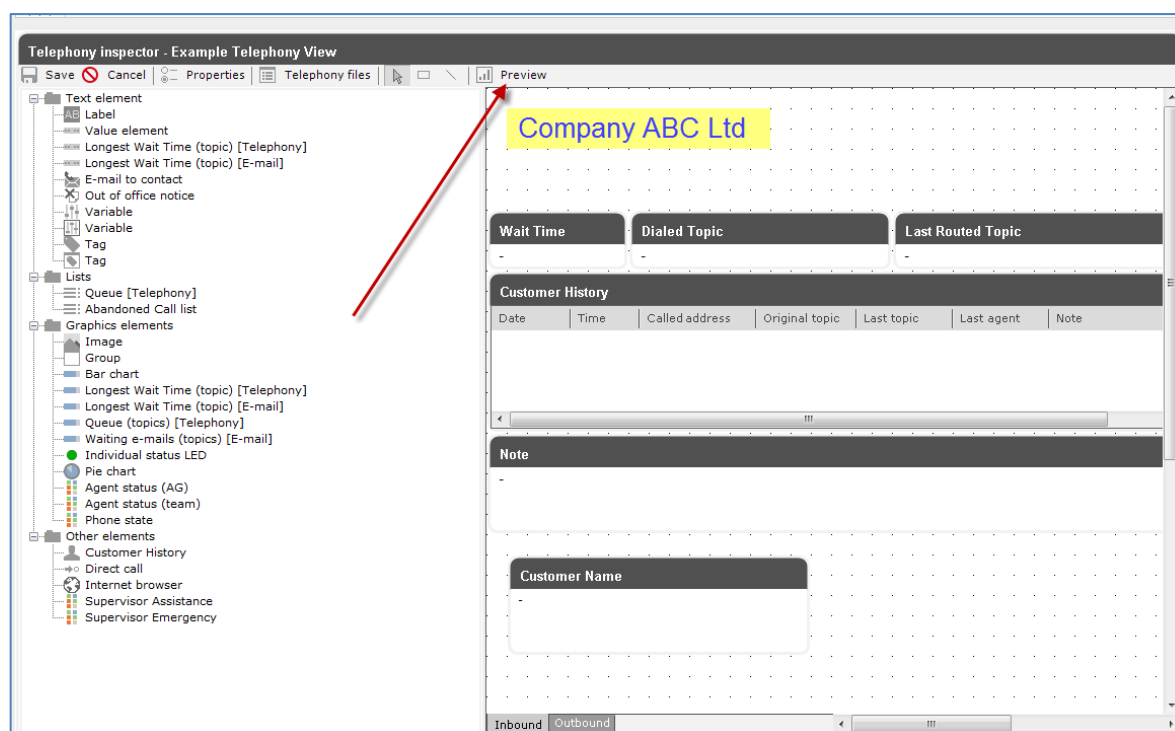
33. The configured Tag is displayed in the working area.



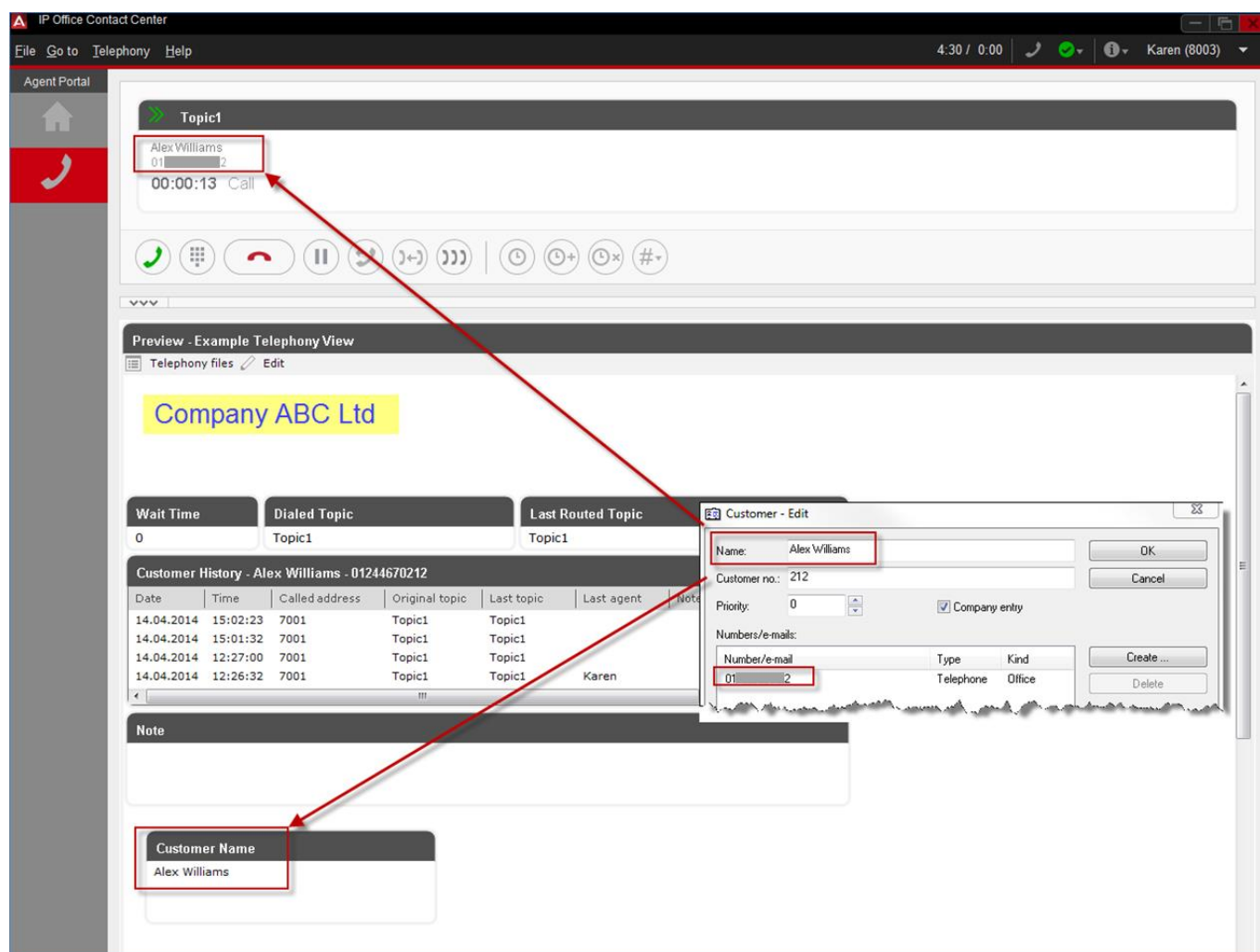
34. Click the **Save** button.



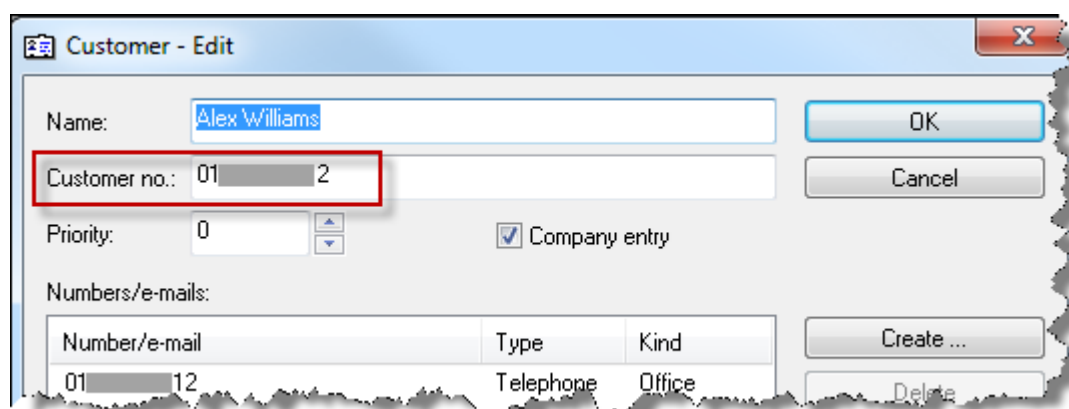
35. To preview the changes, click the **Preview** button.



36. The preview page is displayed. When the customer calls and their details are recognized as a customer record, their name will be displayed.

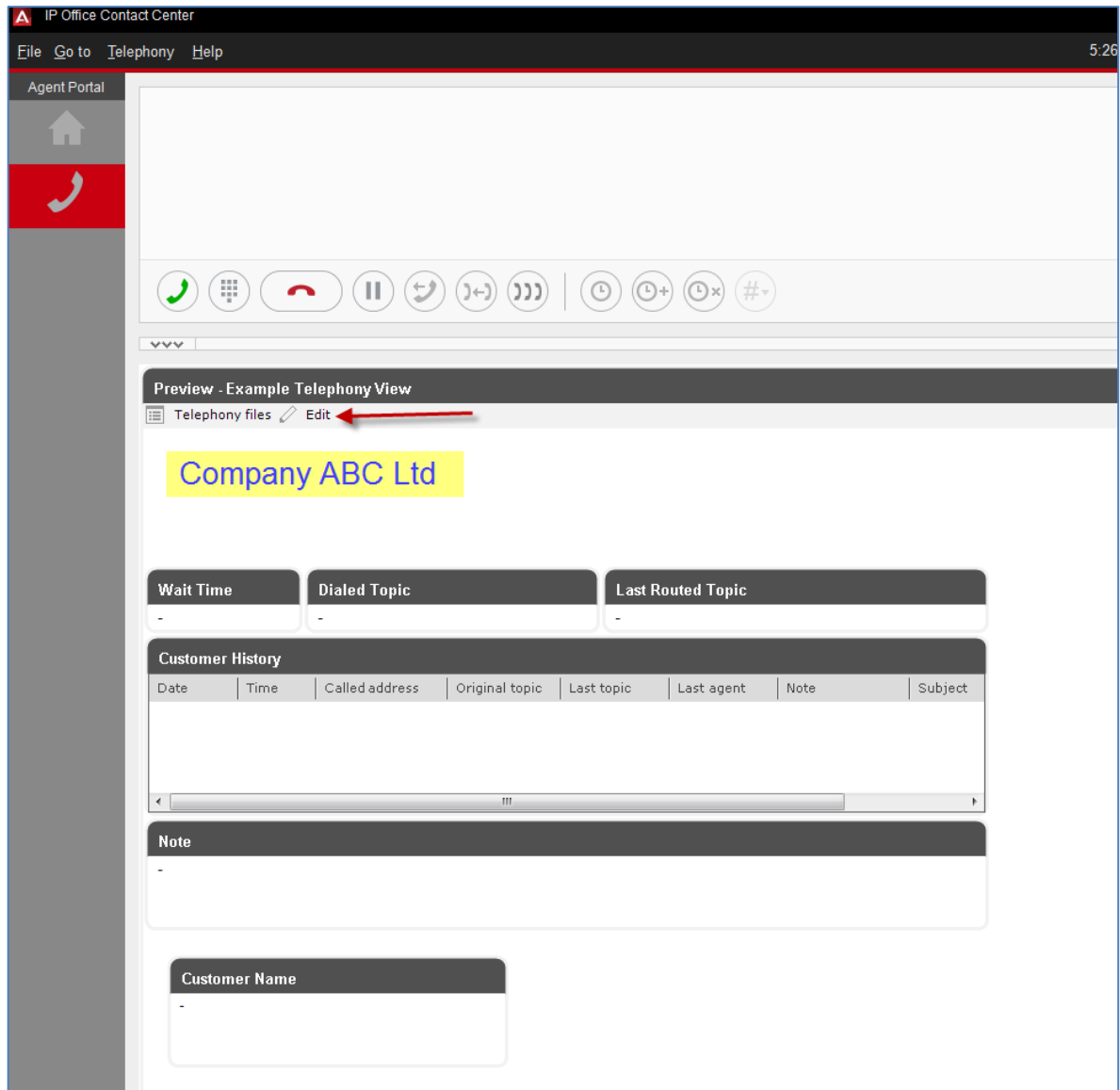


37. In the example below, a tag will be created to reference the customer number that was created earlier.

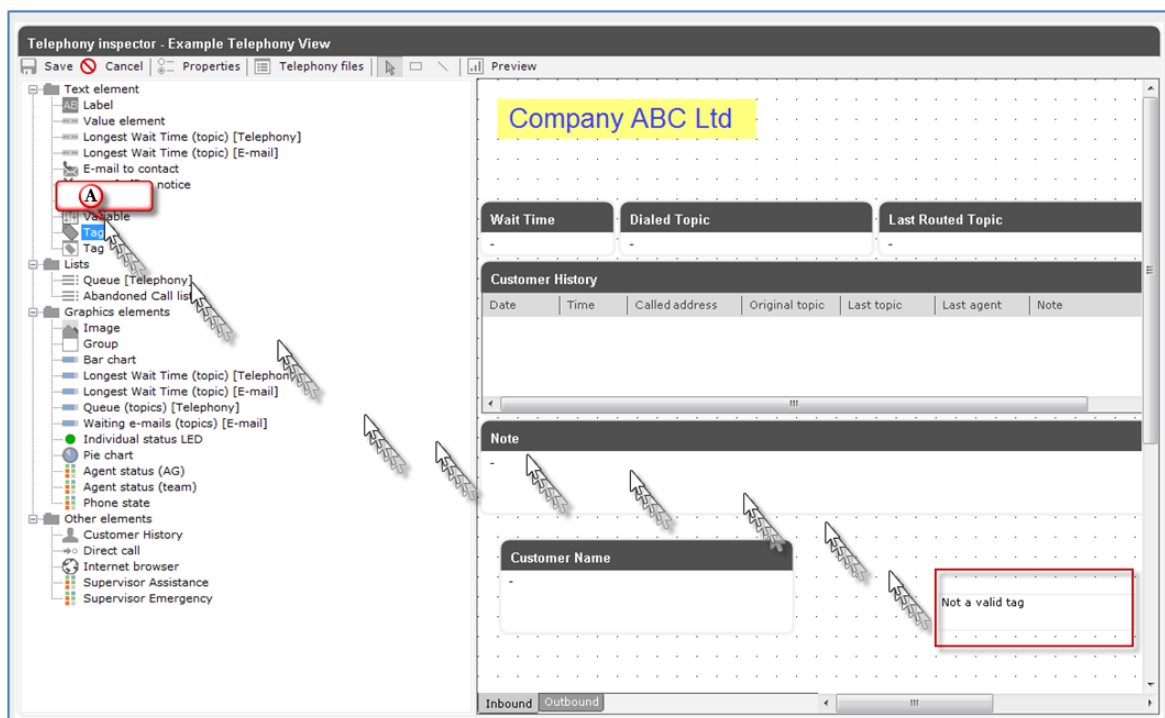


38. Click the **Edit** button to access the **Telephony Inspector** view.



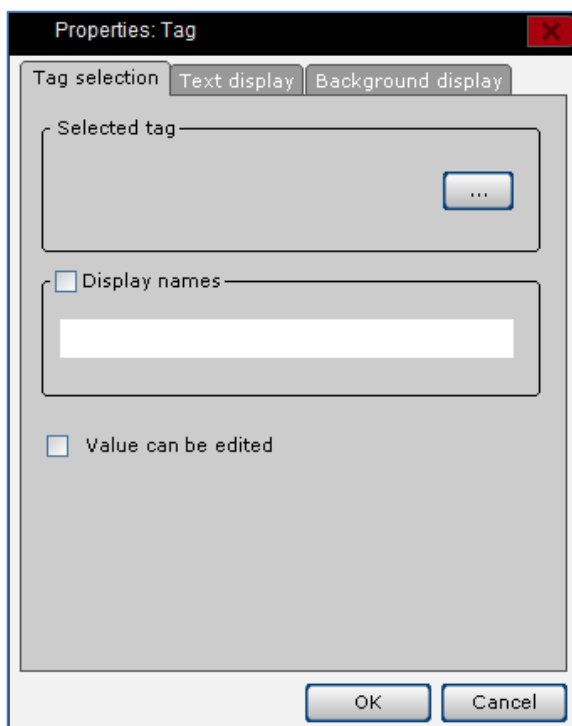


39. Select the **Tag (In Line Display)** element and drag it onto the working area.

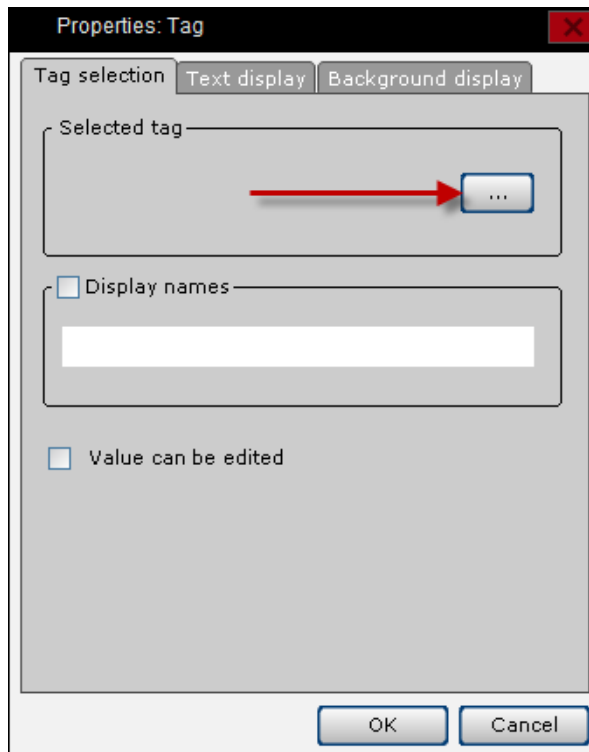


A. Click and drag.

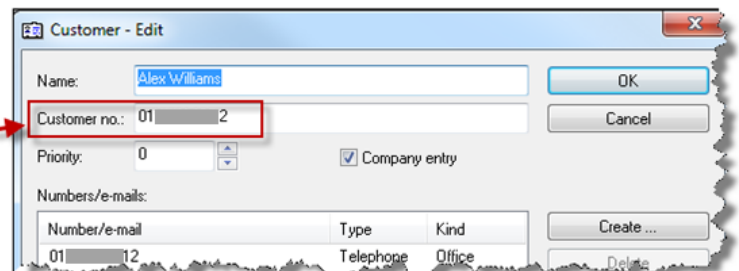
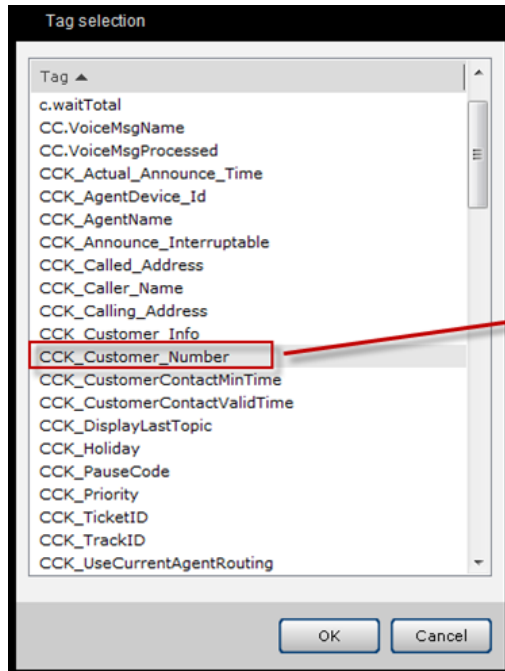
40. When the Tag element is placed on the workspace, a dialogue box automatically opens.



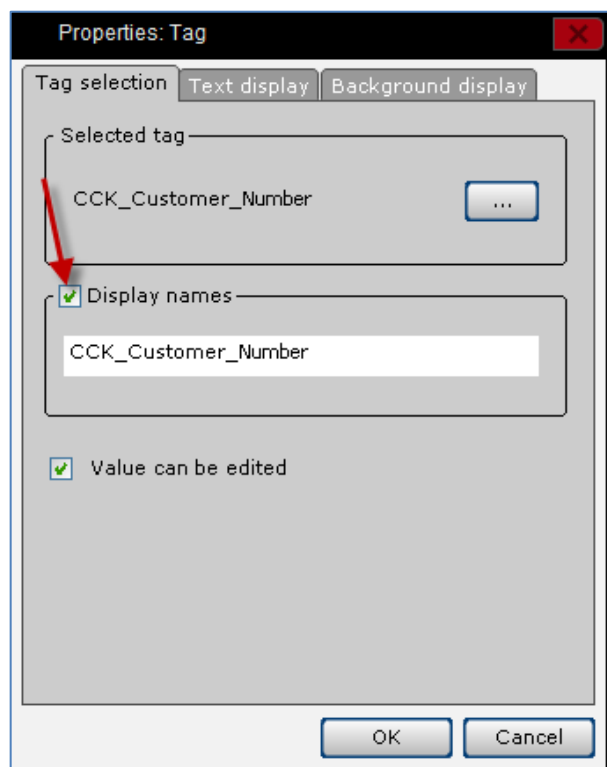
41. Click the browser button.



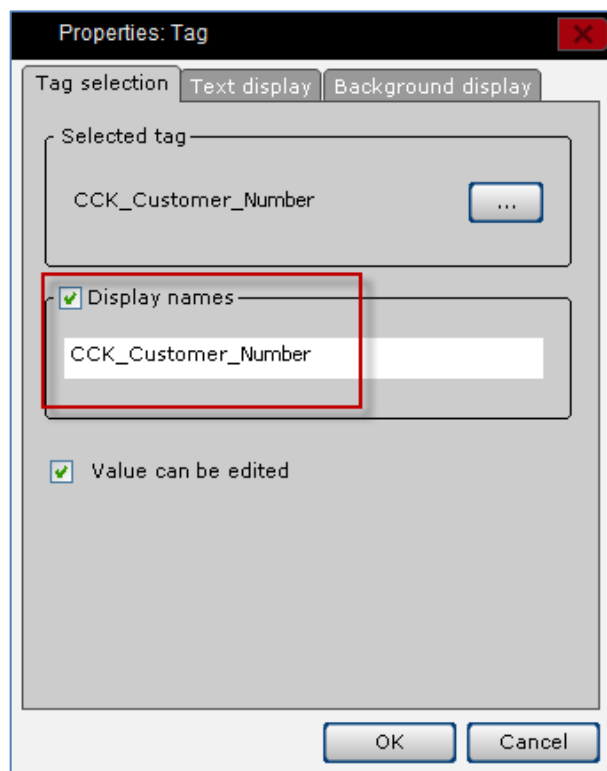
42. A list of available Tags is displayed. In this example, the **CCK\_Customer\_Number** tag will be used. This will display the customer number when it is recognized against a customer record.



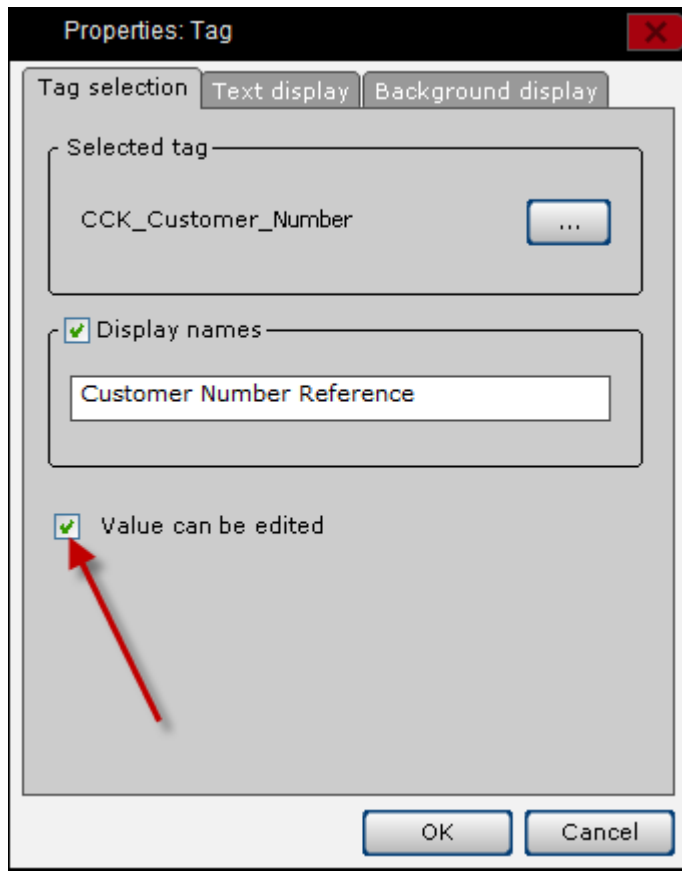
43. Click the **Display Names** checkbox.



44. The default name is displayed; this can be edited as required.

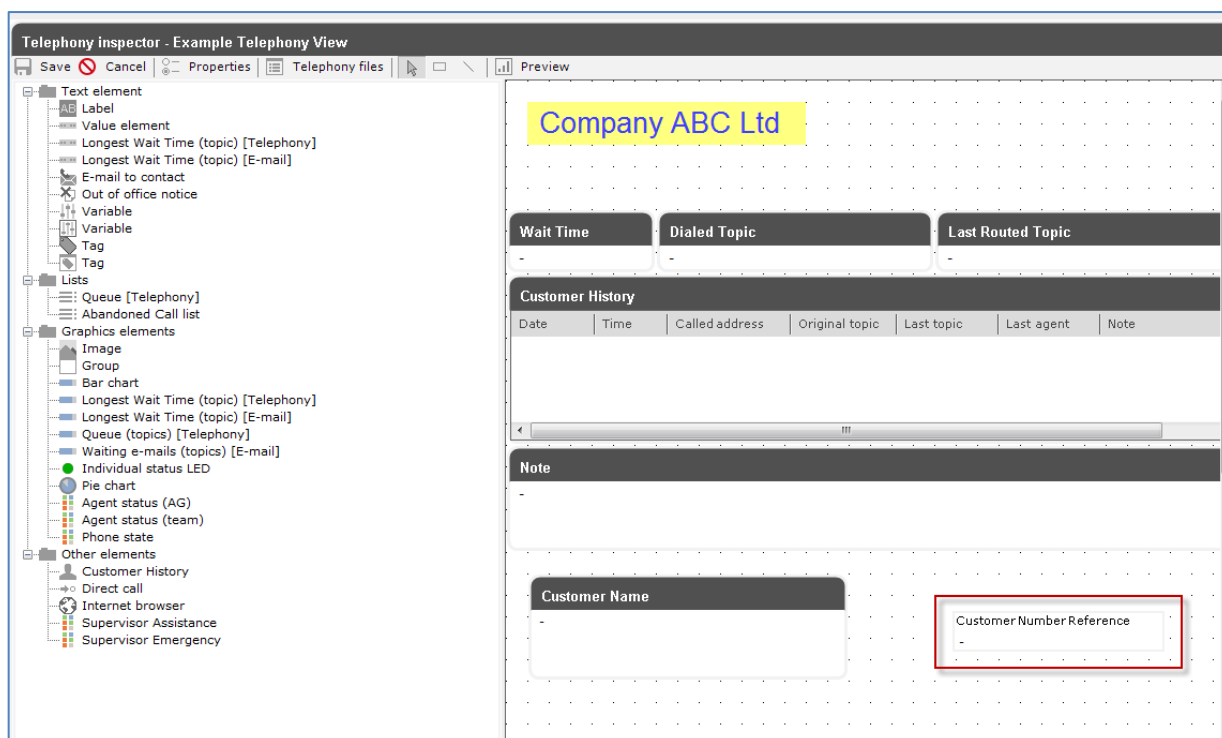


45. You can determine whether this value can be edited by selecting/deselecting the **Value can be edited** check box.

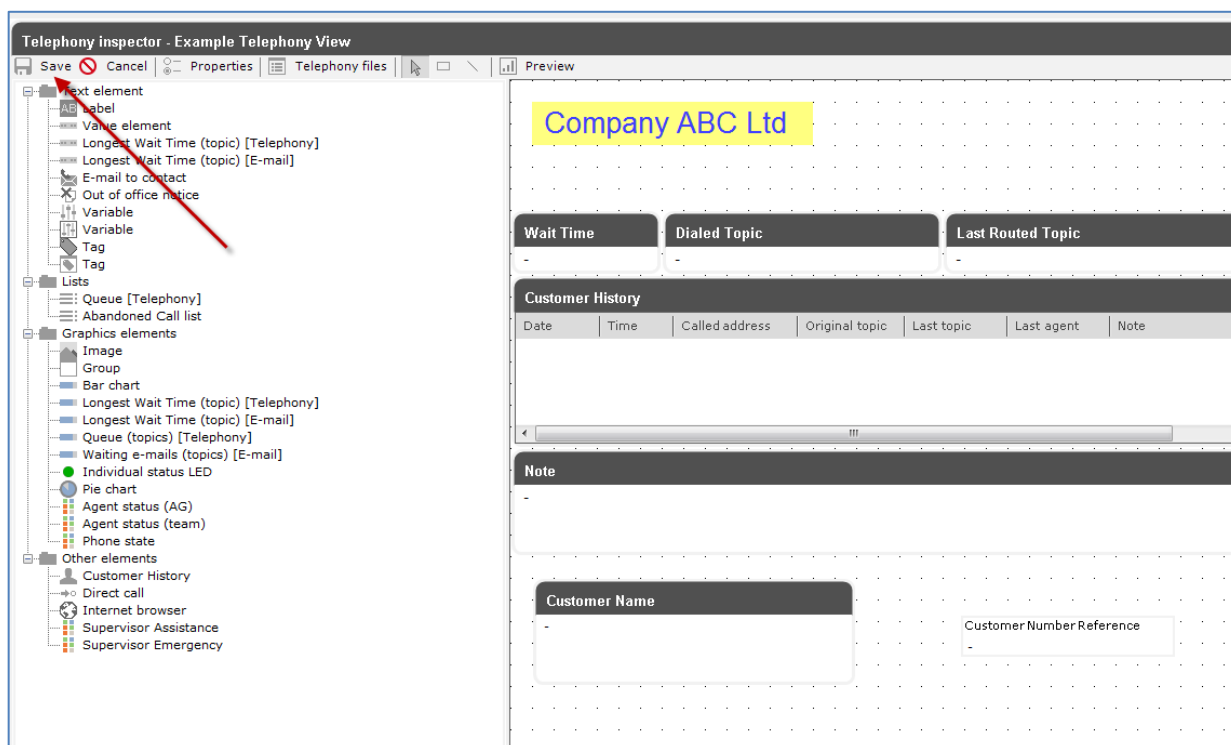


46. Click the **OK** button.

47. The configured Tag is displayed in the working area.

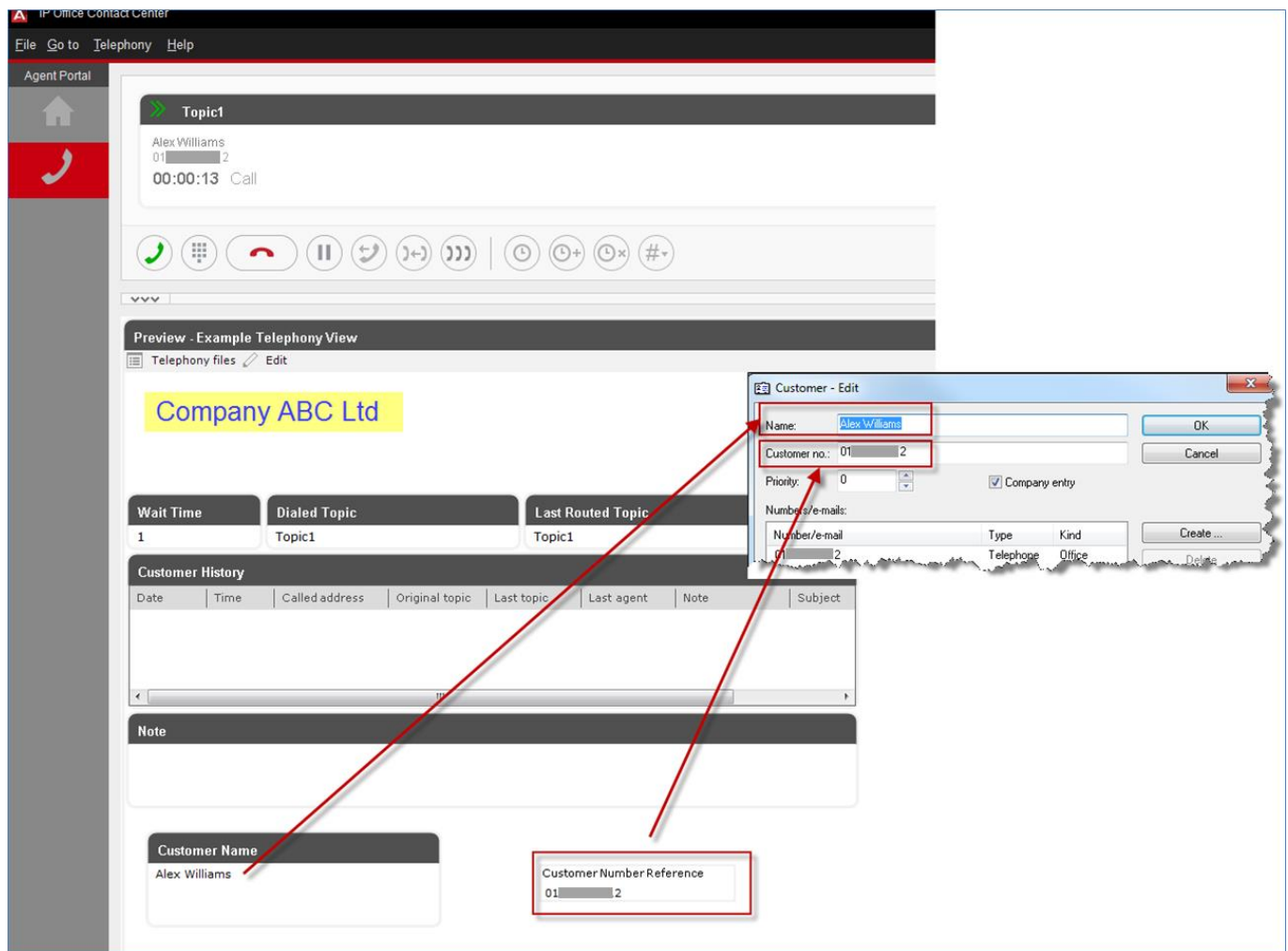


48. Click the **Save** button.



49. To preview the changes, click the **Preview** button.

50. The preview page is displayed. When the customer calls and their details are recognized as a customer record, their Customer Number will be displayed.



51. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## List Elements

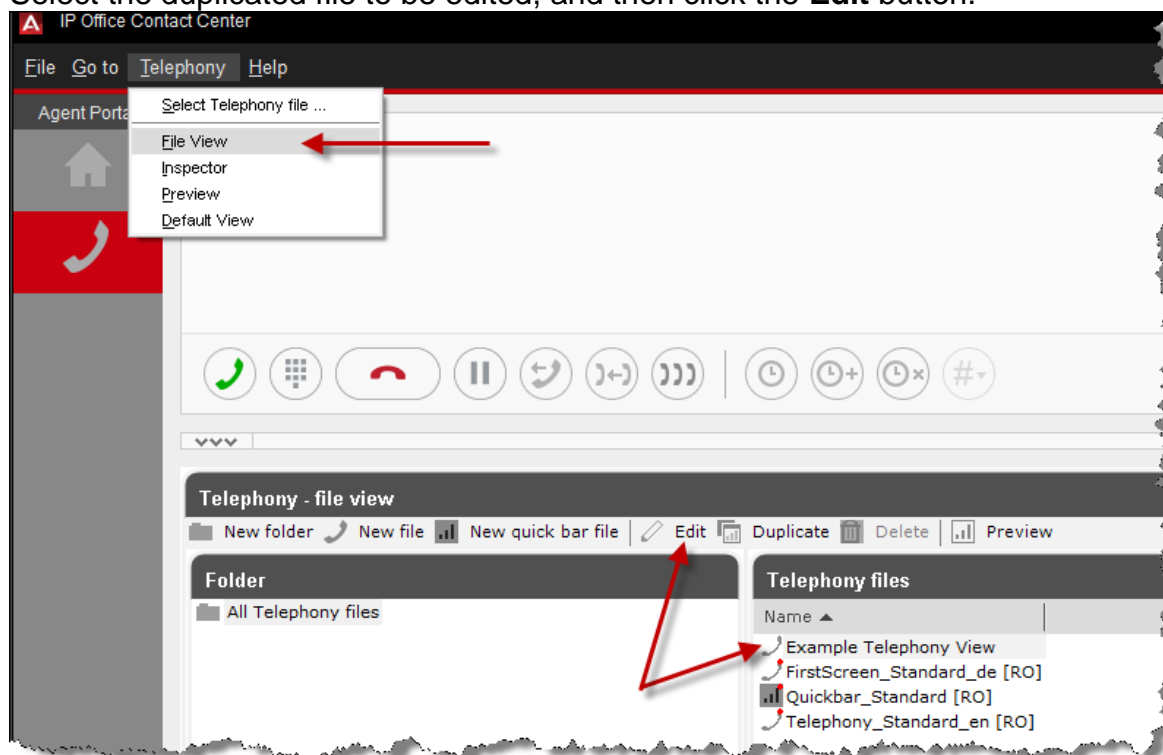
Lists can be added to the Telephony View. The lists available for selection are:

- Queue (Telephony) – When a call is queued and an agent is not available to answer a call, the list can be configured to display details relating to for example, to the Customer's Number, the dialed Topic, the connected announcement type (interruptible/ non interruptible), the line number, the Time the call has been in the Topic, the Time the call has been in its current state and the announcement script in use.
- Queue Abandoned Call List

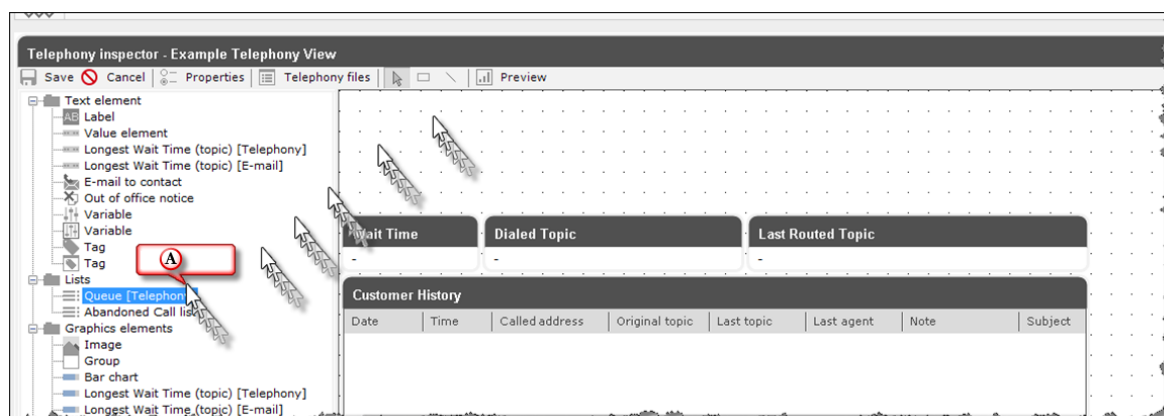
## Queue (Telephony)

To add a Queue List Element to the Telephony View:

1. Select the duplicated file to be edited, and then click the **Edit** button.



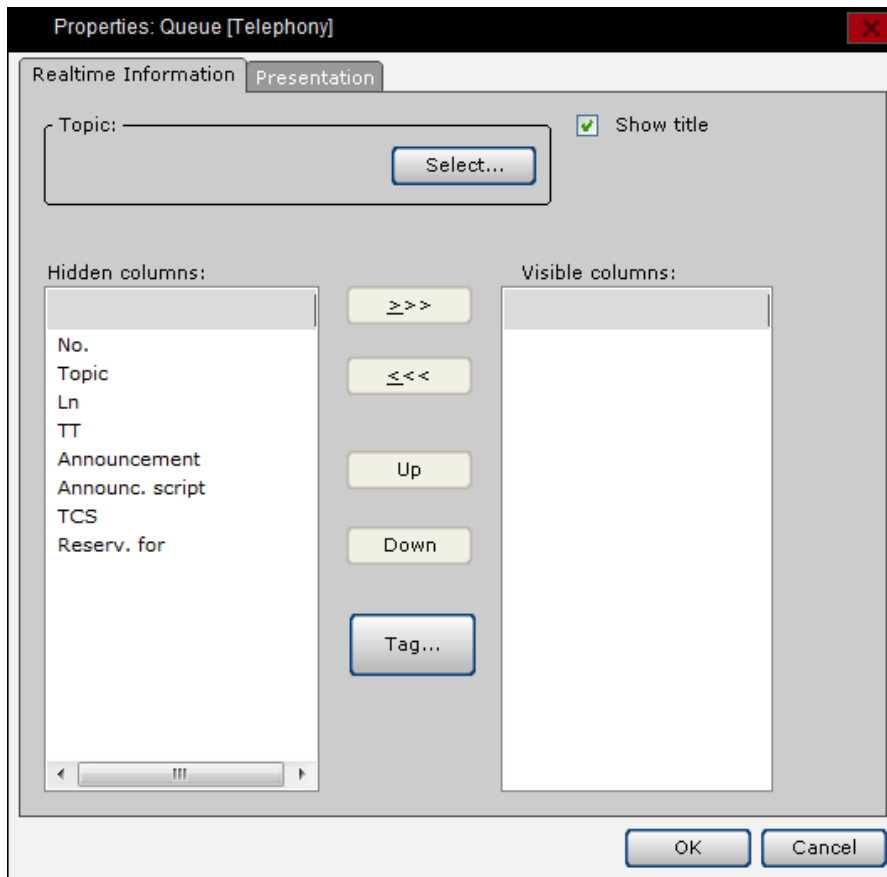
2. Click and drag the **Queue List Element** to the working area.



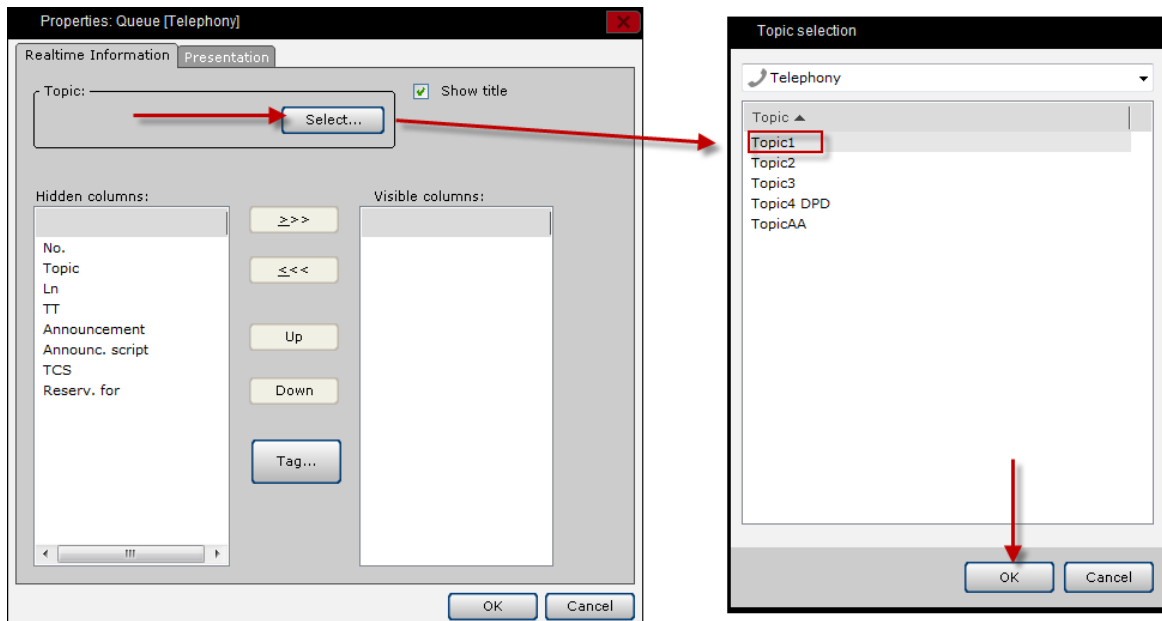
- A. Click and drag.

3. The **Properties** dialogue box for the Queue Element is displayed.

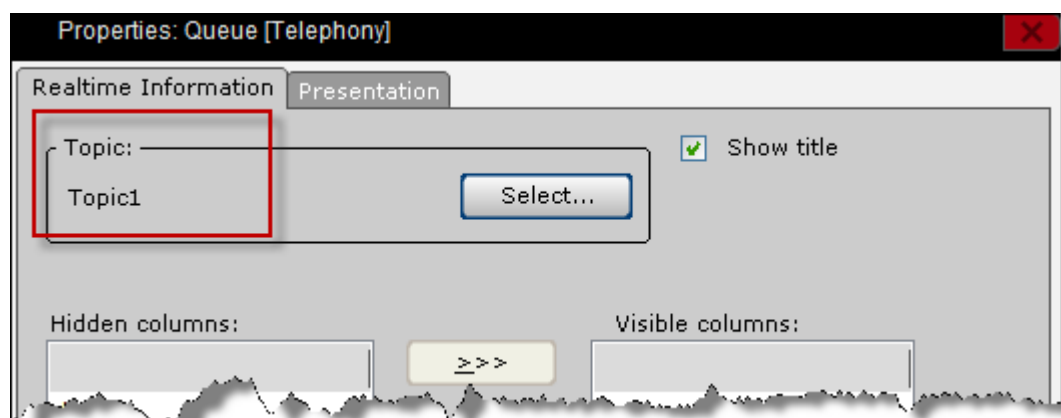




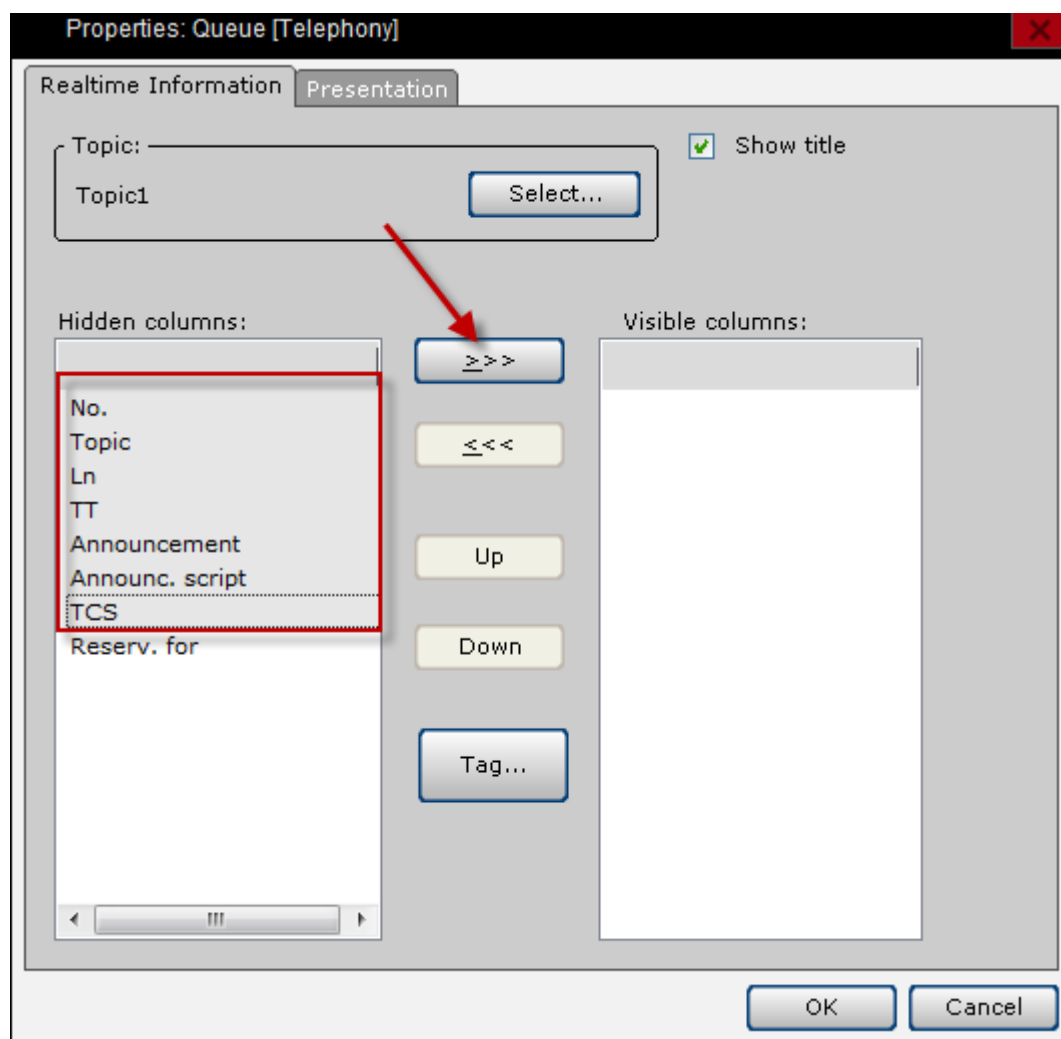
4. Click the **Select** button, and then click on the **Topic** to be utilized. Click the **OK** button.



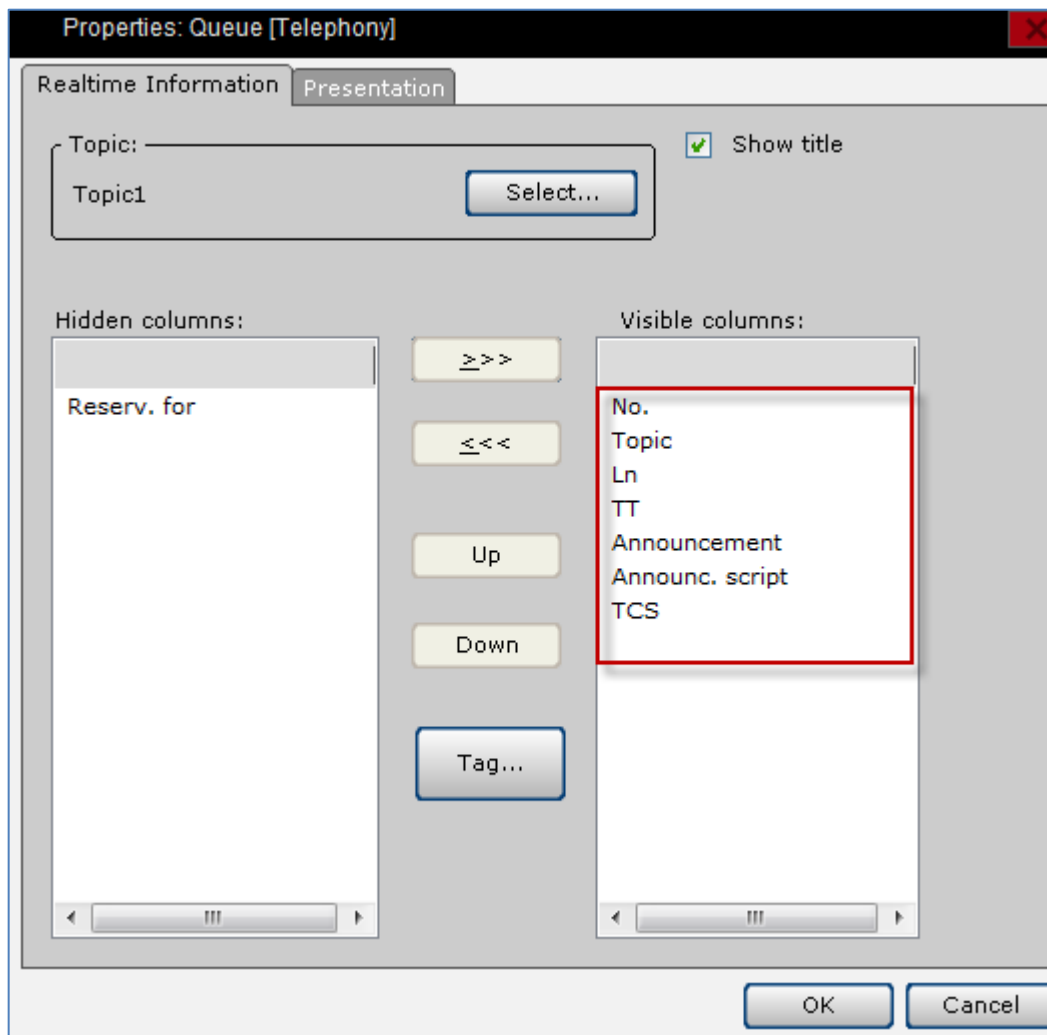
5. The selected Topic is displayed.



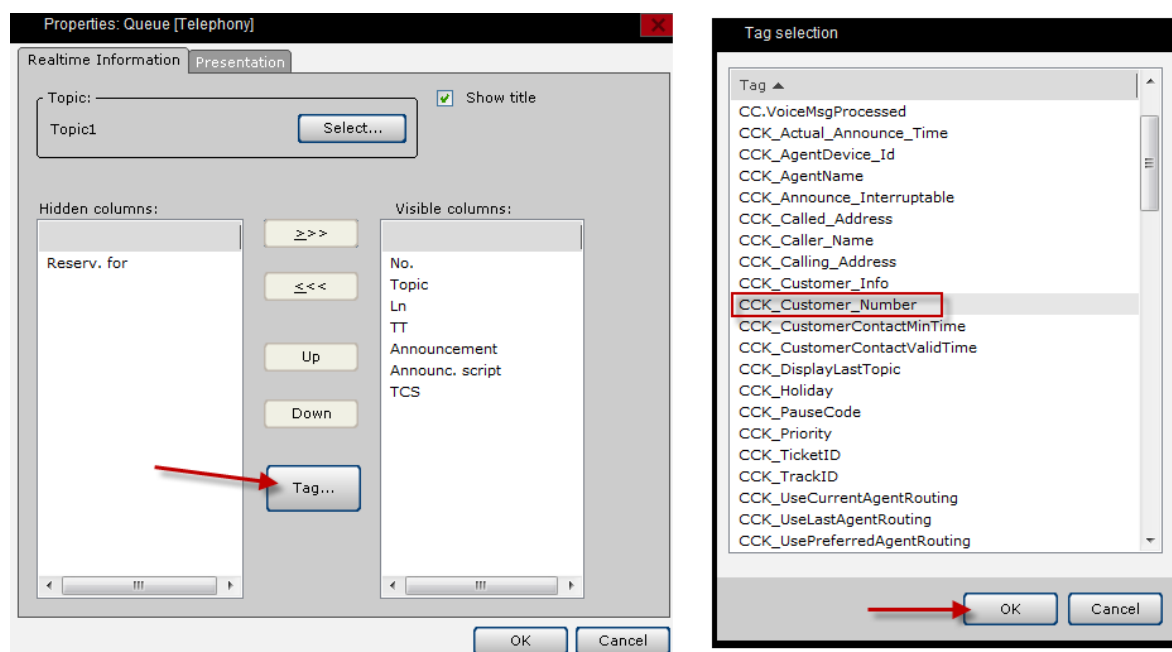
6. The column information that is to be displayed in the Queue List can be selected from the **Hidden Columns** panel and moved to the **Visible Columns** panel, by selecting the required column and clicking the right facing arrow button. (Hold Down the keyboards Ctrl key to select multiple items).



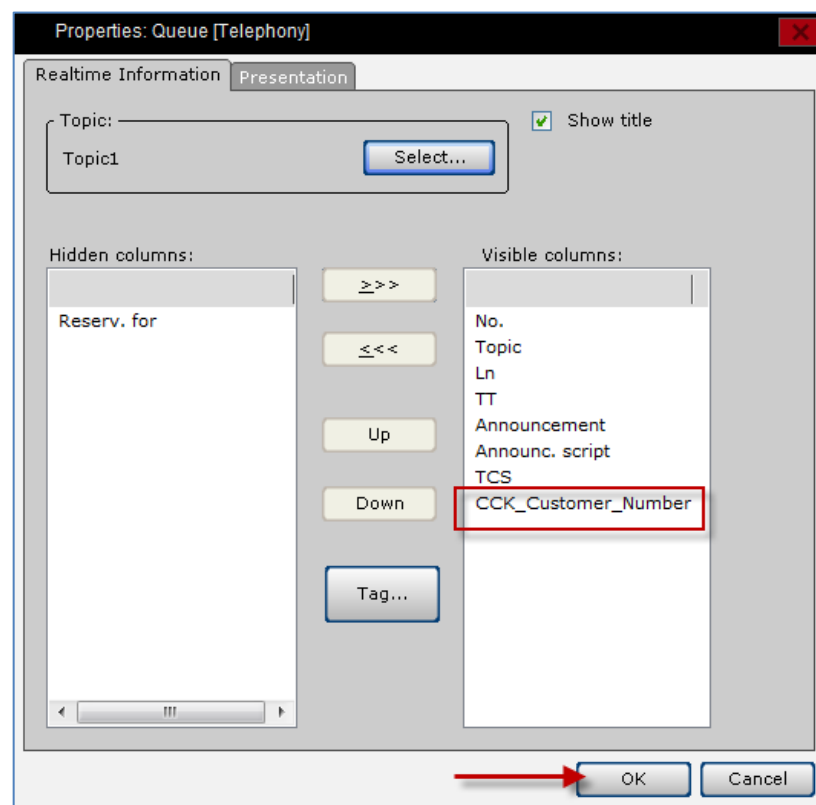
7. The selected items are moved to the **Visible Columns** panel.



8. A tag can also be added, for example to display the name of the caller as created in a Customer Record. To add a Tag, click the **Tag** button and select the required Tag to be utilized. Then click the **OK** button.

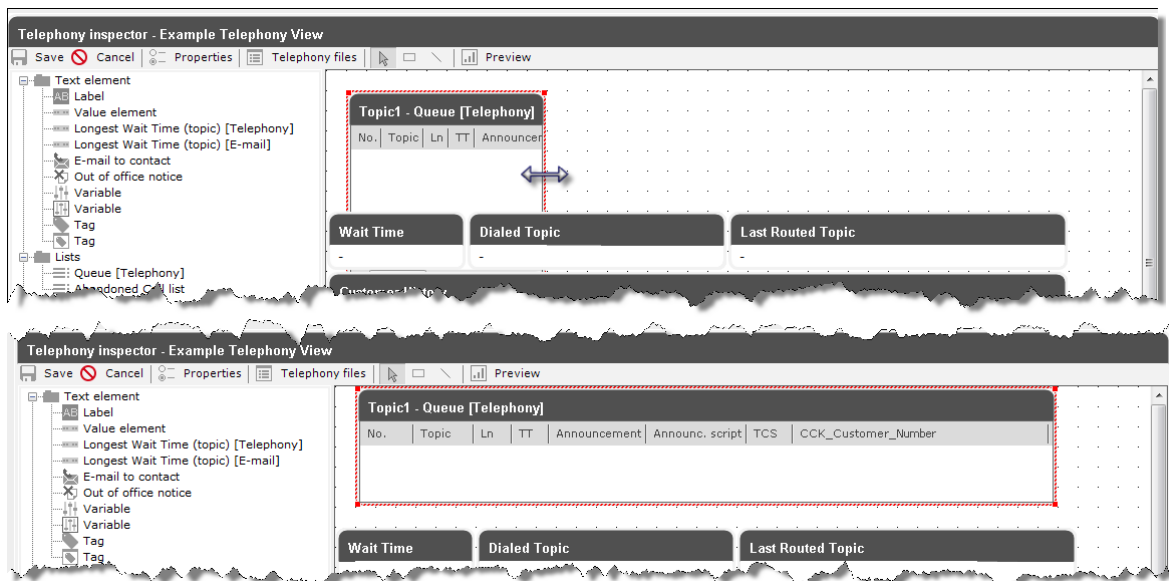


9. The selected tag is added to the **Visible Columns** panel. Click the **OK** button.

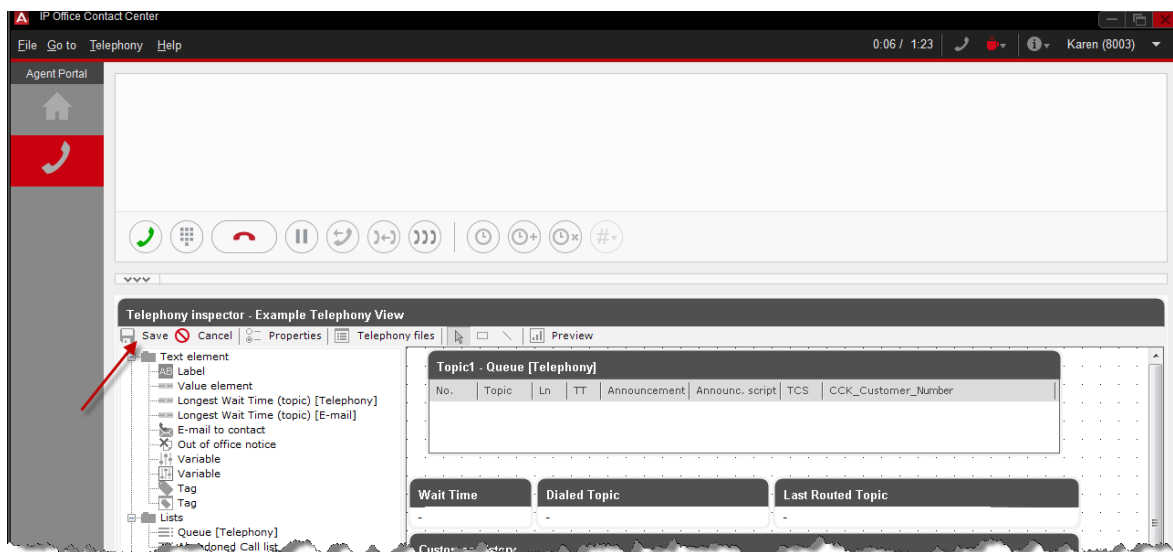


**Note:** The order that the parameters are displayed can be adjusted by selecting the parameter and clicking the **Up** and **Down** buttons.

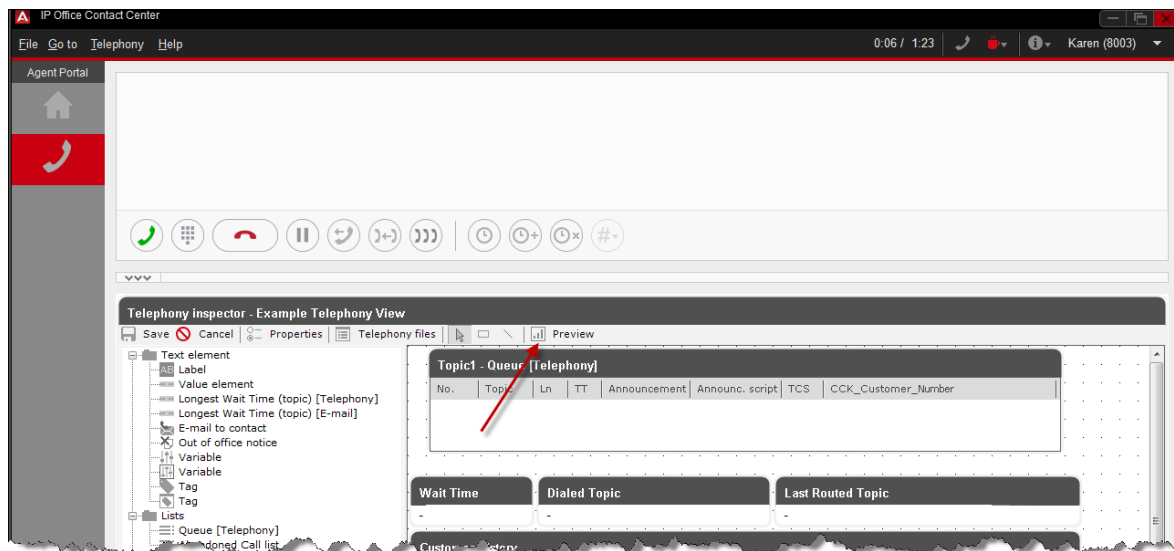
10. The configured element is displayed in the Working Area. To adjust the size of the element, click the element so that its red border is displayed. Then click on the red border and expand it to the required size.



11. Click the **Save** button.



12. To preview the configured changes, click the **Preview** button.



13. The preview page is displayed. When a customer's call is presented to the topic and no agent's area available to answer the call, the call will queue. The configured call data within the Queue list is displayed.



- A. Caller's number
- B. Dialed in Topic
- C. Not Supported
- D. Connected Announcement type, none, none interruptible, interruptible
- E. Agent is in "Break Time" status
- F. Time in Topic
- G. Announcement's Name
- H. Time in Current State
- I. Tag

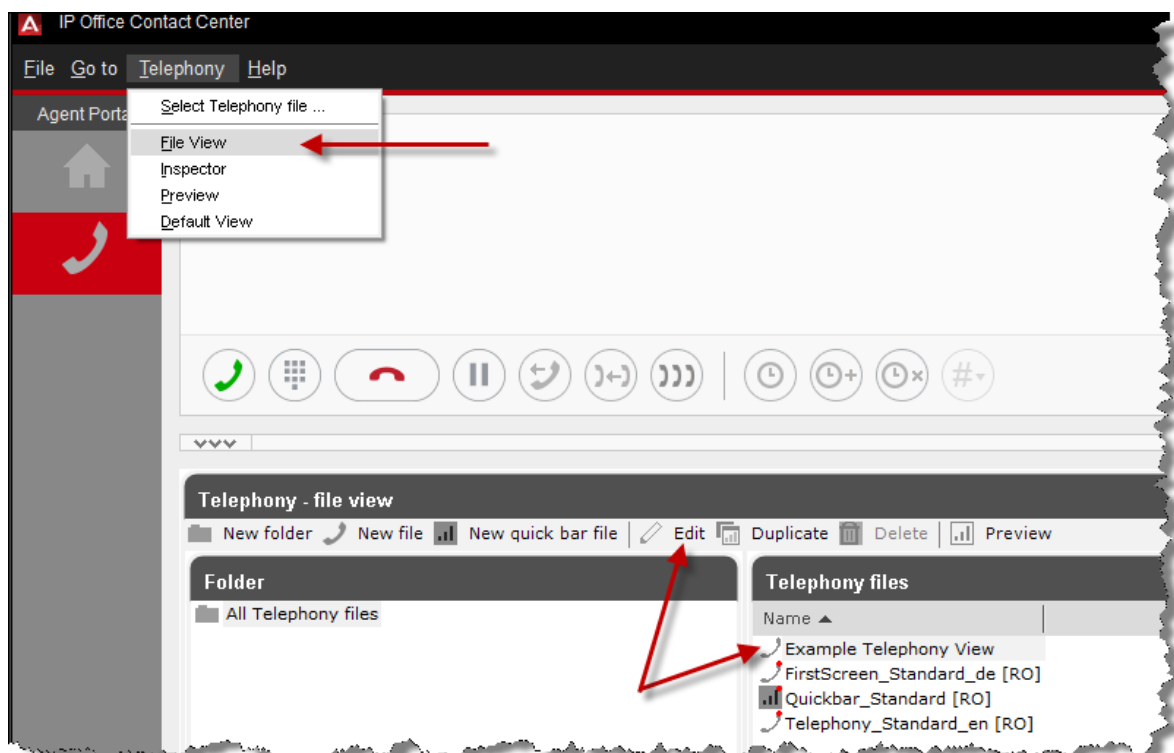
To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Abandoned Call List

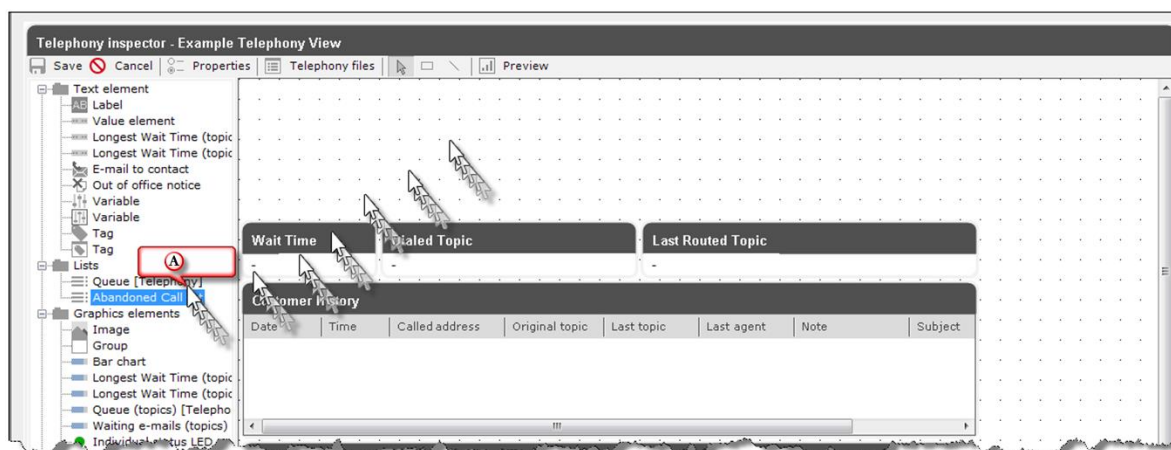
An Abandoned Call list Element can be added to the Telephony View. This list can display a number of parameters for example, the caller's name and number, the time and date of their last call, the number of calls that were disconnected by the system or the caller.

To add an Abandoned Call List Element:

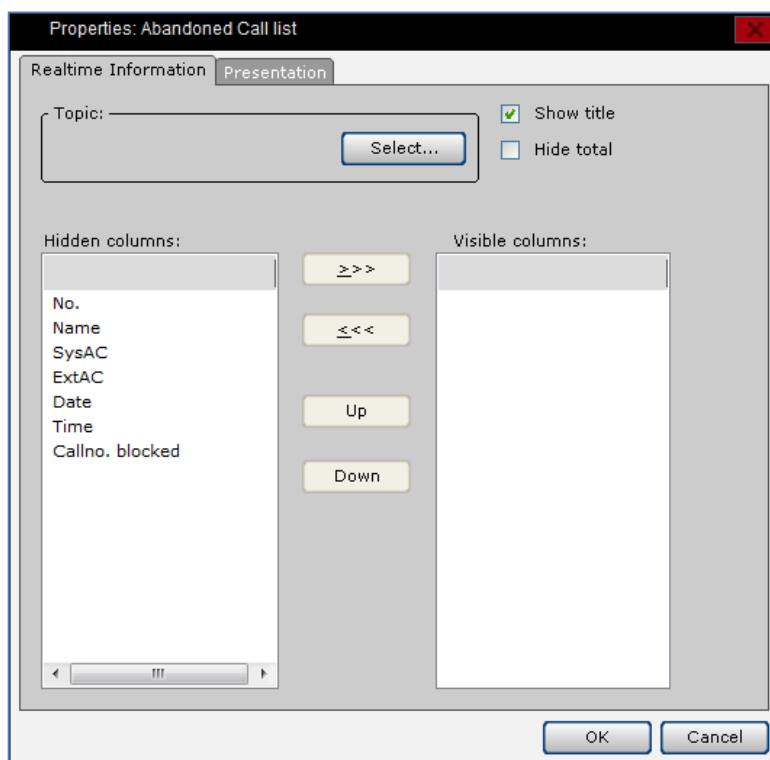
1. Select the duplicated file to be edited, and then click the **Edit** button.



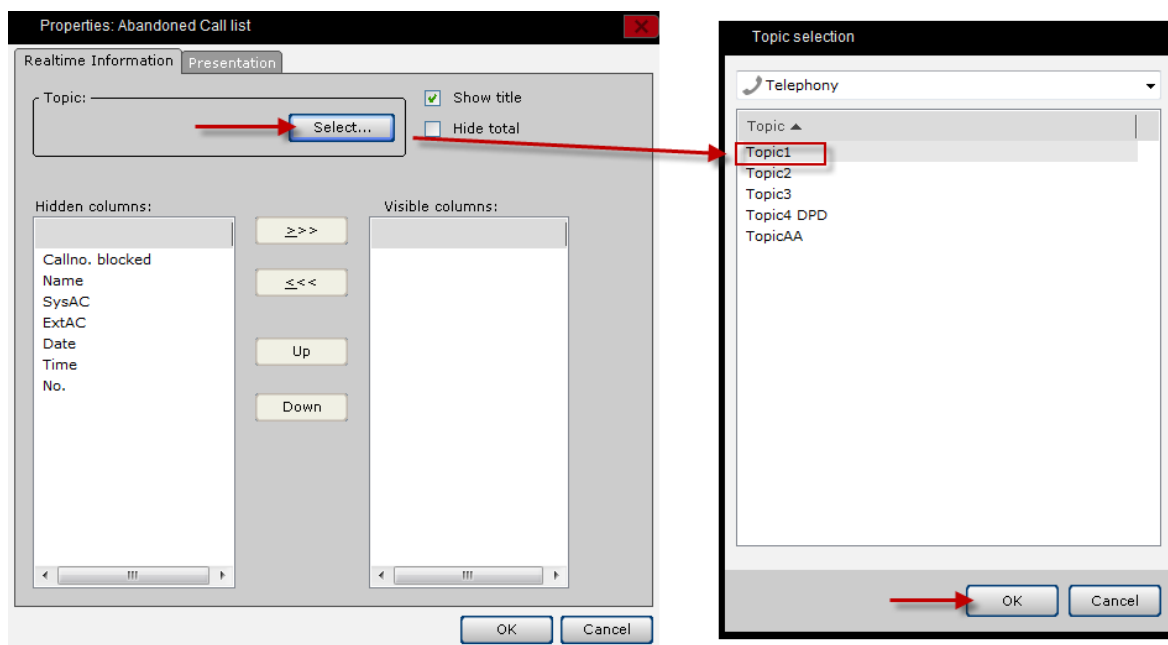
2. Select the **Abandoned Call List Element** and drag it to the Working Area.



- A. Click and drag.
3. The **Properties** screen is displayed.

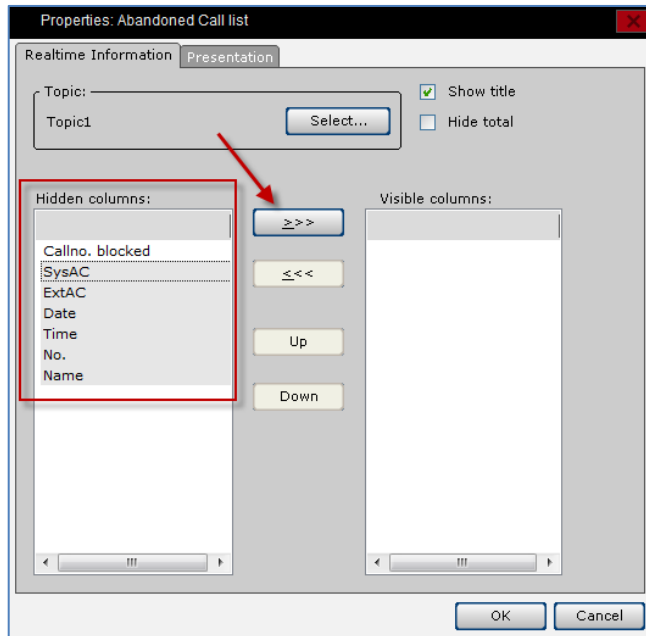


4. Click the **Select** button and select the **Topic** to be referenced in the Abandoned Call List. Click the **OK** button.

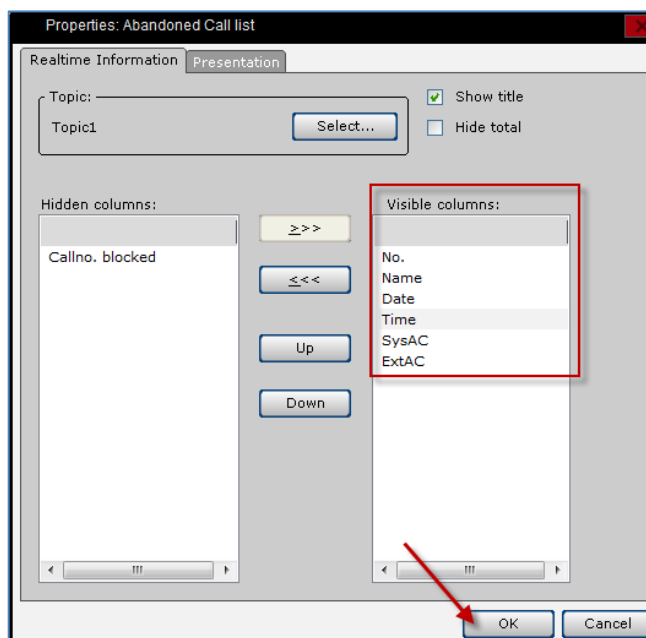




- The column information that is to be displayed in the Abandoned Call List can be selected from the **Hidden Columns** panel and moved to the **Visible Columns** panel. This can be achieved by selecting the required column and clicking the right facing arrow button. (Hold Down the keyboards Ctrl key to select multiple items).

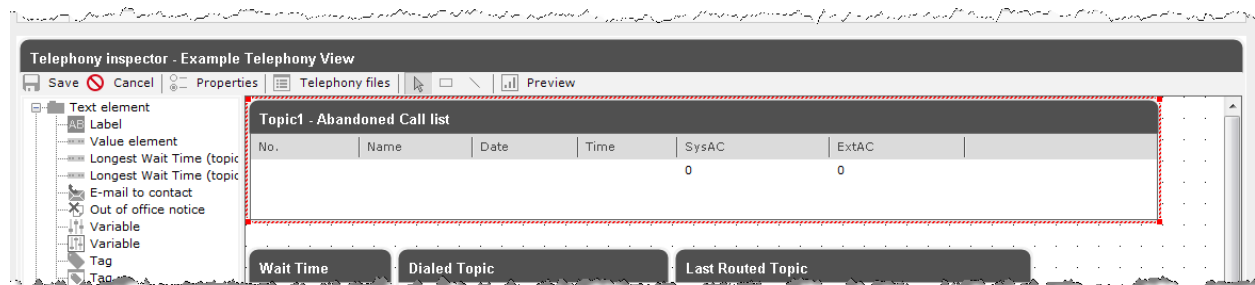
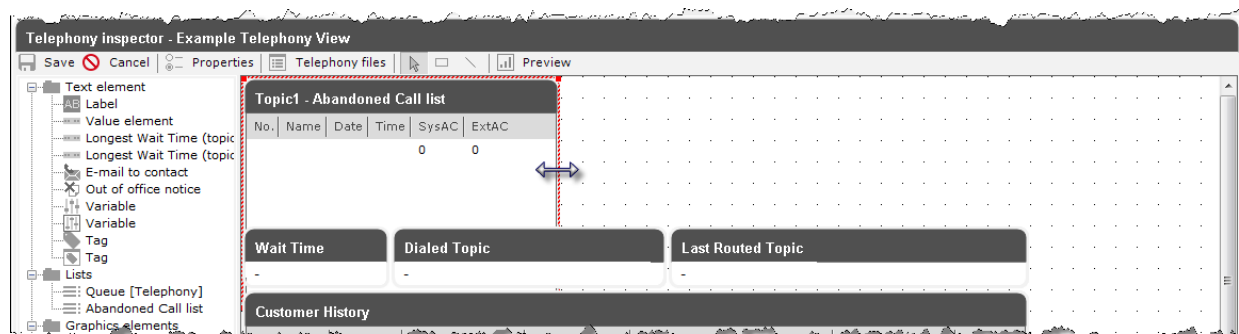


- The selected items are moved to the **Visible Columns** panel. Click the **OK** button.

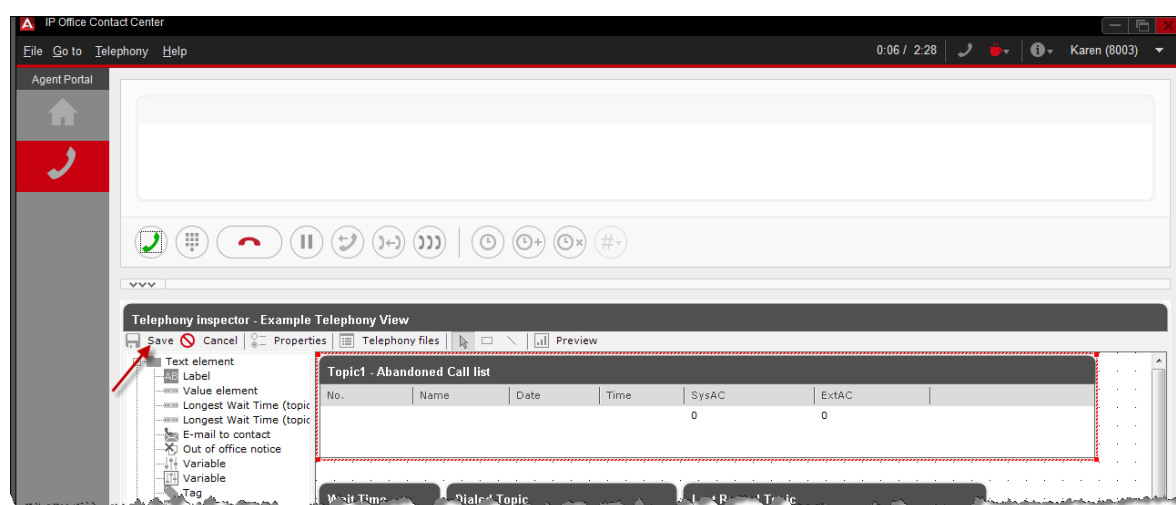


**Note:** The order that the parameters will be displayed can be adjusted by selecting the parameter and clicking the **Up** and **Down** buttons.

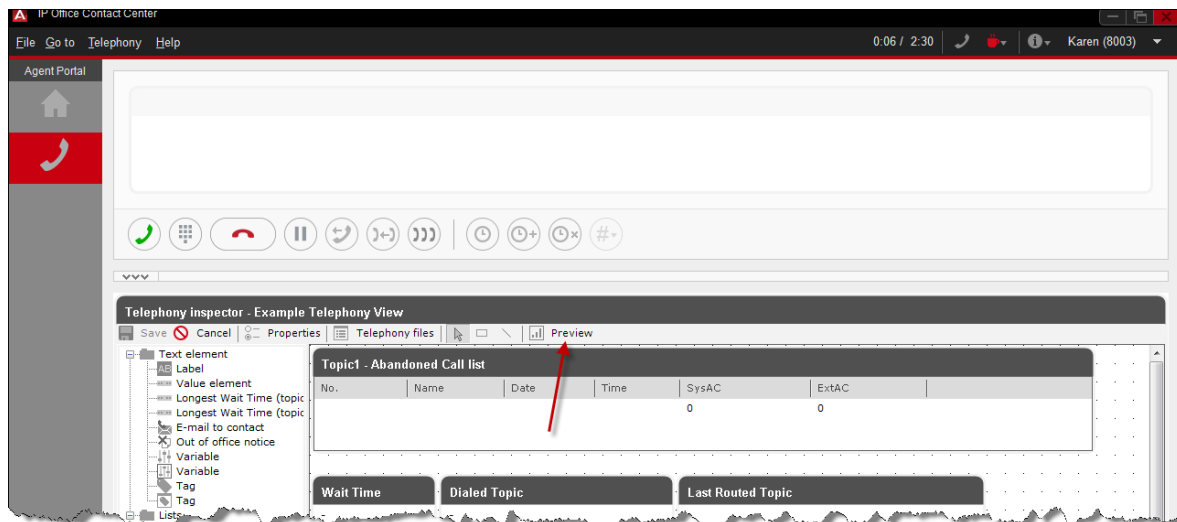
- The configured element is displayed in the Working Area. To adjust the size of the element, click the element so that its red border is displayed. Then click on the red border and expand it to the required size.



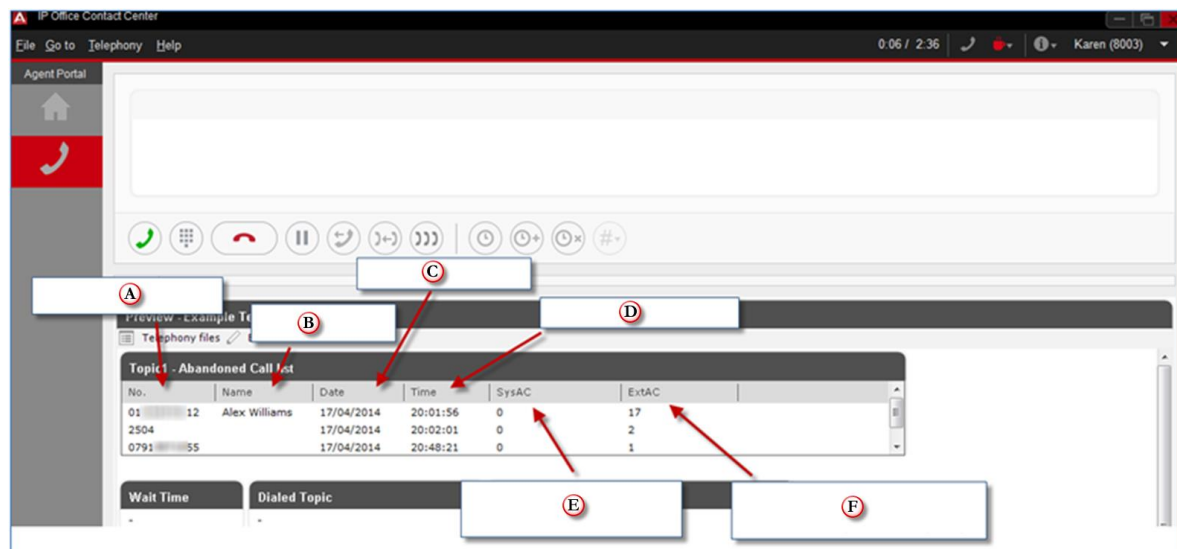
- Click the **Save** button.



- To preview the configured changes, click the **Preview** button.

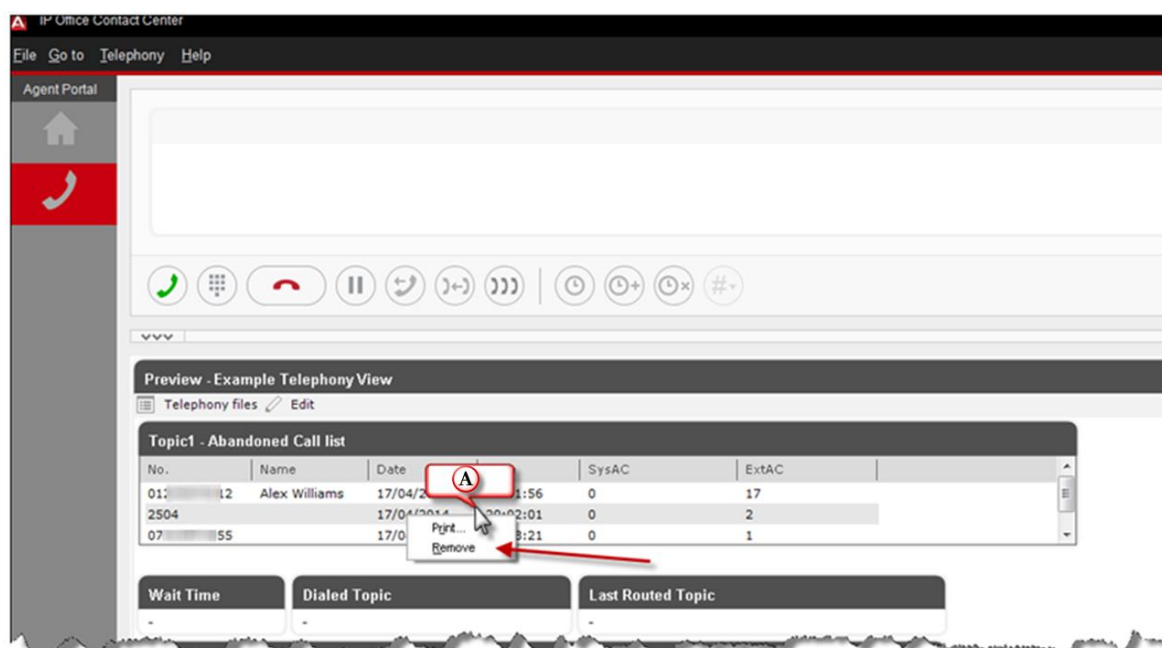


10. The preview page is displayed. Any abandoned calls are listed against the parameters that were previously defined.



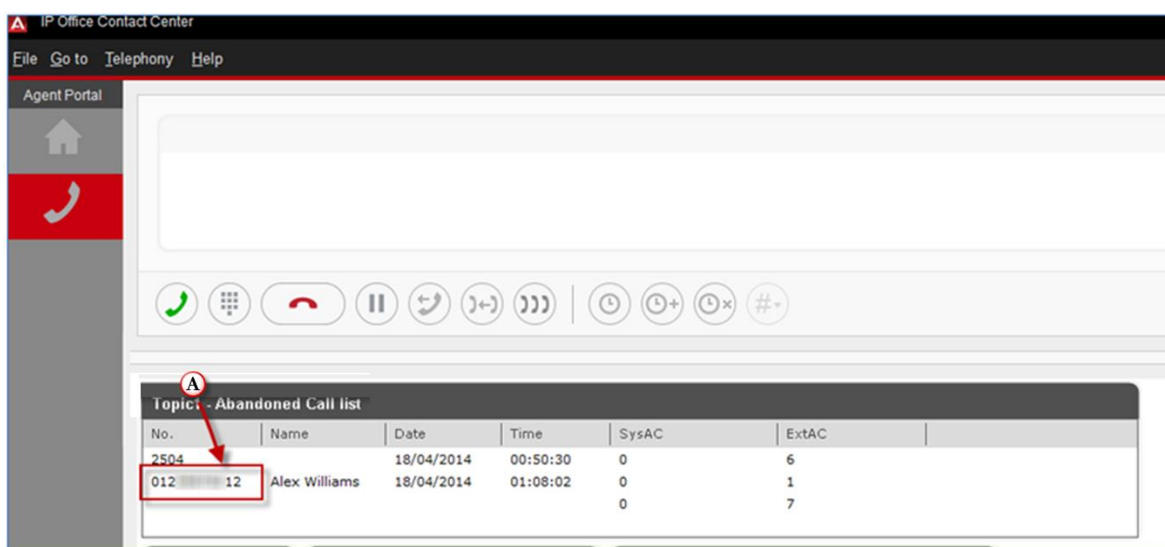
- A. Caller's Number
- B. Caller's Name
- C. Date of Last Call
- D. Time of Last Call
- E. Number of calls cancelled by the system
- F. Number of unanswered calls cancelled by external party

11. The agent can view the list, to obtain the numbers of abandoned callers and therefore potentially call those customers back. The call can then be removed from the list by right clicking on the call record and selecting **Remove**.



A. Right click.

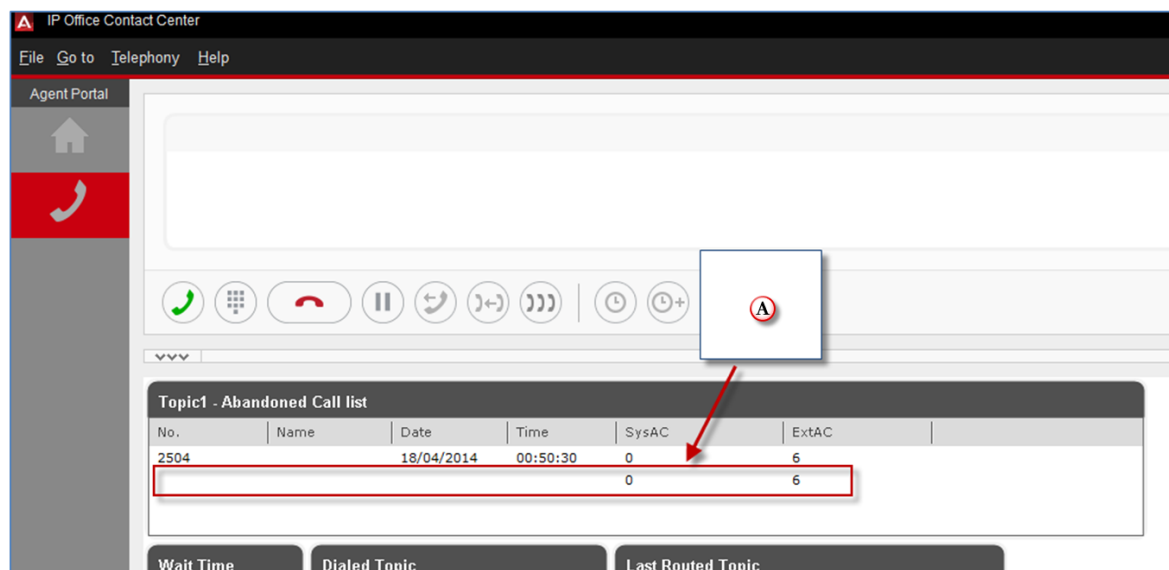
12. If an agent double clicks on a customer's number in the Abandoned Call List, the customer will be called.



A. Double click to call the customer from the abandoned call list.

**Note:** A column field named **Callno. blocked** can be added to signal to other agents, that this number is already in use for 'calling back' purposes.

13. Once called, the customer's number will then be removed from the Abandoned Call List.



A. The customer's number is removed from the list once they have been called back.

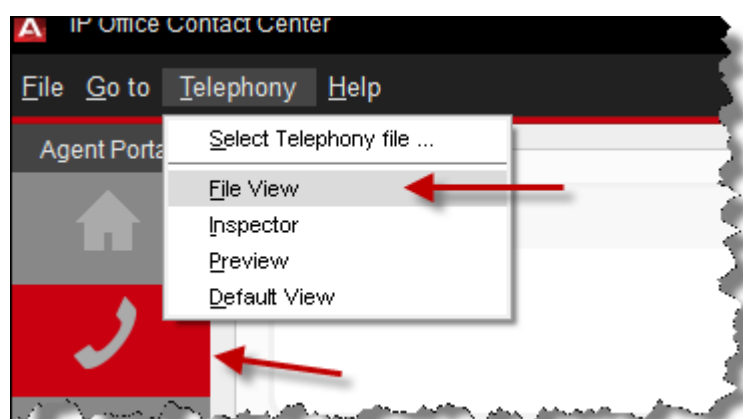
14. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

### Adding an Image Element to the Working Area

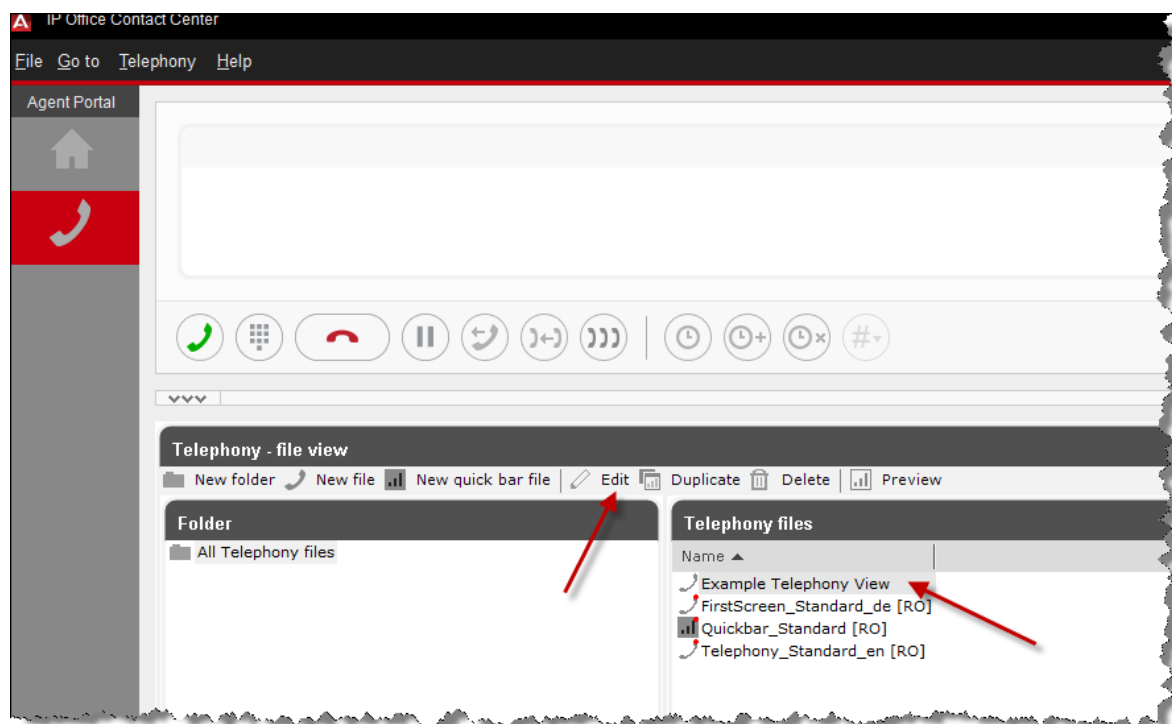
A graphical image, for example a company logo can be added to the Working Area. The title can be added to the image and its size adjusted.

To add an image:

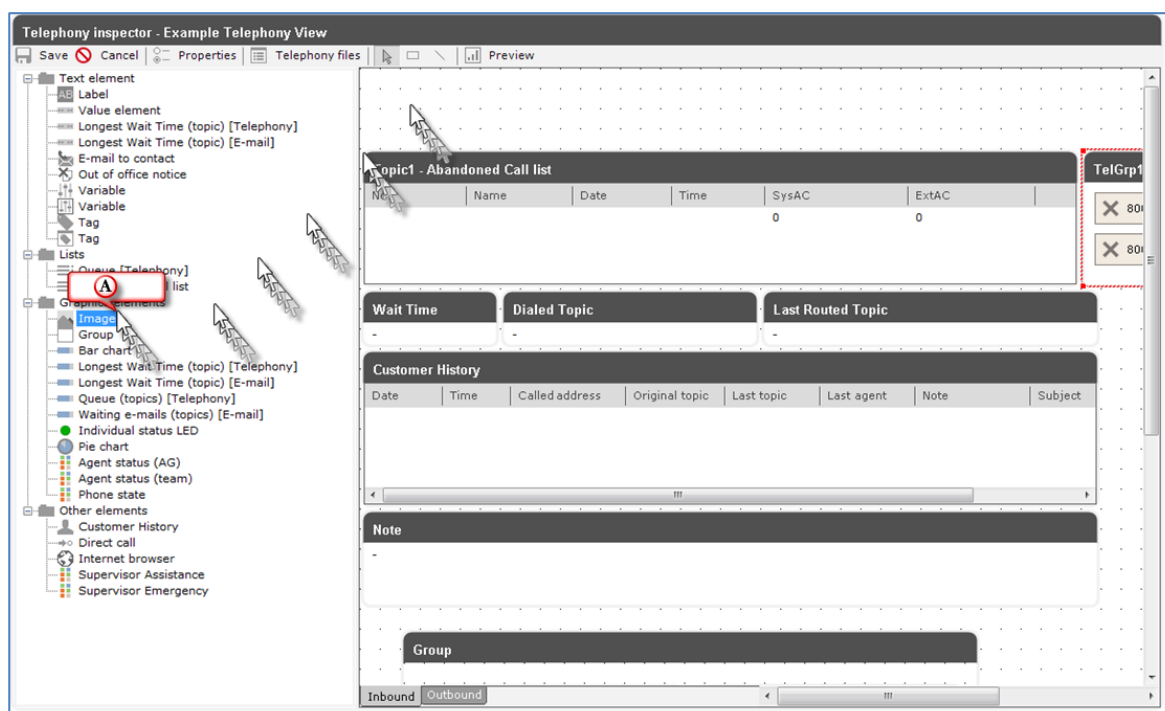
1. From the menu bar select **Telephony** followed by **File View**.



2. Select the duplicated file to be edited, and then click the **Edit** button.

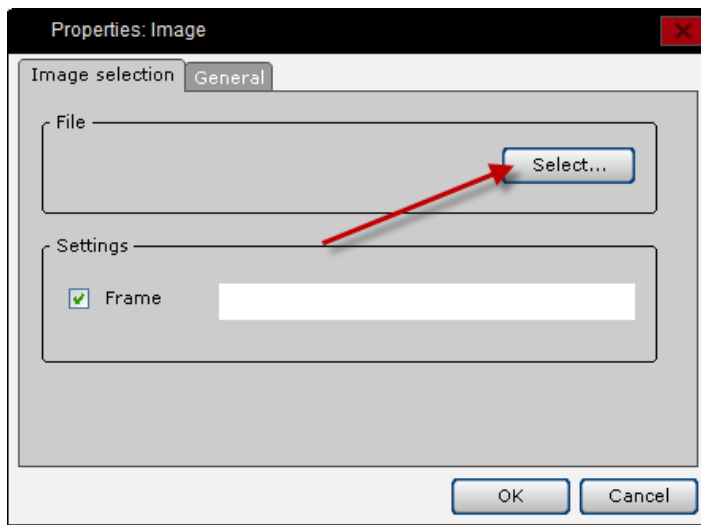


3. Select the Image element, and drag it onto the Working Area.

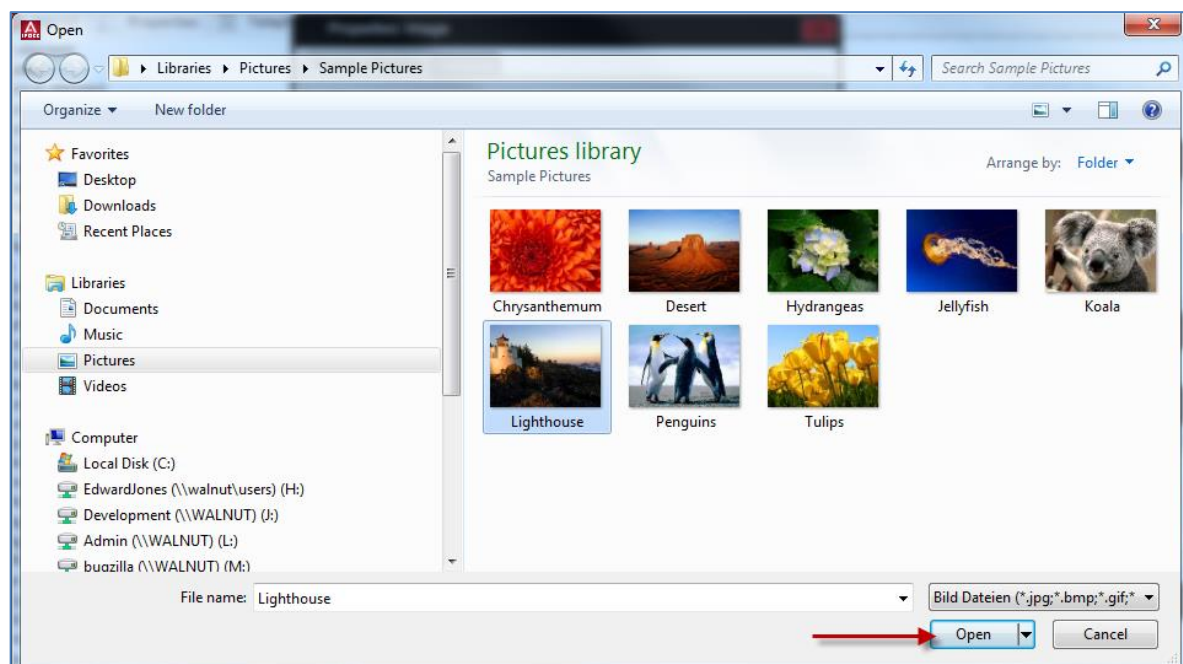


A. Click and drag.

4. The **Properties** page is displayed. Click the **Select** button.

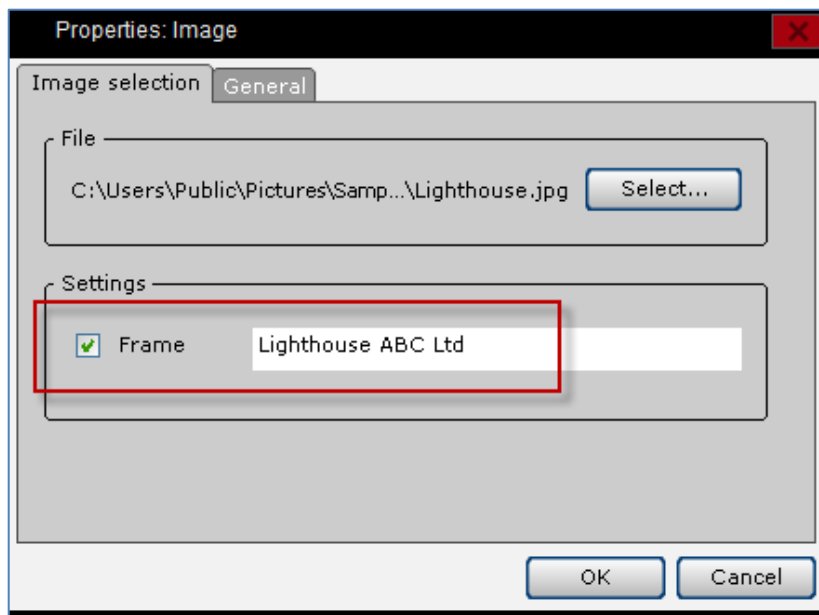


5. Navigate to the image to be utilized. Select the image and click the **OK** button.



**Note:** The following file formats are supported, .bmp, .jpg, .gif, .png

6. A **Frame** and **Title** for the image can also be added.

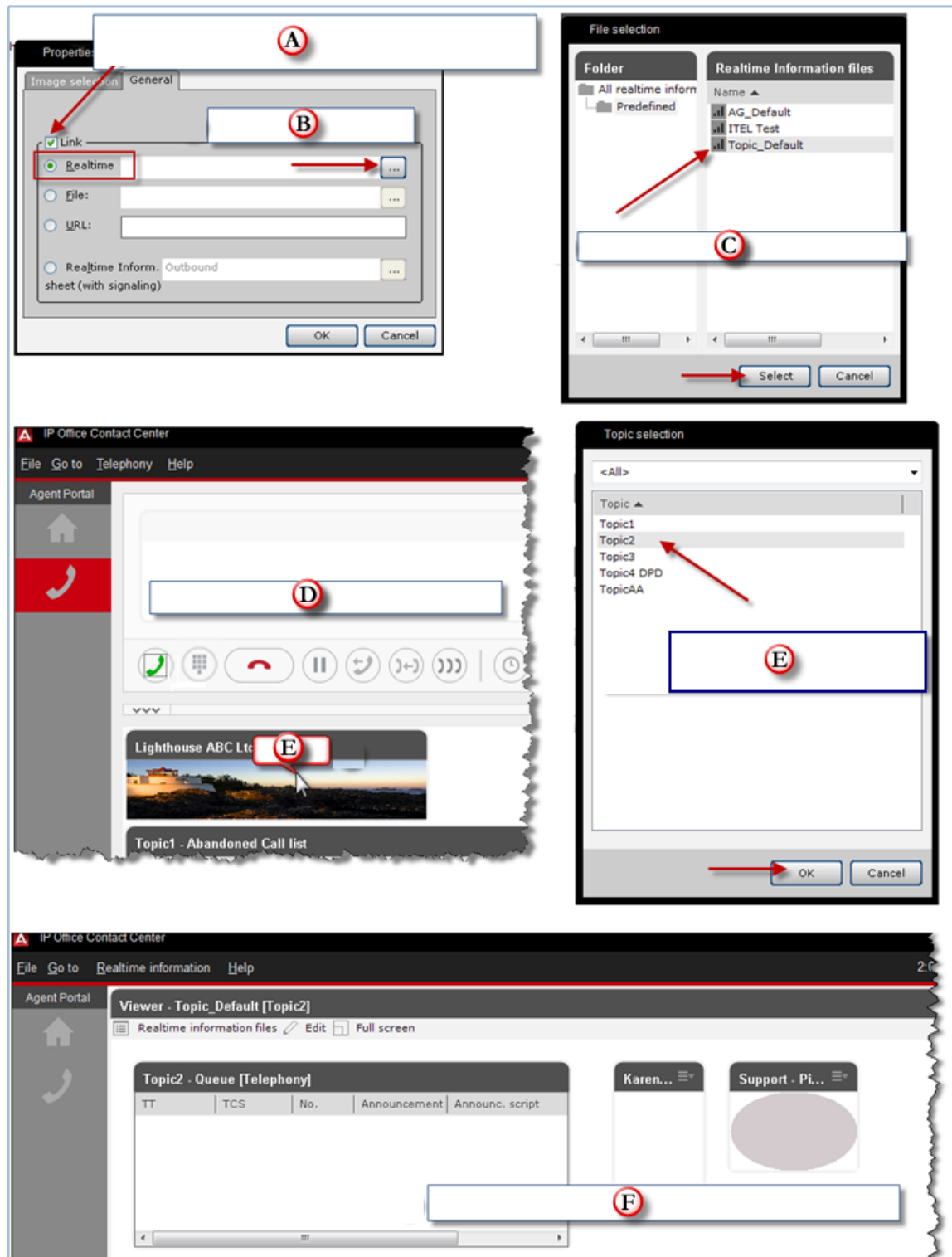


7. Click on the **General** tab. From this screen links can be created to:
- a. display real time information
  - b. display or open a file. For example, a document containing common support issues or sales product offers can be launched and viewed by the agent
  - c. or display a web page.



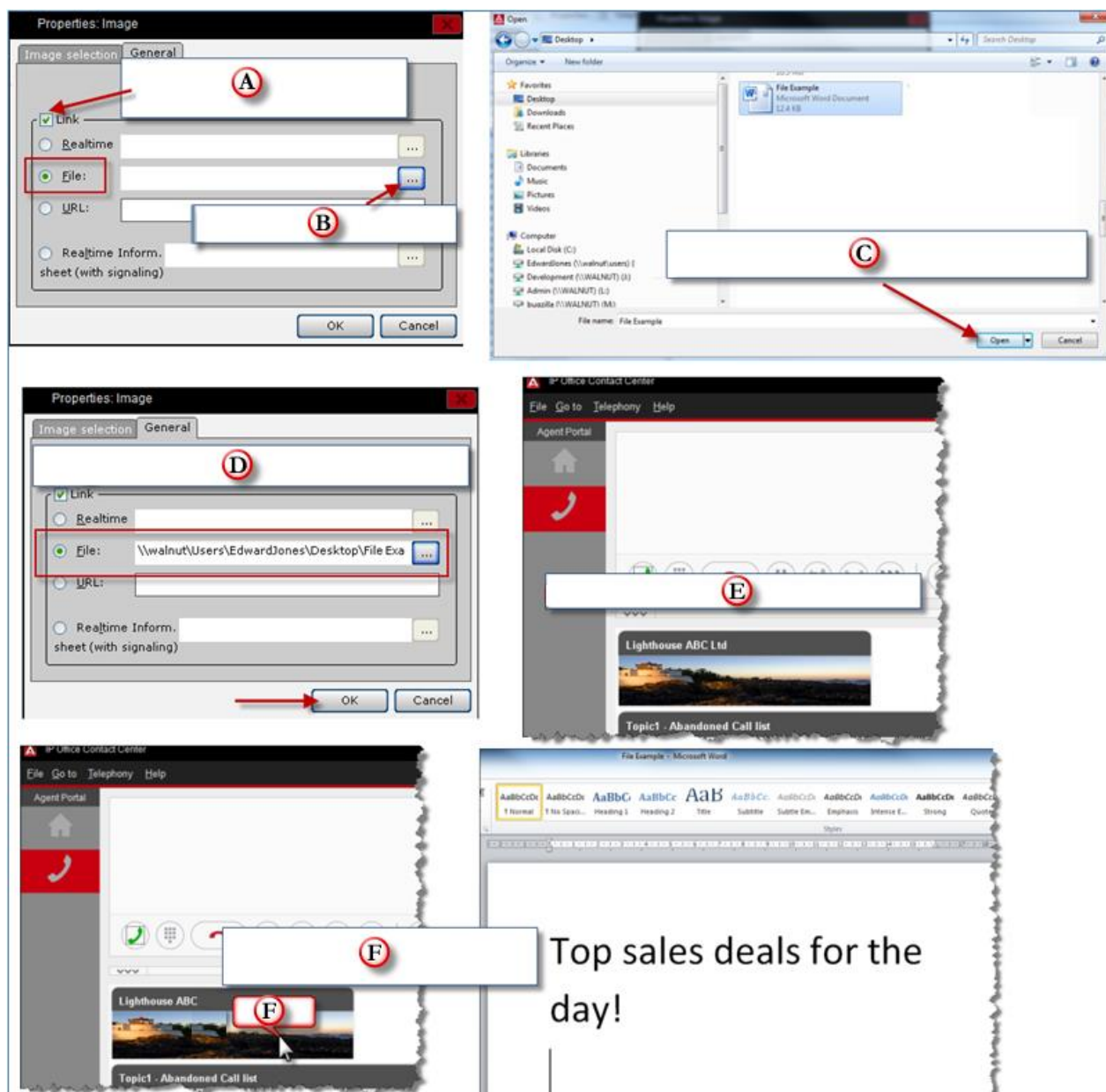
## Realtime example

- A. Click the **Link** check box and select the Realtime radio button.
- B. Click the builder button
- C. Select the Realtime file to be viewed
- D. Once saved, a link is added to the image
- E. When the image is clicked, a Topic can be selected
- F. The related Realtime information is displayed.



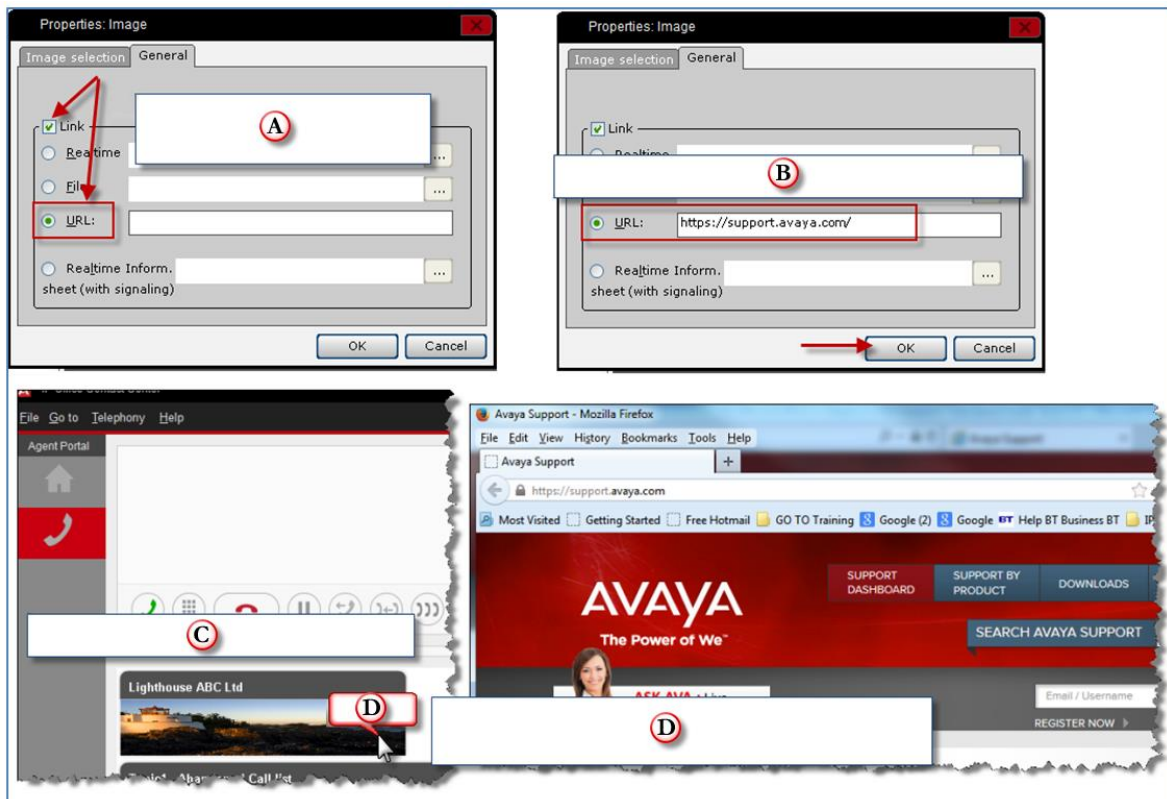
## File Example

- A. Click the Link check box, then select the file radio button.
- B. Click the Builder button.
- C. Navigate to the file to be opened and click **OK**.
- D. The path to the file is displayed.
- E. Once saved, a link is added to the image.
- F. When the image is clicked, the associated file is opened.



## URL Example

- A. Click the **Link** check box then the **URL** radio button.
- B. Enter the URL of the website to be displayed.
- C. Once saved, a link is added to the image.
- D. When the image is clicked, the URL will be opened and the web page launched.



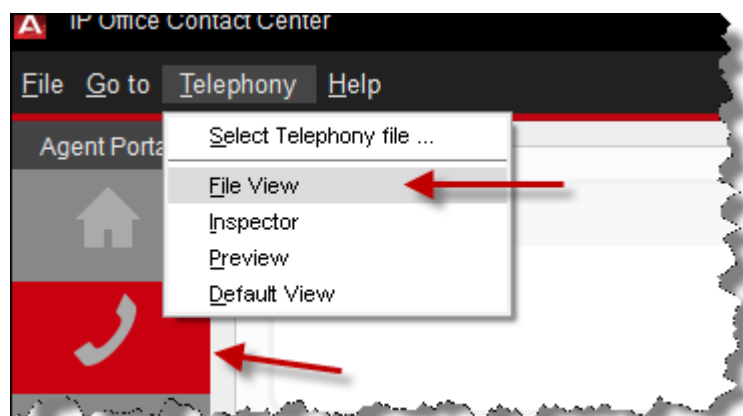
8. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Adding a Group Element to the Telephony View

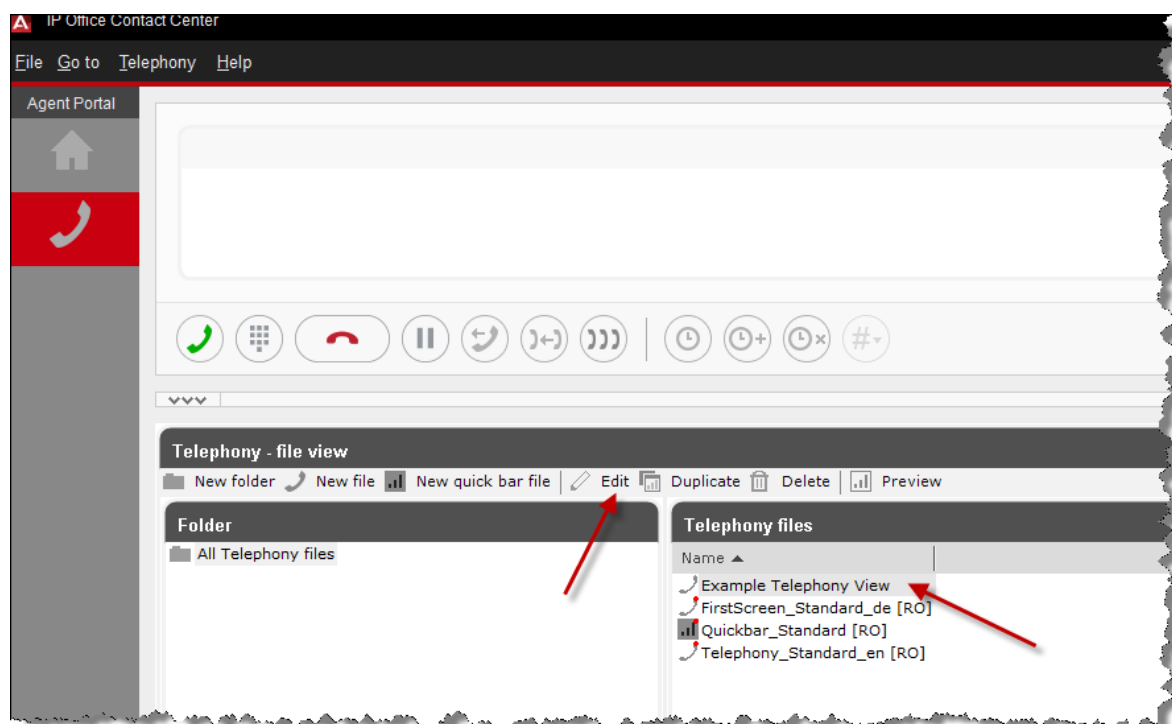
A group element can be used to collate a collection of configured elements together. The group element can be given a name and its background color changed.

To add a group element:

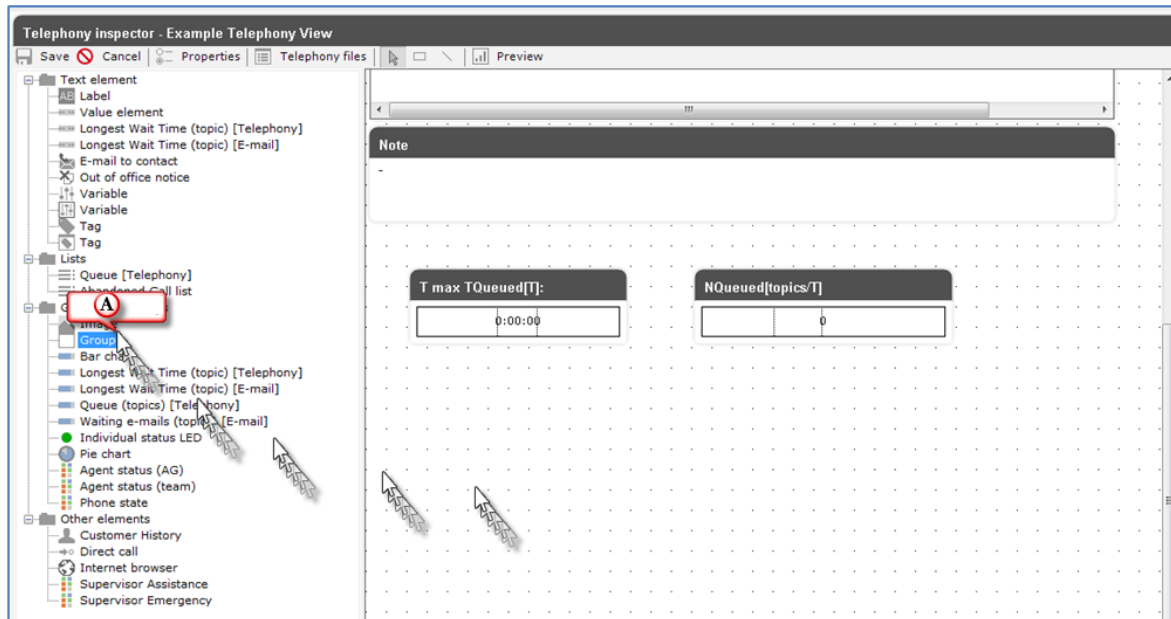
1. From the menu bar select **Telephony** followed by **File View**.



2. Select the duplicated file to be edited, and then click the **Edit** button.

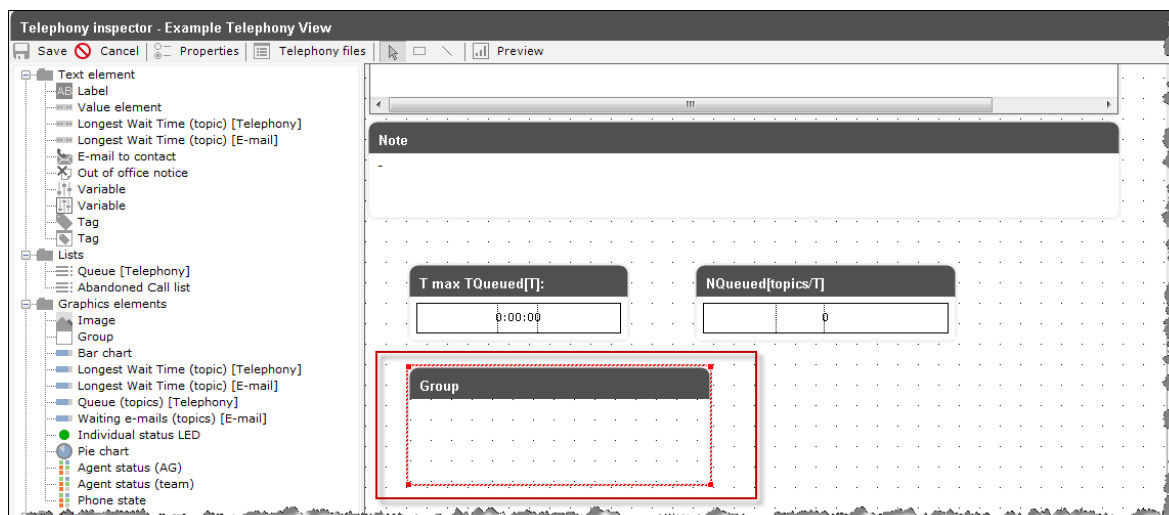


3. Select the **Group** element, and drag it onto the Working Area.

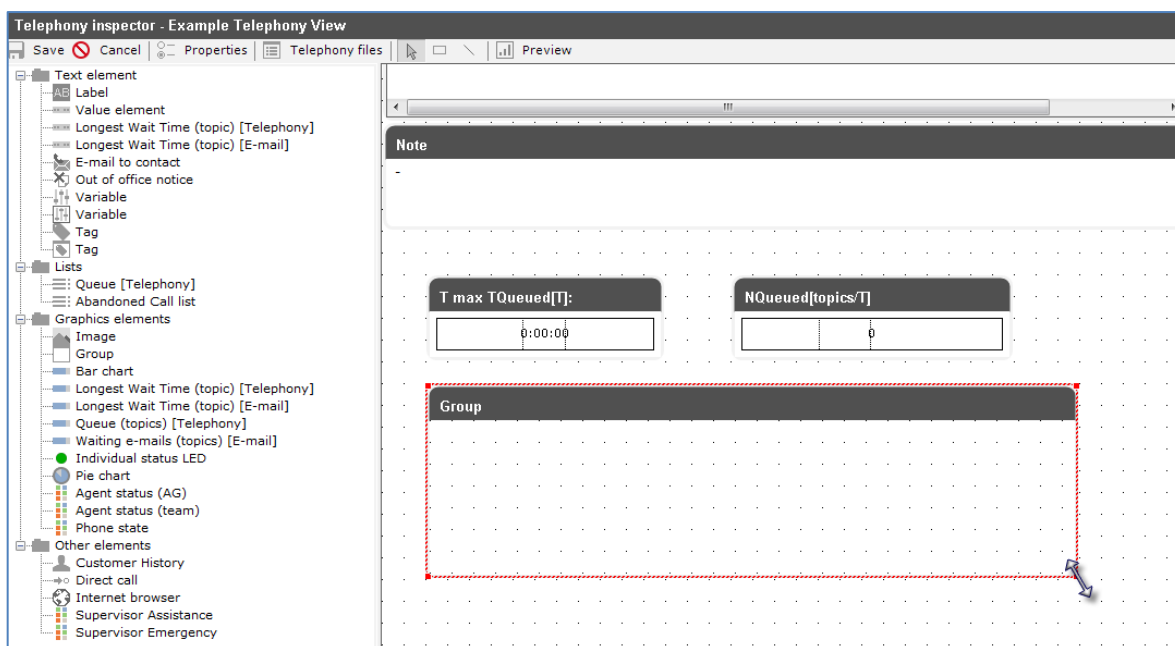


A. Click and drag

4. The Group element is displayed.



5. Expand the element to the required size.

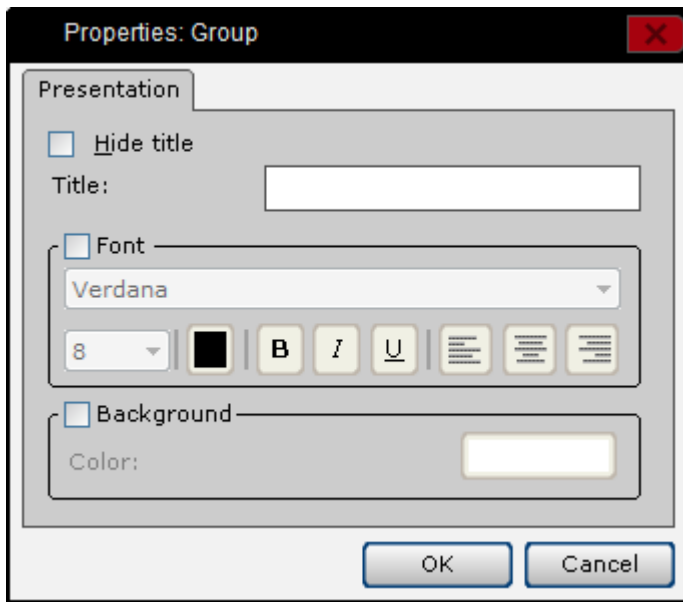


6. Right click on the element and select **Properties**.

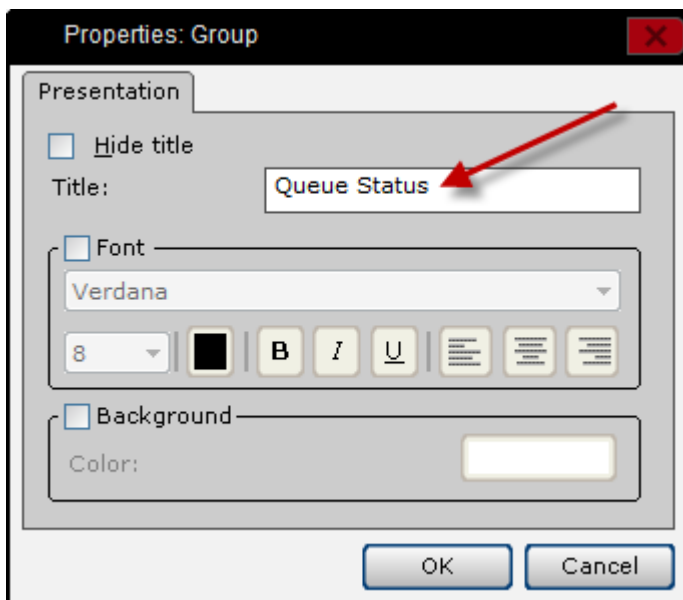


A. Right click.

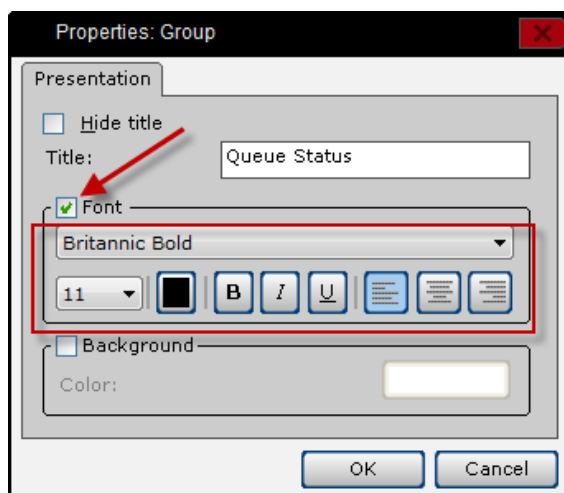
7. The **Properties** dialogue box is displayed.



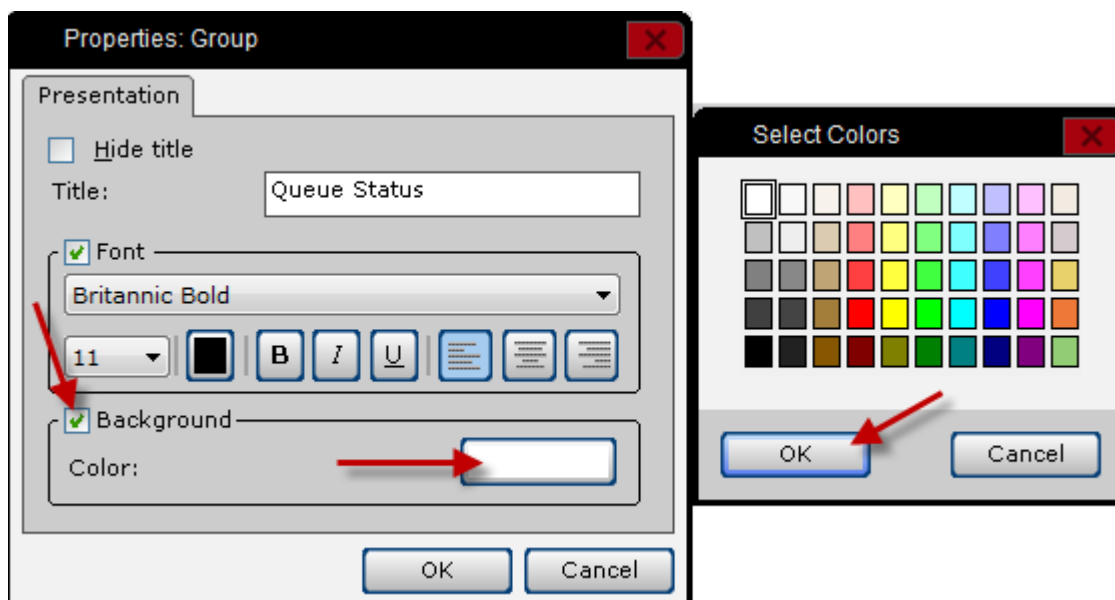
8. A title can be added to the Group element.



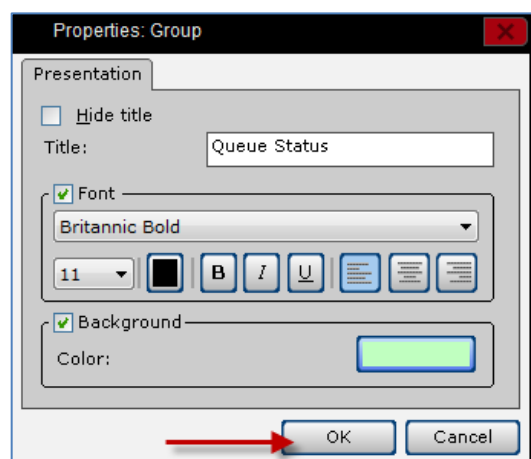
9. If required, the font can be changed. Select the Font check box and select the font type, color and size as required.



10. A background color can also be added to the element. Select the **Color** check box and then click the color button. Select the required color from the palette and click **OK**.

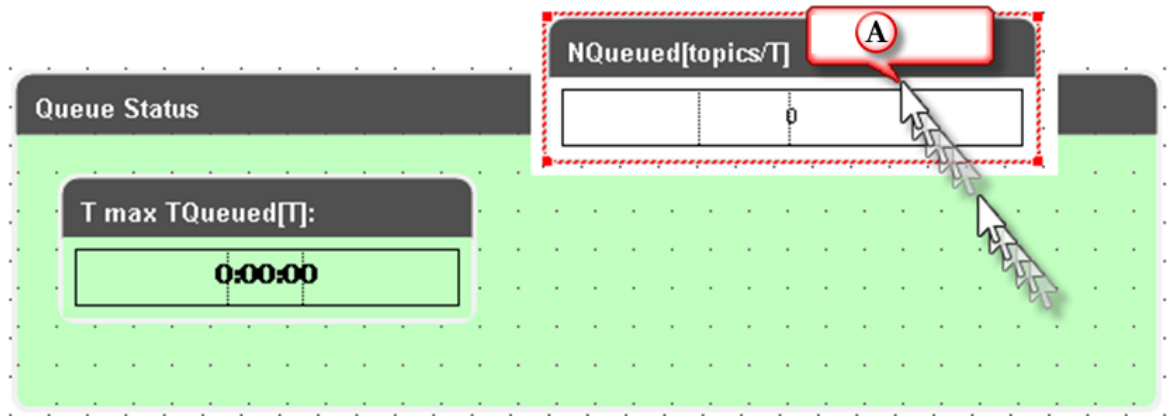


11. Click the **OK** button.



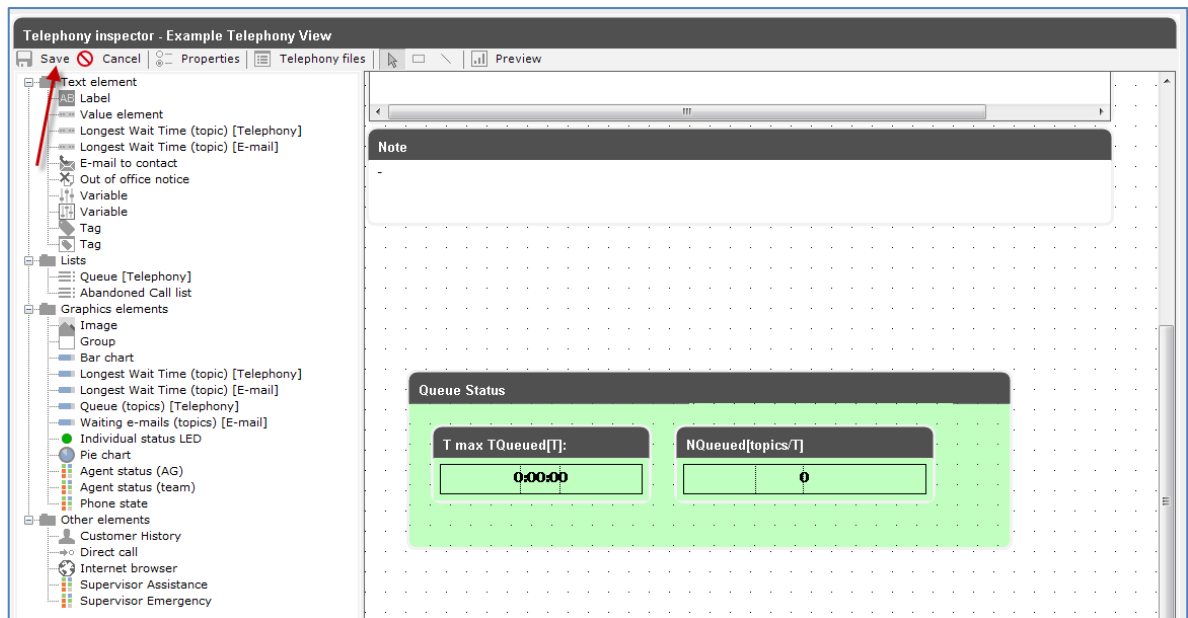


12. Drag the required configured element into the Group element box.

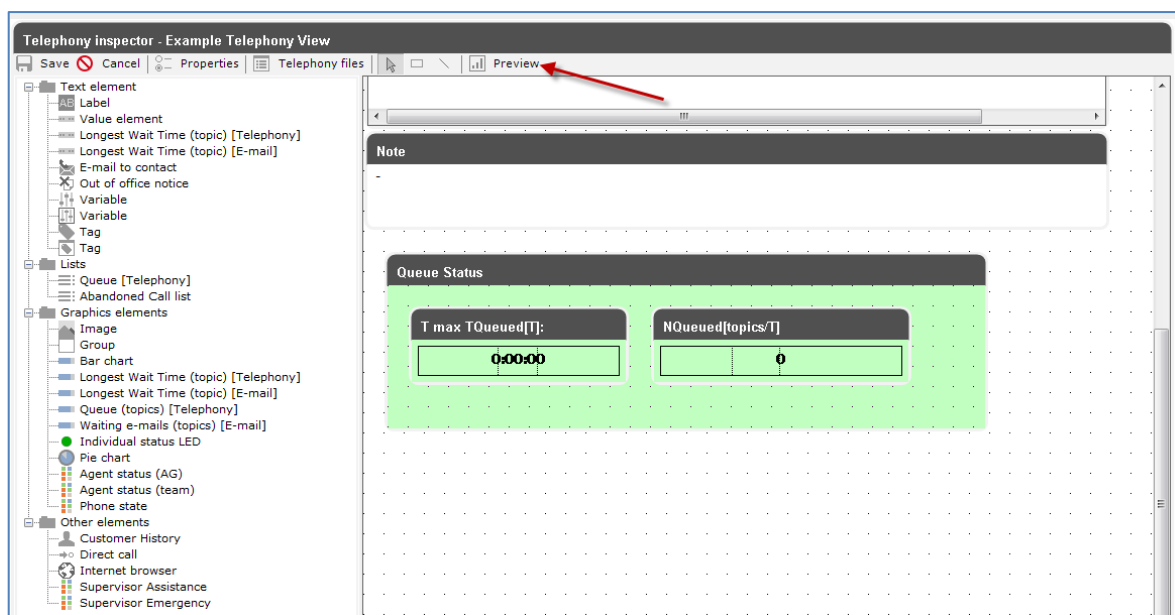


A. Click and drag.

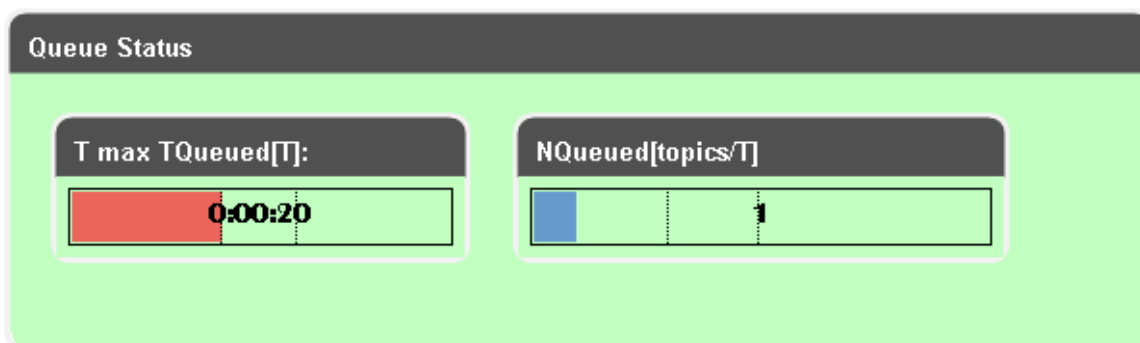
13. Click the **Save** button.



14. Click the **Preview** button.



15. The configured Group element is displayed.



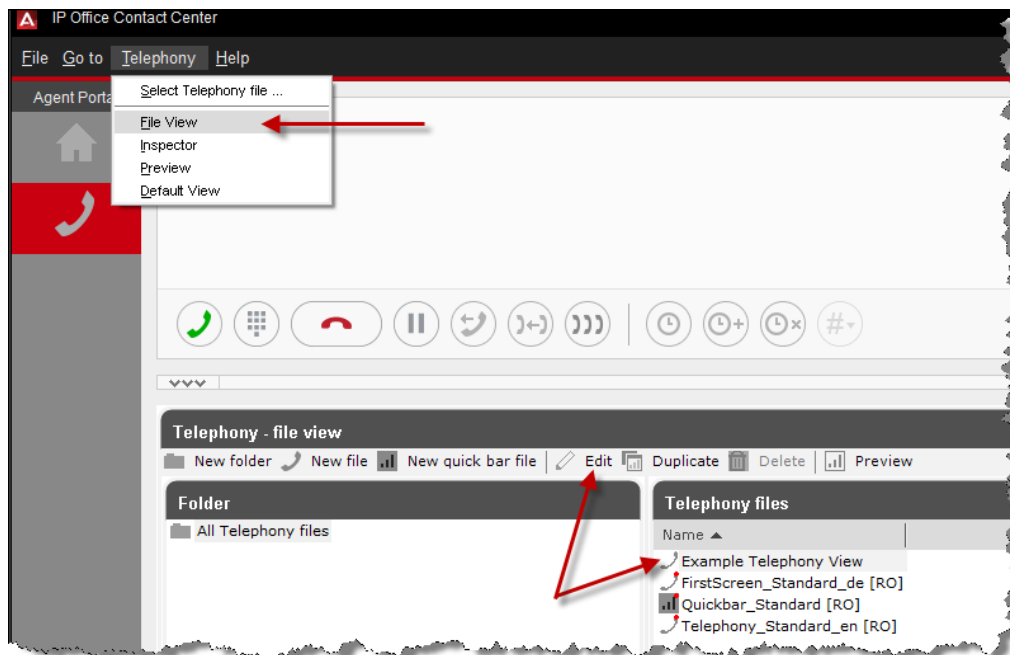
16. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Graphics Elements

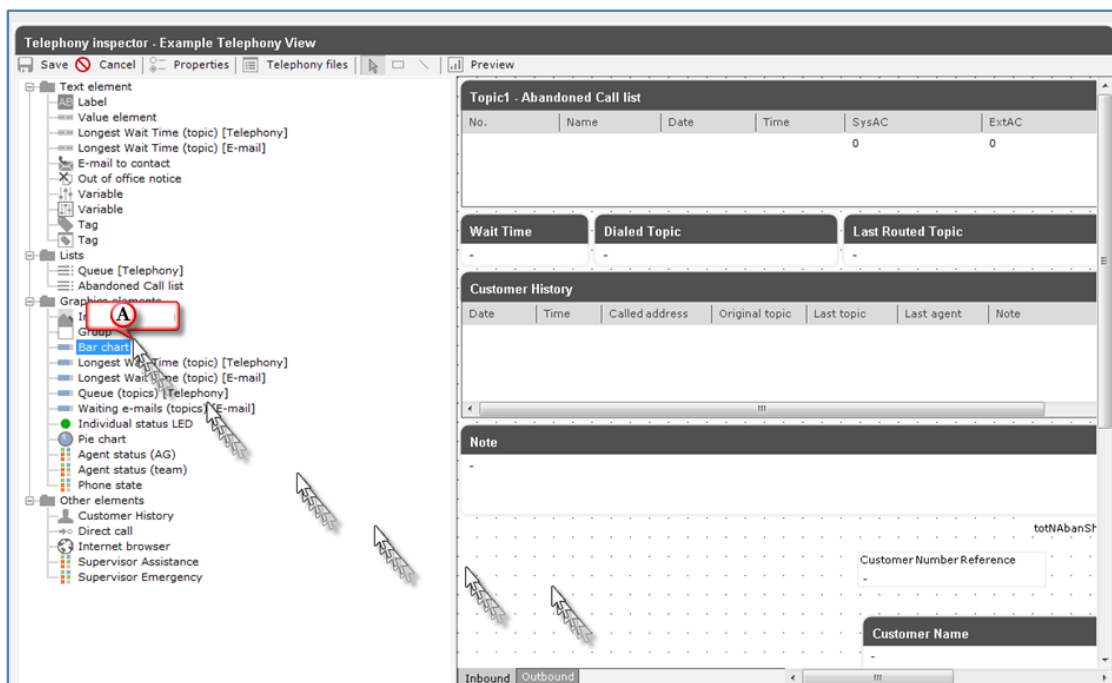
**Graphics Elements** including Bar Charts, Queue Topics and Longest Wait Time elements can be added to the Telephony View.

### Adding a Bar Chart Element to the Working Area

1. Select the duplicated file to be edited, and then click the **Edit** button.

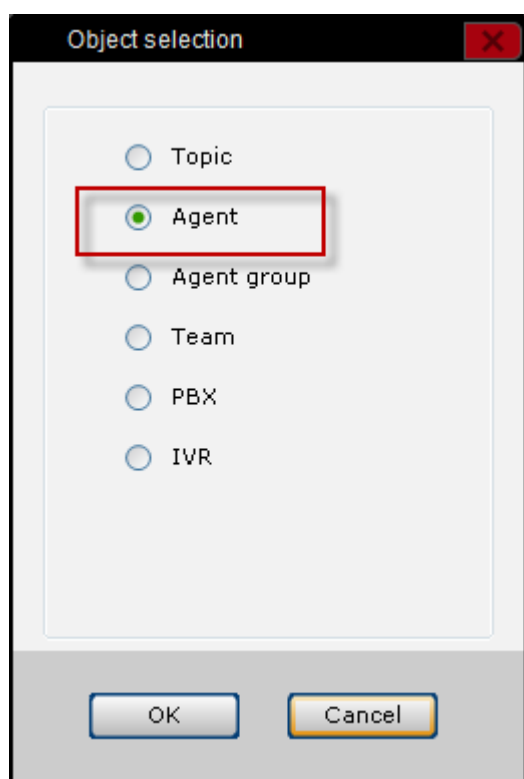


2. Click on the **Bar Chart** element and drag it to the Working Area.

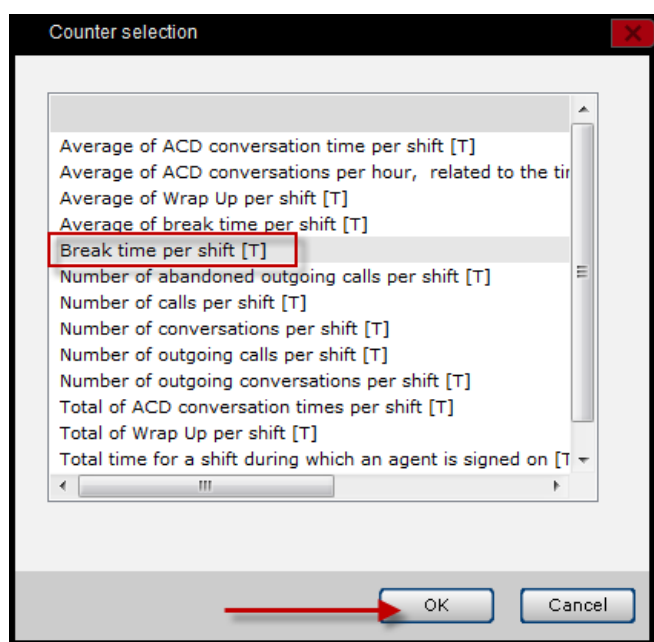


A. Click and drag.

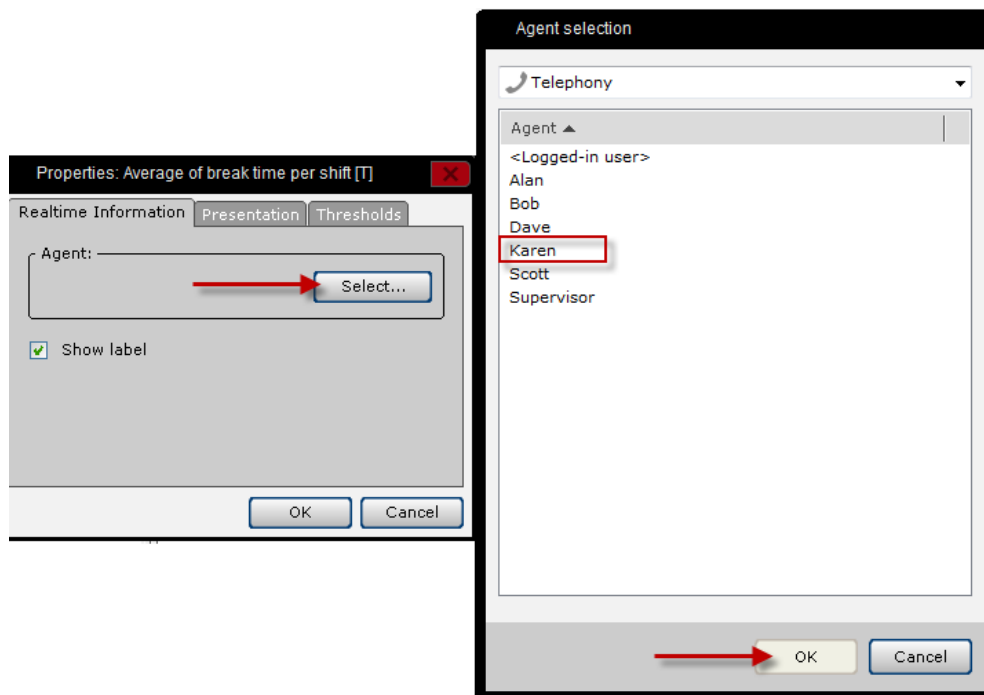
3. The **Object Selection** dialogue box is displayed. In this example, the Agent radio button has been selected. Click the **OK** button.



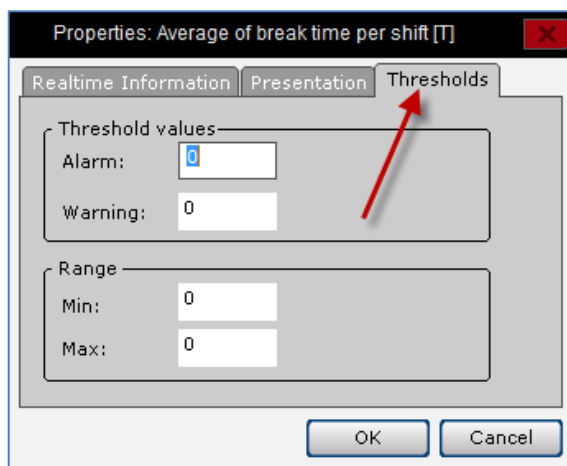
4. The **Counter selection** screen is displayed. Select the Counter to be utilized and then click the **OK** button. In this example, a counter called **Break time per shift** has been selected. This counter will determine the amount of time the agent has been on break time.



5. The **Properties** dialogue box is displayed. Click the **Select** button and select the agent to which the Bar chart will be applicable. Click the **OK** button.



6. Click on the **Thresholds** tab.



7. Enter the required thresholds (in seconds) for when a **Warning** and **Alarm** status will be displayed.

Properties: Average of break time per shift [T]

Realtime Information Presentation Thresholds

Threshold values

Alarm: 100

Warning: 80

Range

Min: 0

Max: 0

OK Cancel

8. From the **Range** section of the screen, enter **Min** and **Max** values to determine the range to be monitored for this alarm. Click the **OK** button.

Properties: Average of break time per shift [T]

Realtime Information Presentation Thresholds

Threshold values

Alarm: 100

Warning: 80

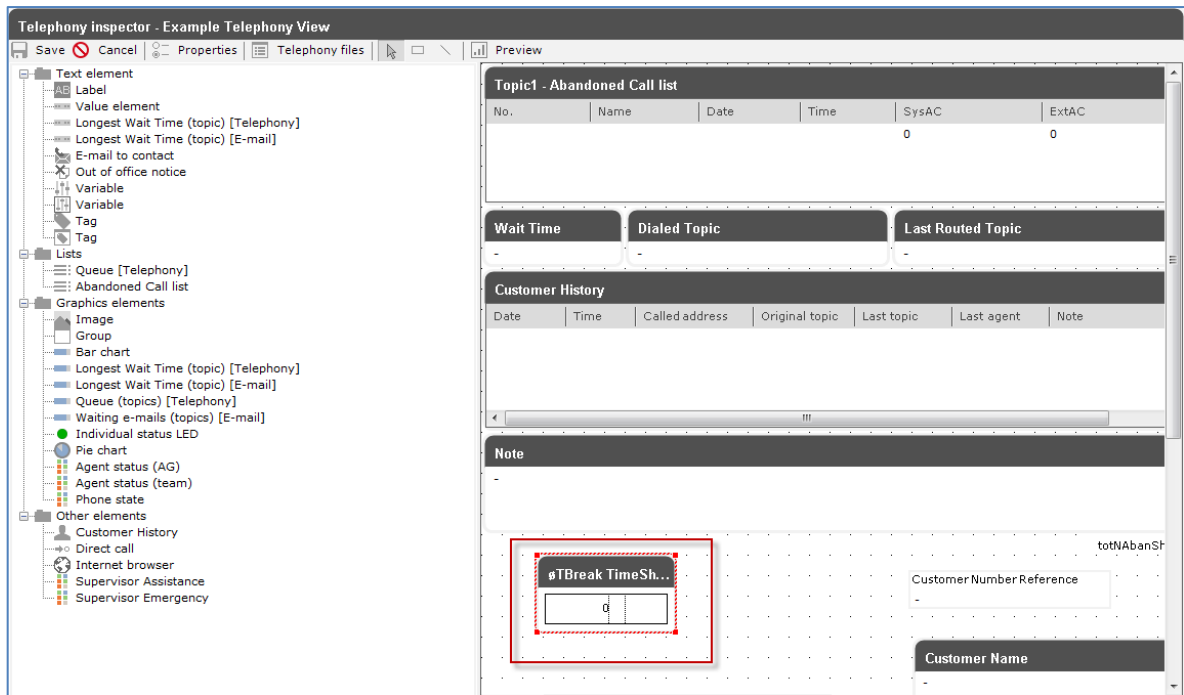
Range

Min: 0

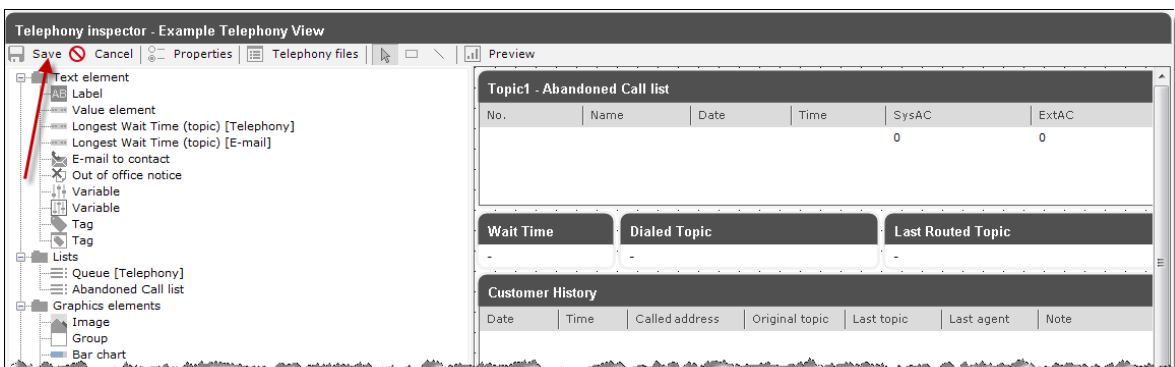
Max: 150

OK Cancel

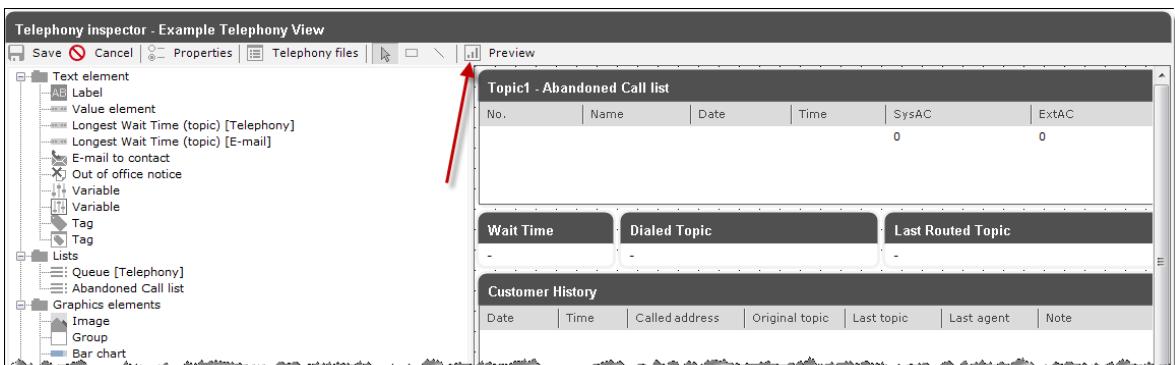
9. The configured element is displayed.



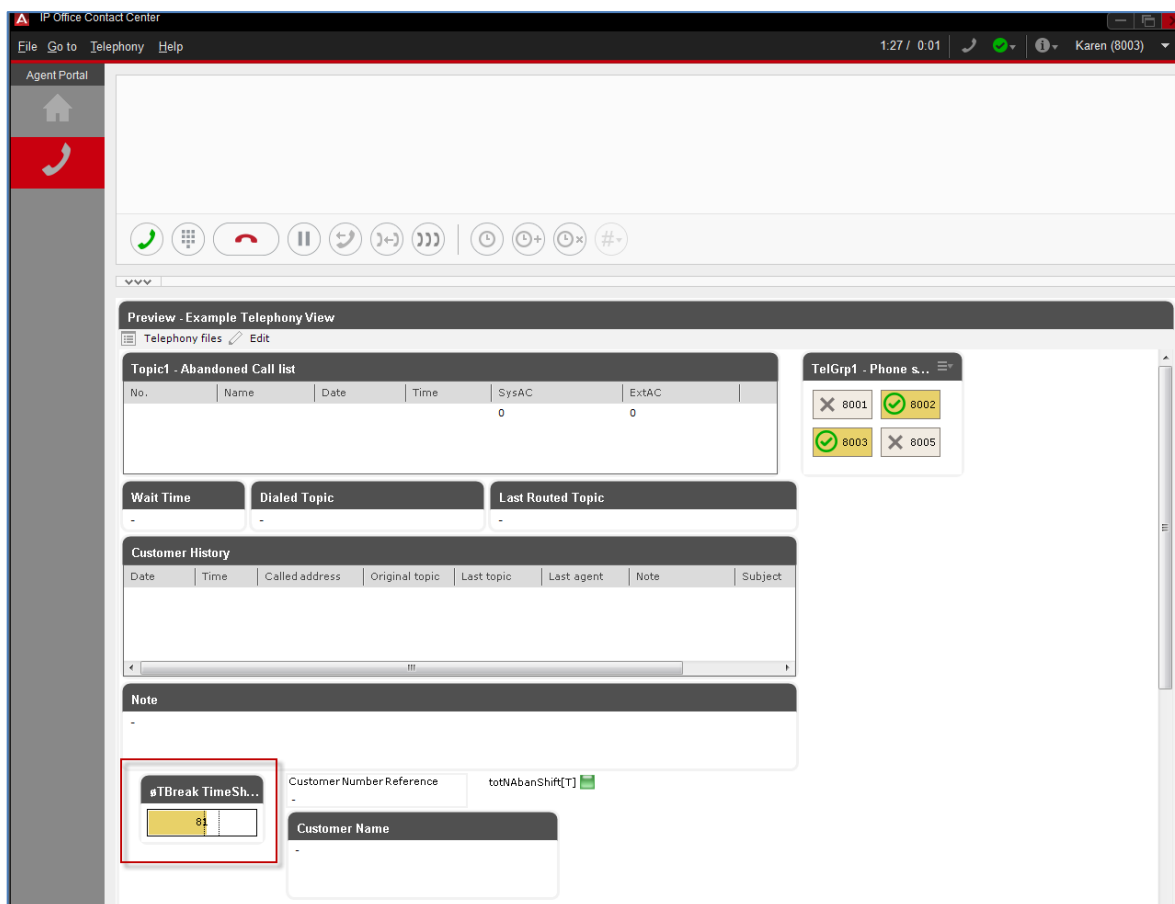
10. Click the **Save** button.



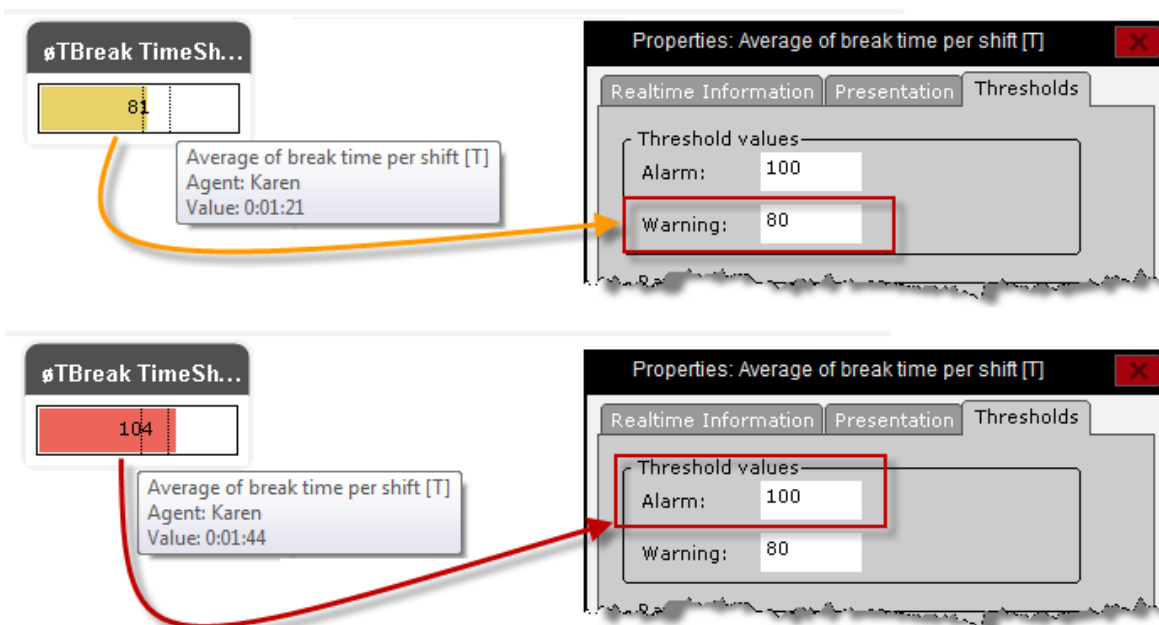
11. Click the **Preview** button.



12. The configured element is displayed.



13. The Warning and Alarm status of the agents break time will be displayed in real time.

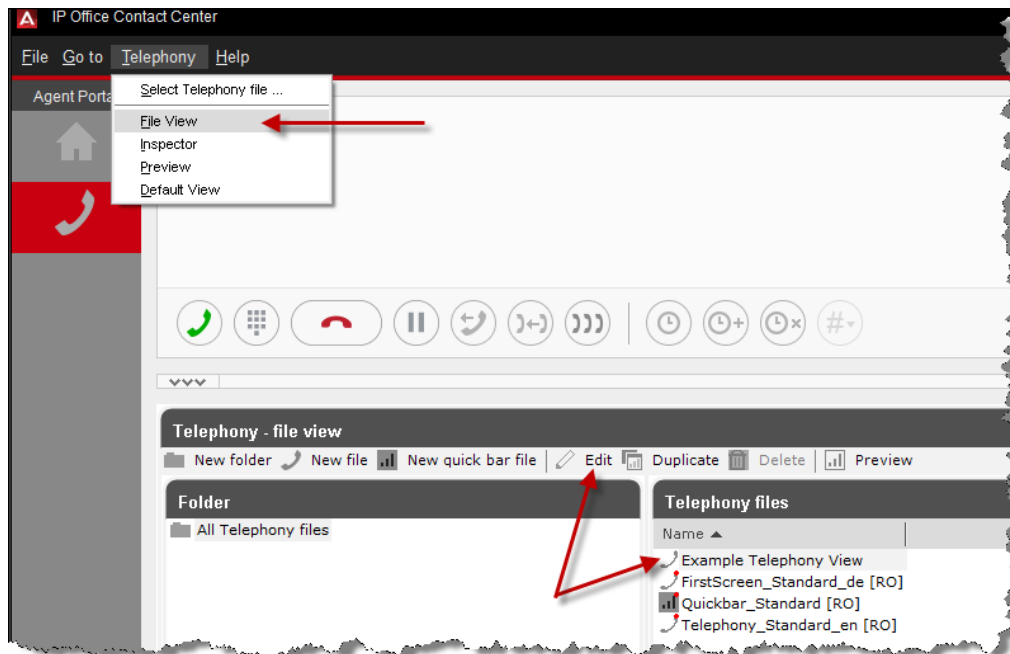




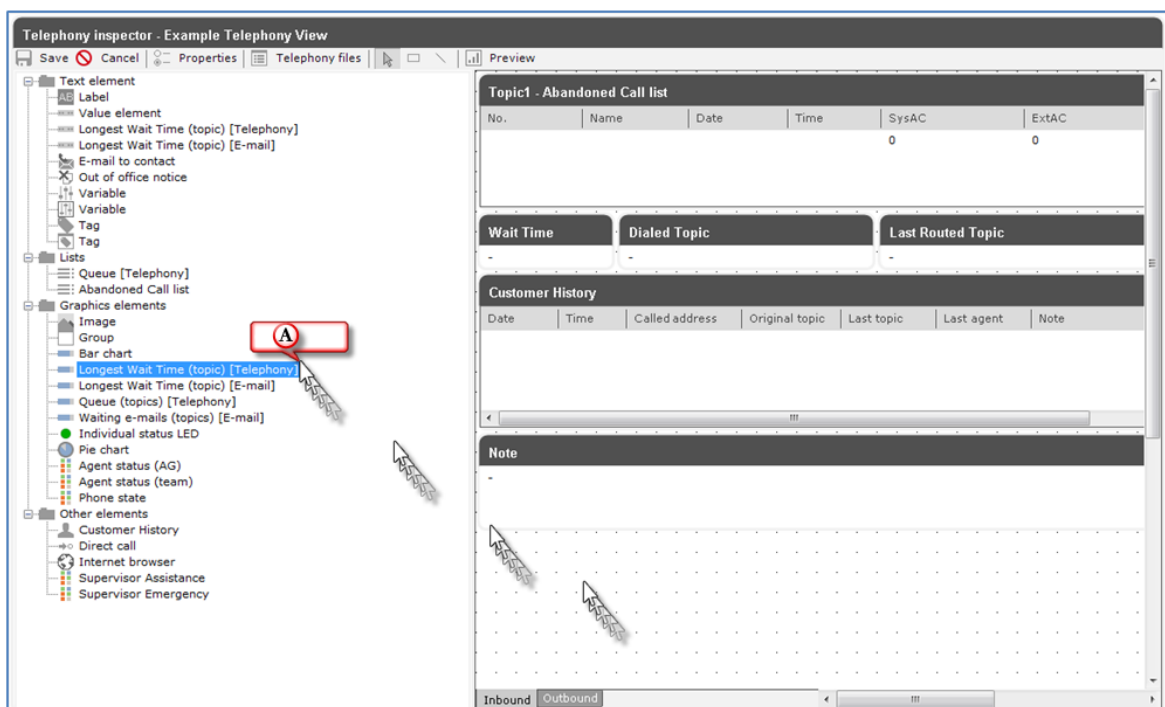
14. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.  
**Longest Wait Time (topic) [Telephony] Element**

The Longest Wait Time (topic) [Telephony] element can be utilized to generate alarms against calls that are presented to the Topic and are queuing for defined periods of time beyond configured warning and alarm thresholds.

15. Select the duplicated file to be edited, and then click the **Edit** button.

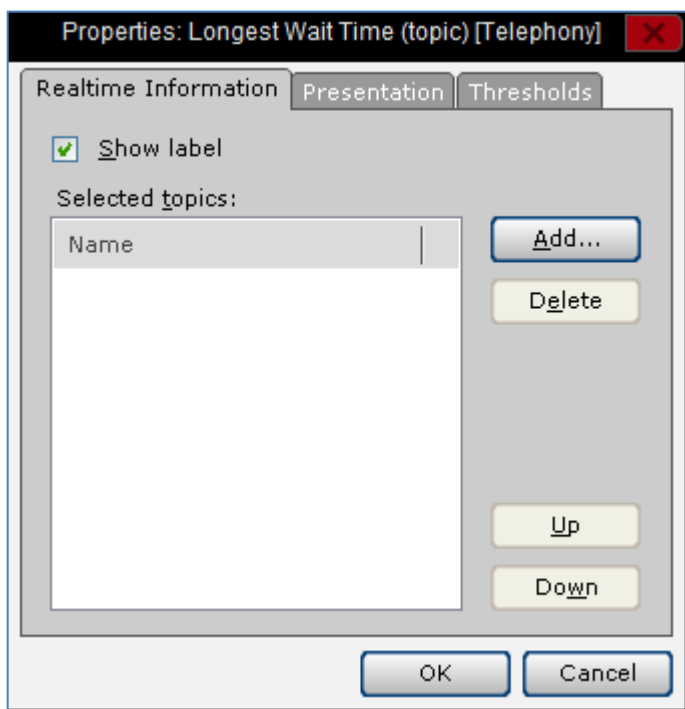


16. Click on the **Longest Wait Time (topic) [Telephony]** element and drag it to the Working Area.

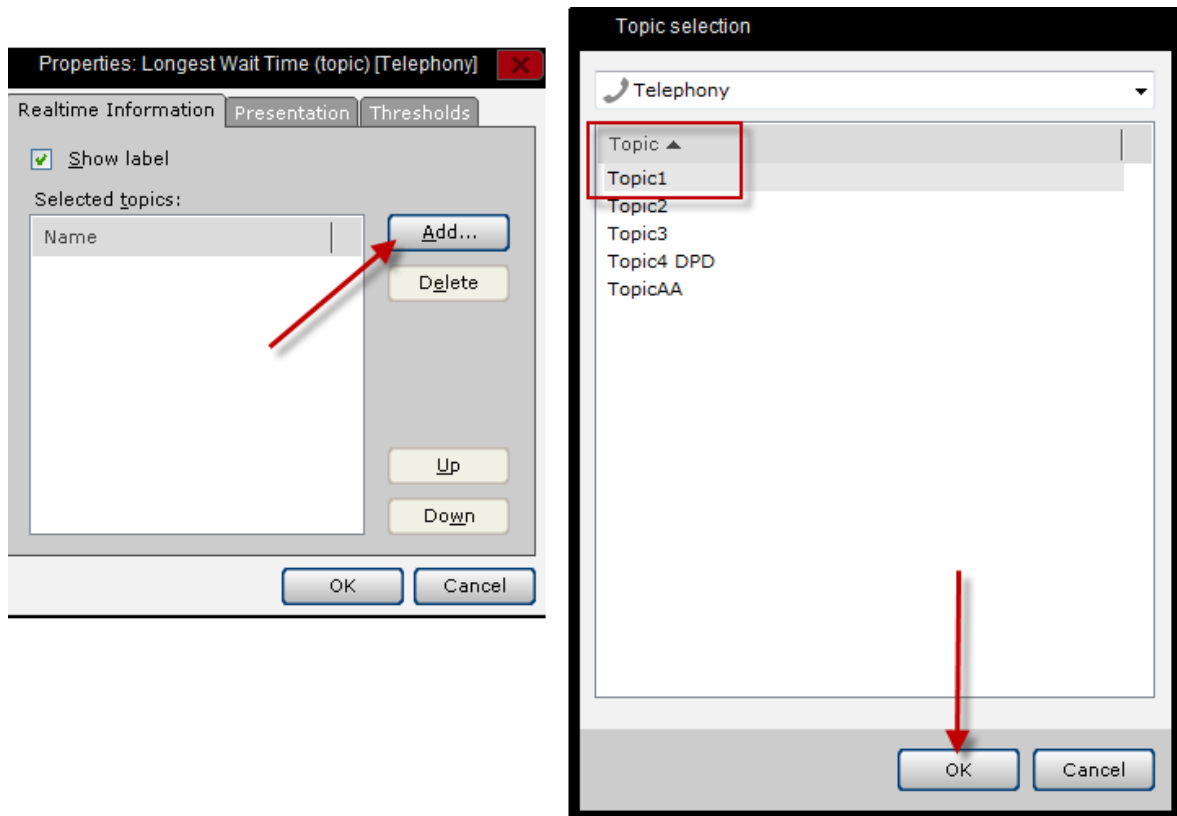


A. Click and drag.

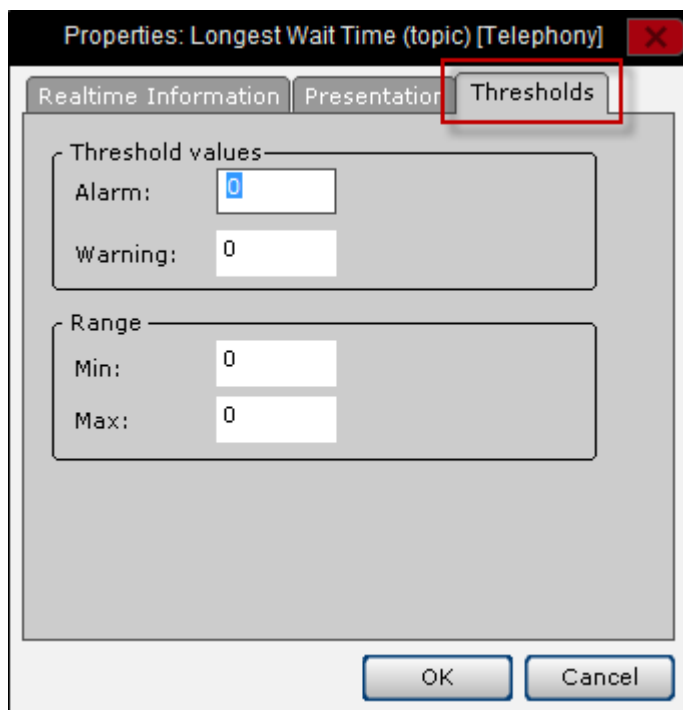
17. The **Properties** dialogue box is displayed.



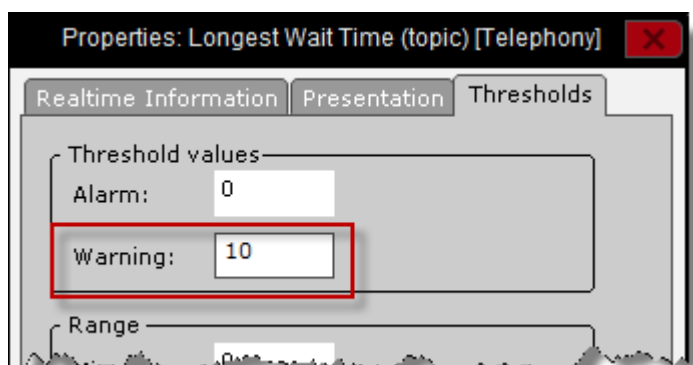
18. Click the **Add** button and select the Topic to be utilized. Click the **OK** button.



19. Click the **Thresholds** tab.

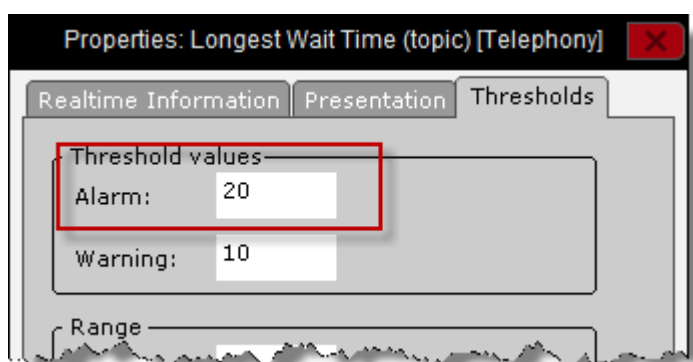


20. From the **Threshold Values** section of the screen, enter a value (in seconds) relating to the length of time a call must queue before a **Warning** is displayed to the agent. This warning will relate to the length of time a call has queued when presented to this Topic. A queued call is not a ringing call, it is a call that has been distributed to an agent's handset, has not been answered and is queuing i.e. is presented for example, with wait music.



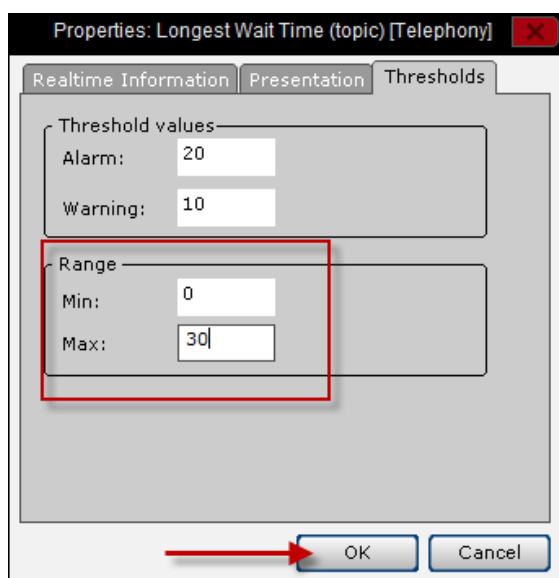
The screenshot shows the 'Properties: Longest Wait Time (topic) [Telephony]' dialog box with the 'Thresholds' tab selected. The 'Threshold values' section contains two input fields: 'Alarm' with a value of 0 and 'Warning' with a value of 10. The 'Warning' field is highlighted with a red rectangular box. Below this section is a 'Range' section with a 'Min' field set to 0.

21. Repeat this process to enter an alarm value.



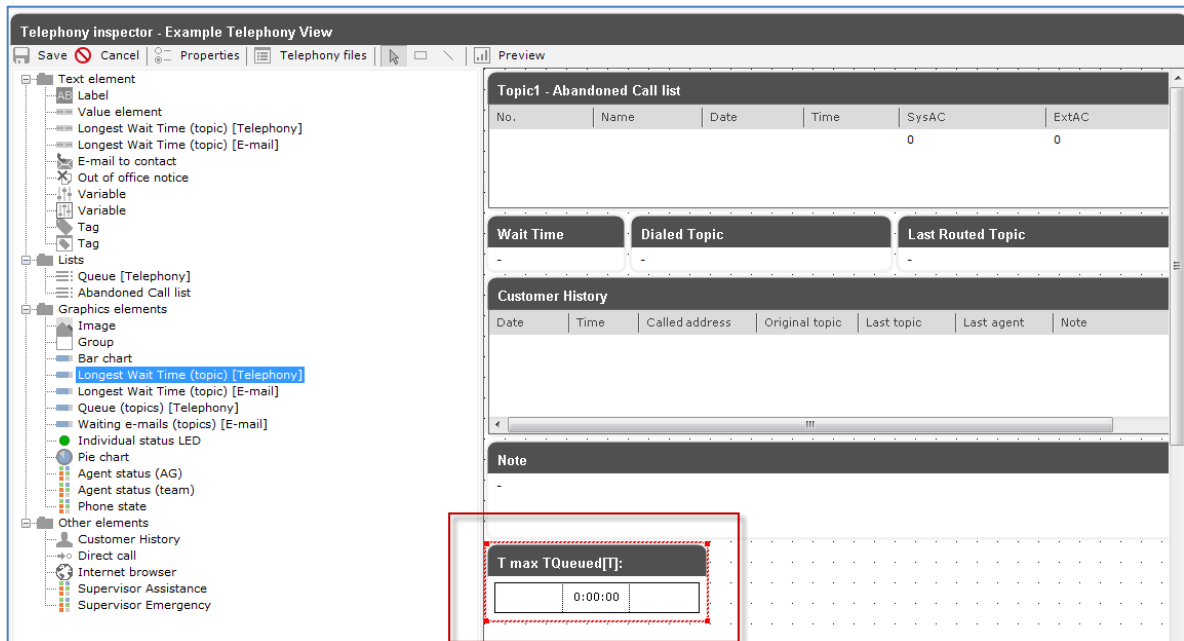
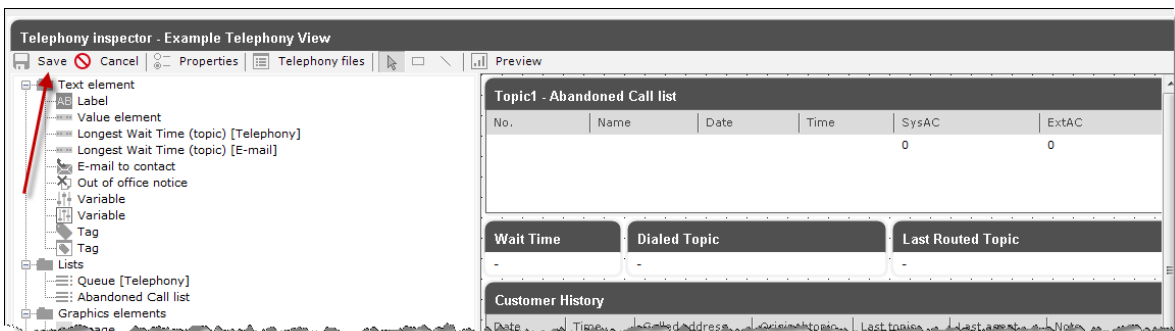
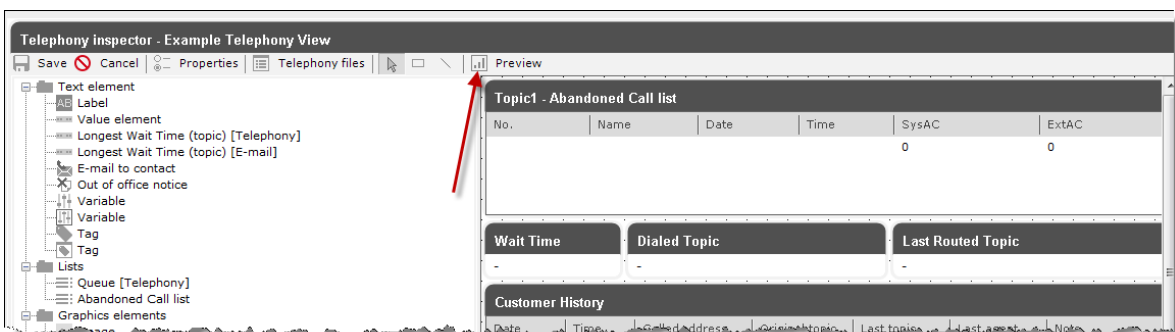
The screenshot shows the same dialog box, but now the 'Alarm' field in the 'Threshold values' section is highlighted with a red rectangular box and contains the value 20. The 'Warning' field still contains the value 10.

22. From the **Range** section of the screen, enter **Min** and **Max** values to determine the length of queued calls to be monitored for this alarm. Click the **OK** button.

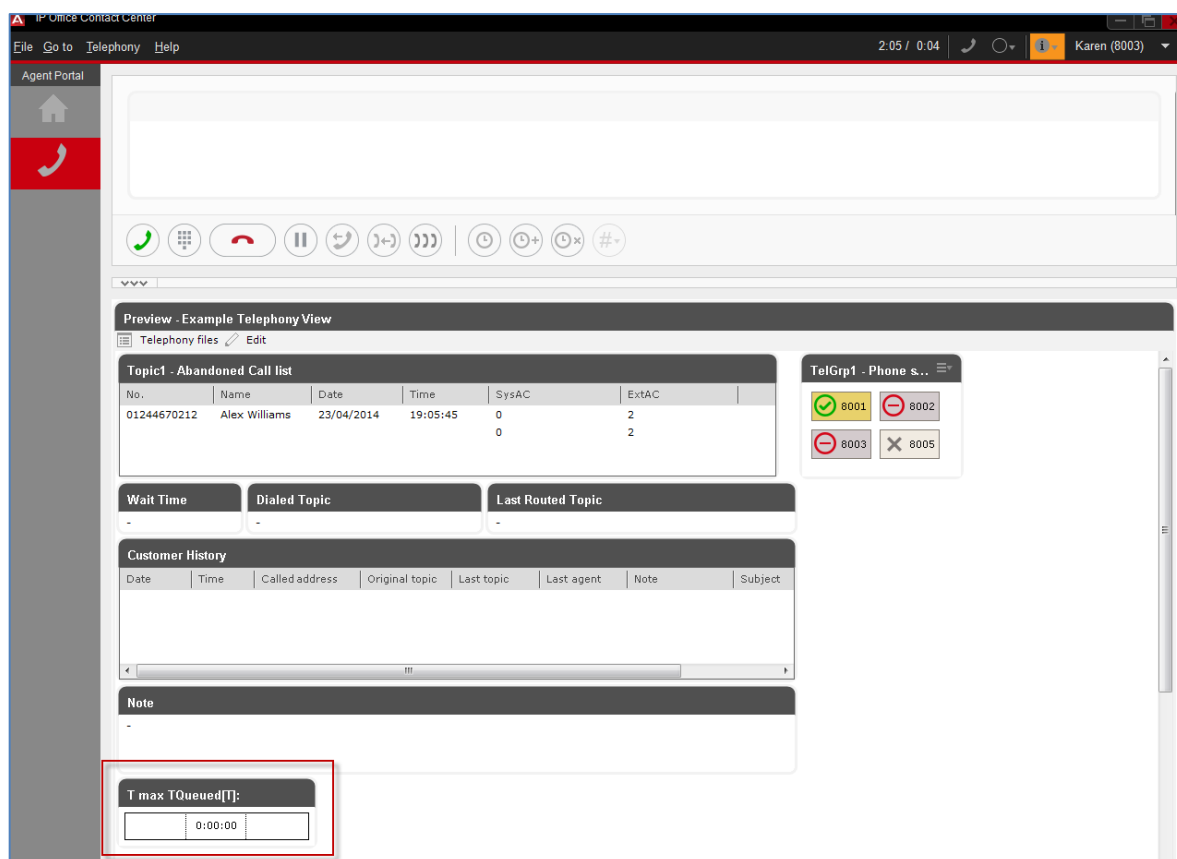


The screenshot shows the dialog box with the 'Range' section highlighted by a red rectangular box. The 'Min' field contains 0 and the 'Max' field contains 30. At the bottom of the dialog, there are 'OK' and 'Cancel' buttons. A red arrow points directly to the 'OK' button.

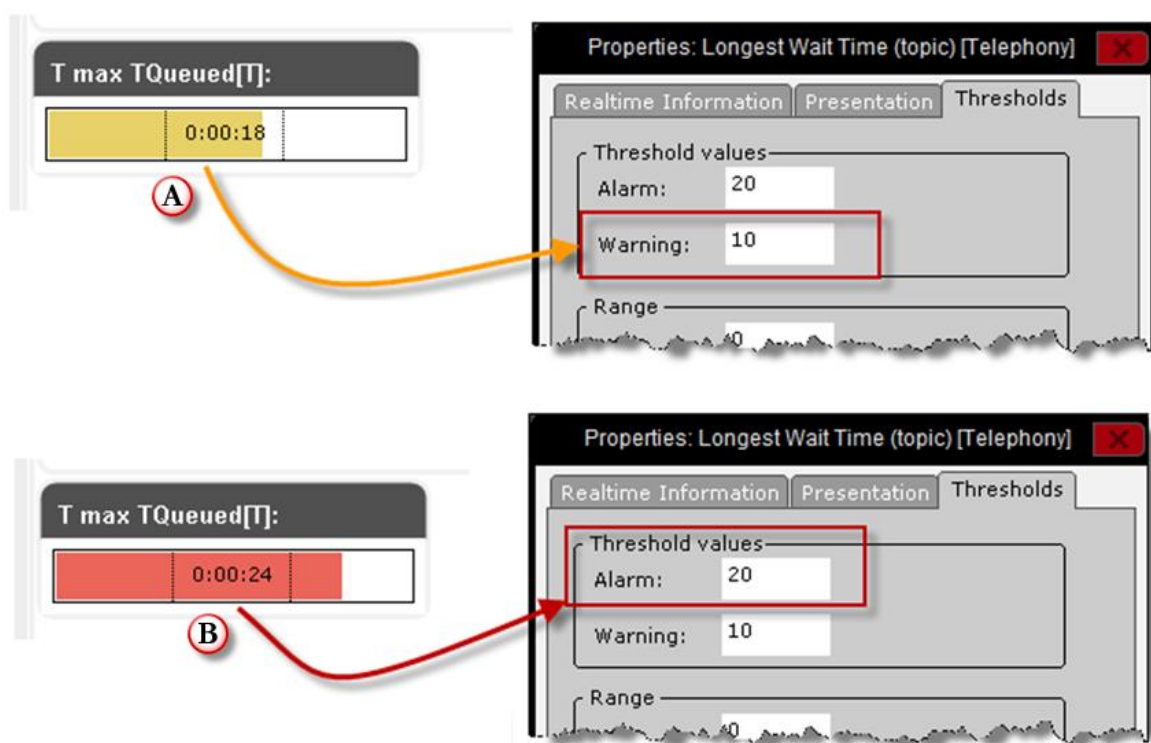
## 23. The configured element is displayed.

24. Click the **Save** button.25. Click the **Preview** button.

## 26. The configured element is displayed.



27. The Warning and Alarm status of queuing calls presented to the Topic will be displayed in real time.



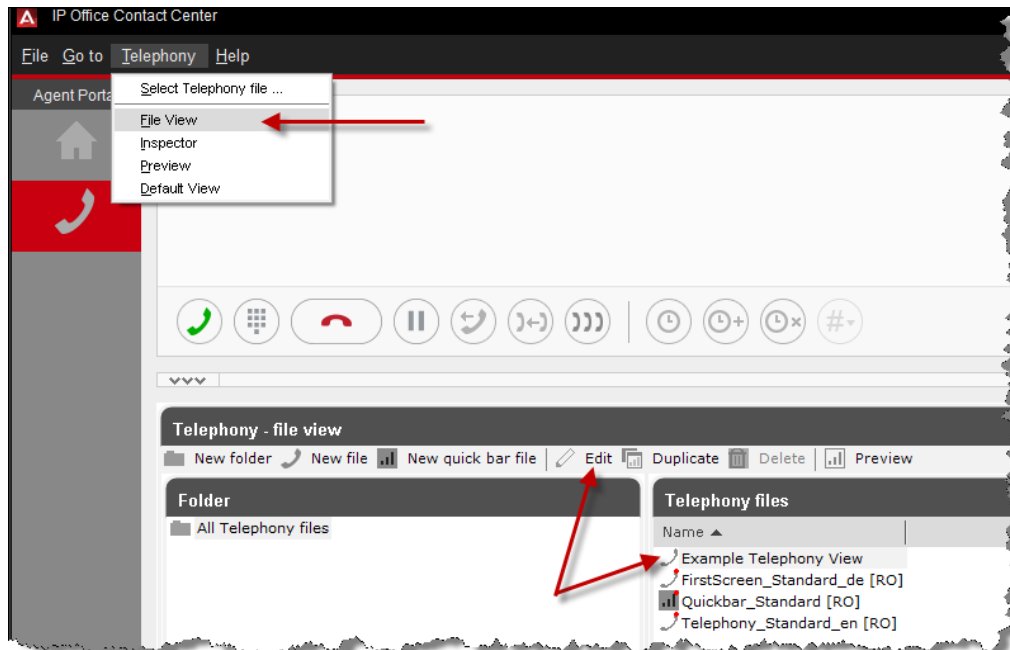
- A. Calls queuing beyond 10 second Warning threshold.
- B. Calls queuing beyond 20 second Alarm threshold

28. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

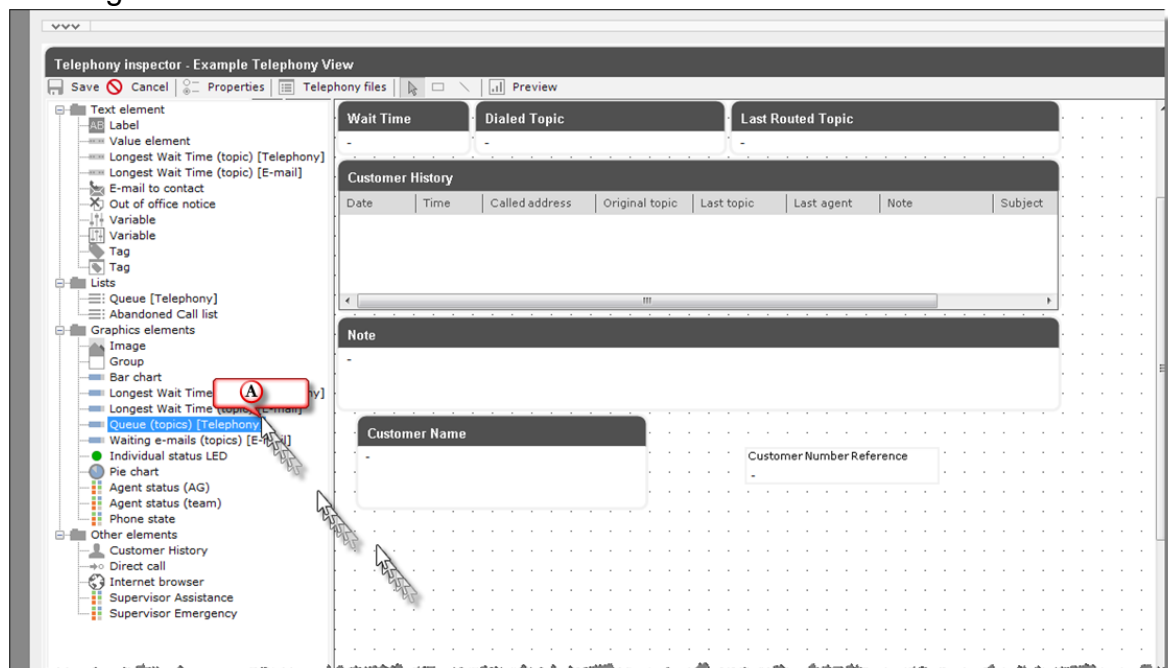
### Adding a Queue (Topic) [Telephony] Element

The Queue (Topic) element can be utilized to generate Warning and Alarm status events, against a defined number of calls that are presented to the Topic and are queuing.

1. Select the duplicated file to be edited, and then click the **Edit** button.

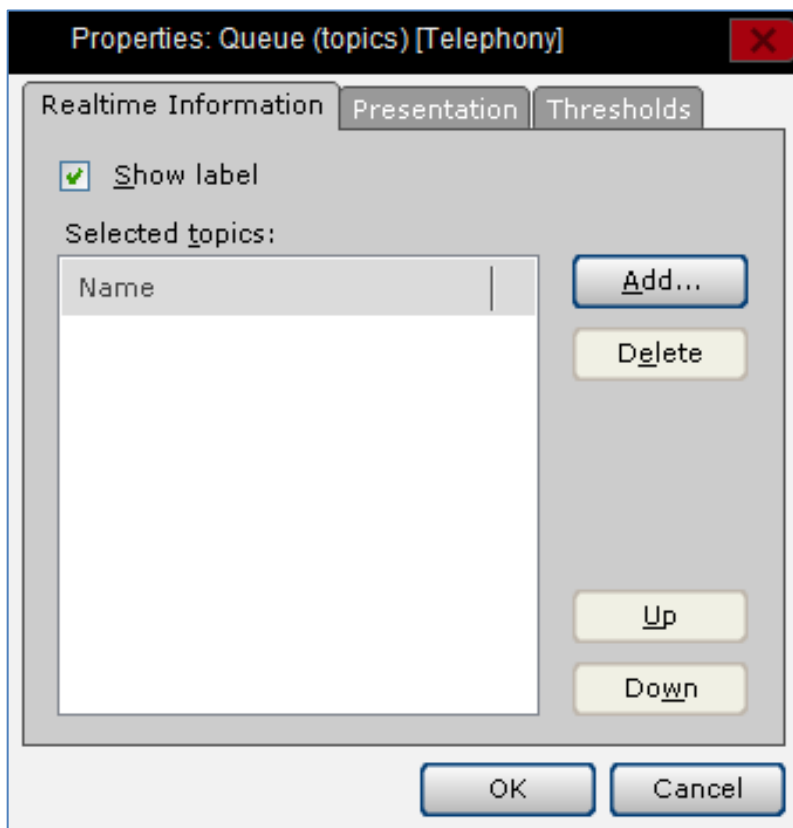


2. Click on the **Queue (Topics) [Telephony]** element and drag it to the Working Area.

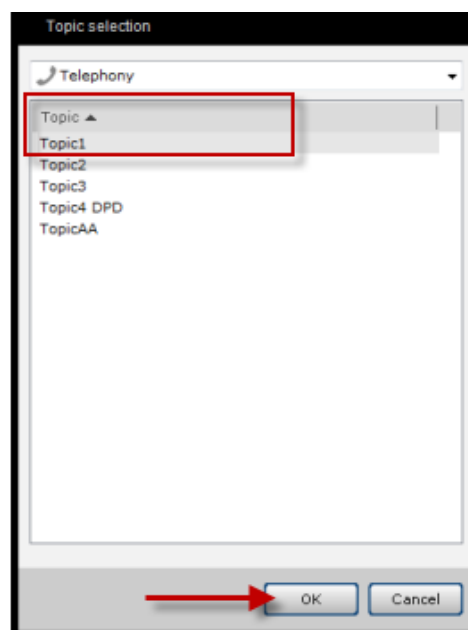
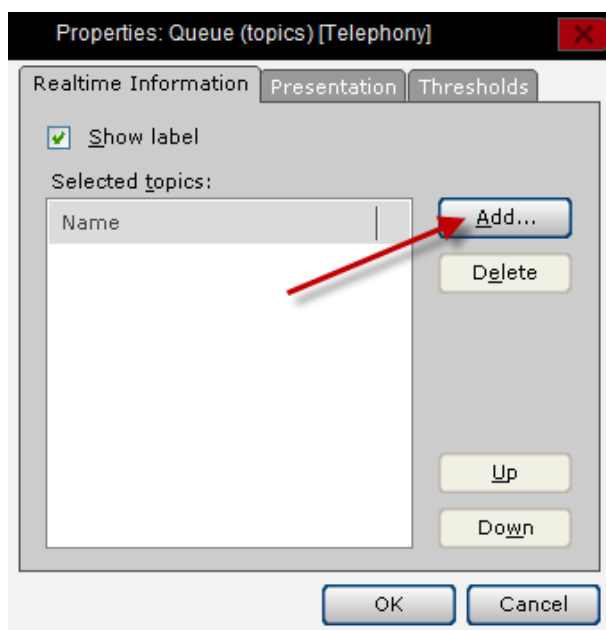


A. Click and drag.

3. The **Properties** dialogue box is displayed.

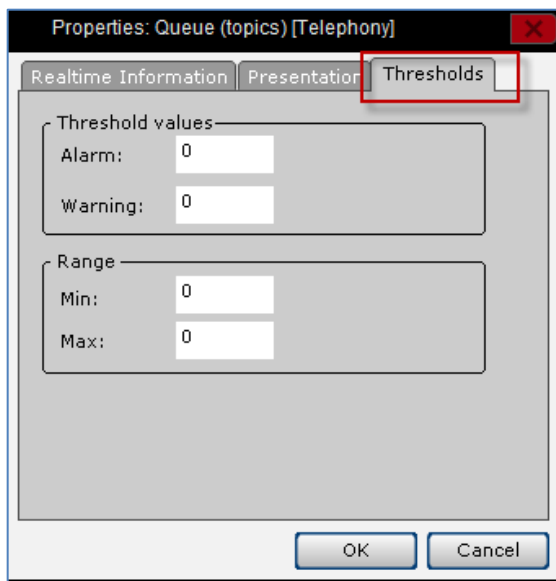


4. Click the **Add** button and select the Topic to be utilized. Click the **OK** button.



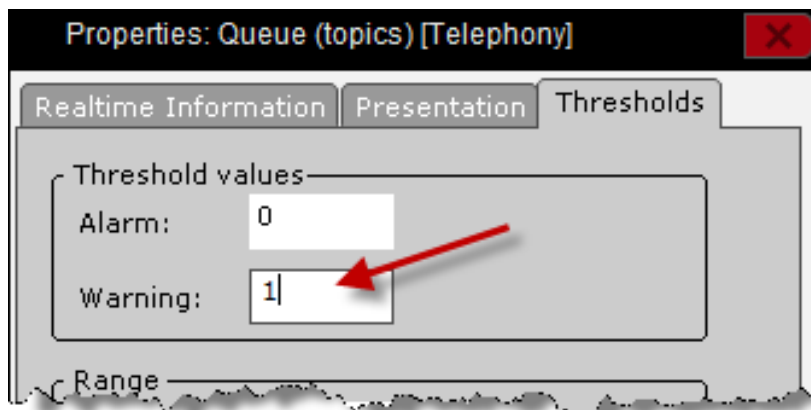


5. Click the **Thresholds** tab.



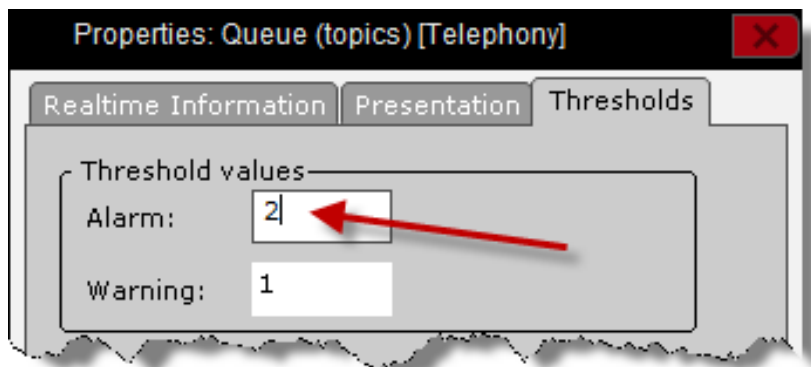
The screenshot shows the 'Properties: Queue (topics) [Telephony]' dialog box with the 'Thresholds' tab selected. The 'Threshold values' section contains two input fields: 'Alarm' with a value of 0 and 'Warning' with a value of 0. Below this, the 'Range' section contains two input fields: 'Min' with a value of 0 and 'Max' with a value of 0. The 'OK' and 'Cancel' buttons are at the bottom right.

6. From the **Threshold Values** section of the screen, enter a value to determine when a warning will be displayed to the agent. This warning will relate to the number of calls queuing that have been presented to this Topic.



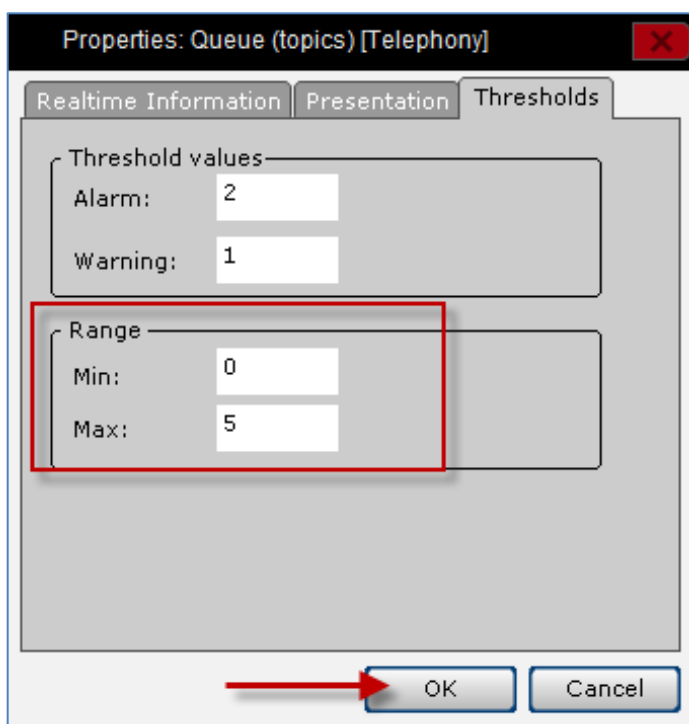
The screenshot shows the 'Properties: Queue (topics) [Telephony]' dialog box with the 'Thresholds' tab selected. The 'Warning' input field now contains the value 1, indicated by a red arrow. The 'Alarm' input field remains at 0.

7. Repeat this process to enter an alarm value.



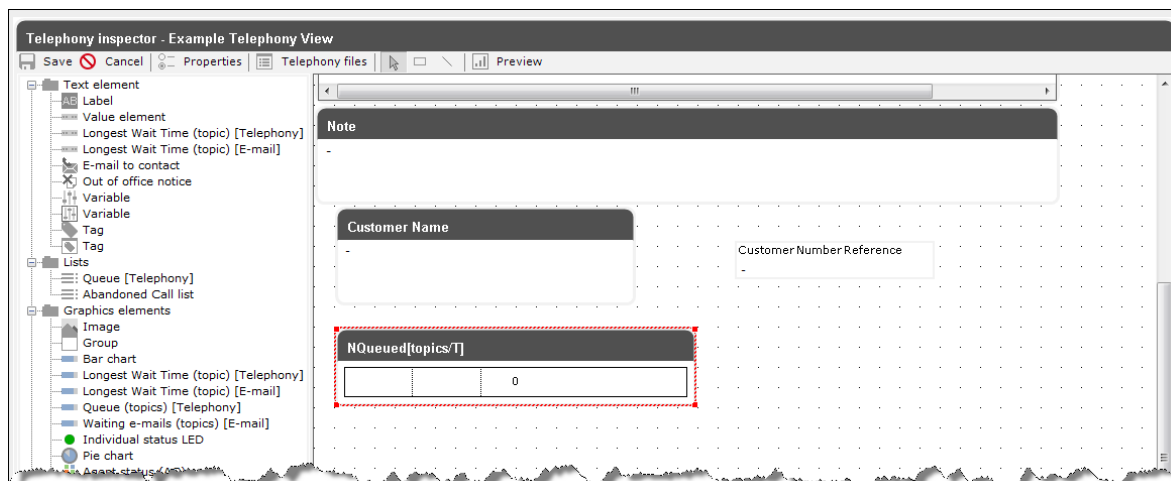
The screenshot shows the 'Properties: Queue (topics) [Telephony]' dialog box with the 'Thresholds' tab selected. The 'Alarm' input field now contains the value 2, indicated by a red arrow. The 'Warning' input field remains at 1.

8. From the **Range** section of the screen, enter **Min** and **Max** values to determine the range of calls to be monitored for this alarm. Click the **OK** button.

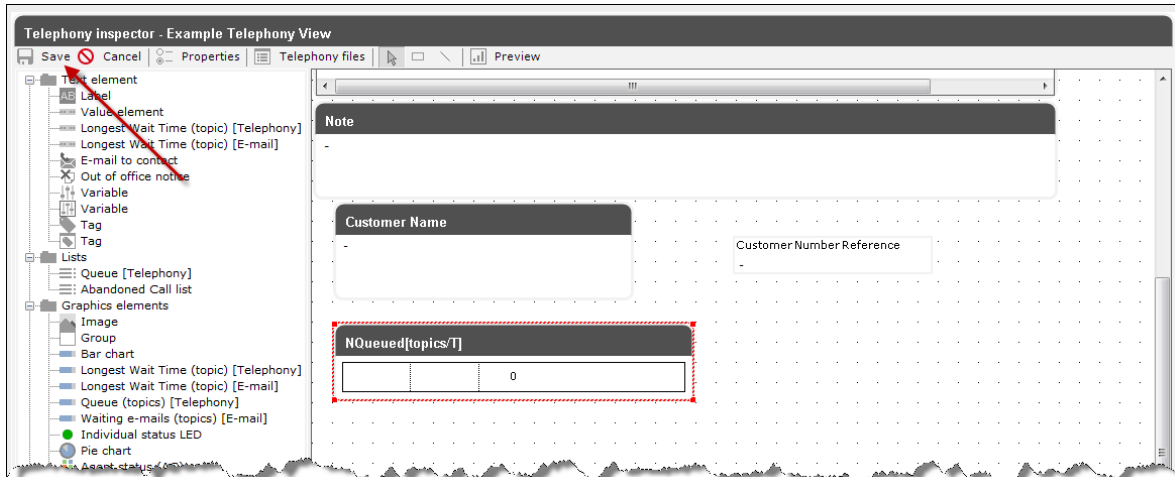


The image shows a dialog box titled "Properties: Queue (topics) [Telephony]". It has three tabs: "Realtime Information", "Presentation", and "Thresholds". The "Thresholds" tab is selected. Inside the dialog, there are two sections. The first section, "Threshold values", has two input fields: "Alarm:" with the value "2" and "Warning:" with the value "1". The second section, "Range", is highlighted with a red rectangle and contains two input fields: "Min:" with the value "0" and "Max:" with the value "5". At the bottom of the dialog, there are "OK" and "Cancel" buttons. A red arrow points to the "OK" button.

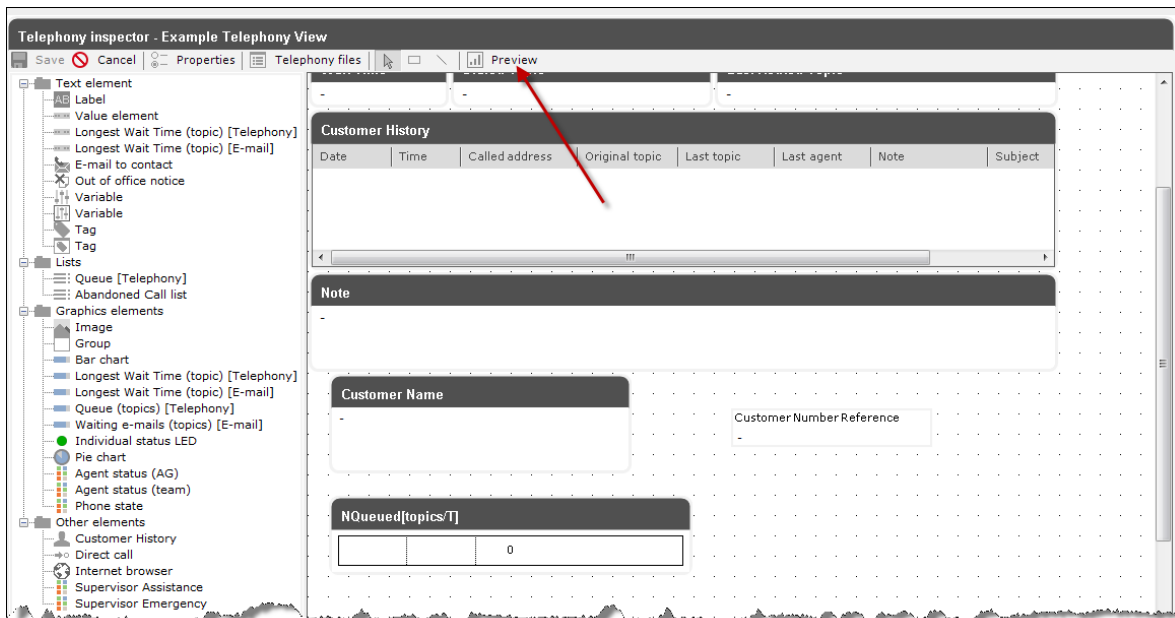
9. The configured element is displayed.



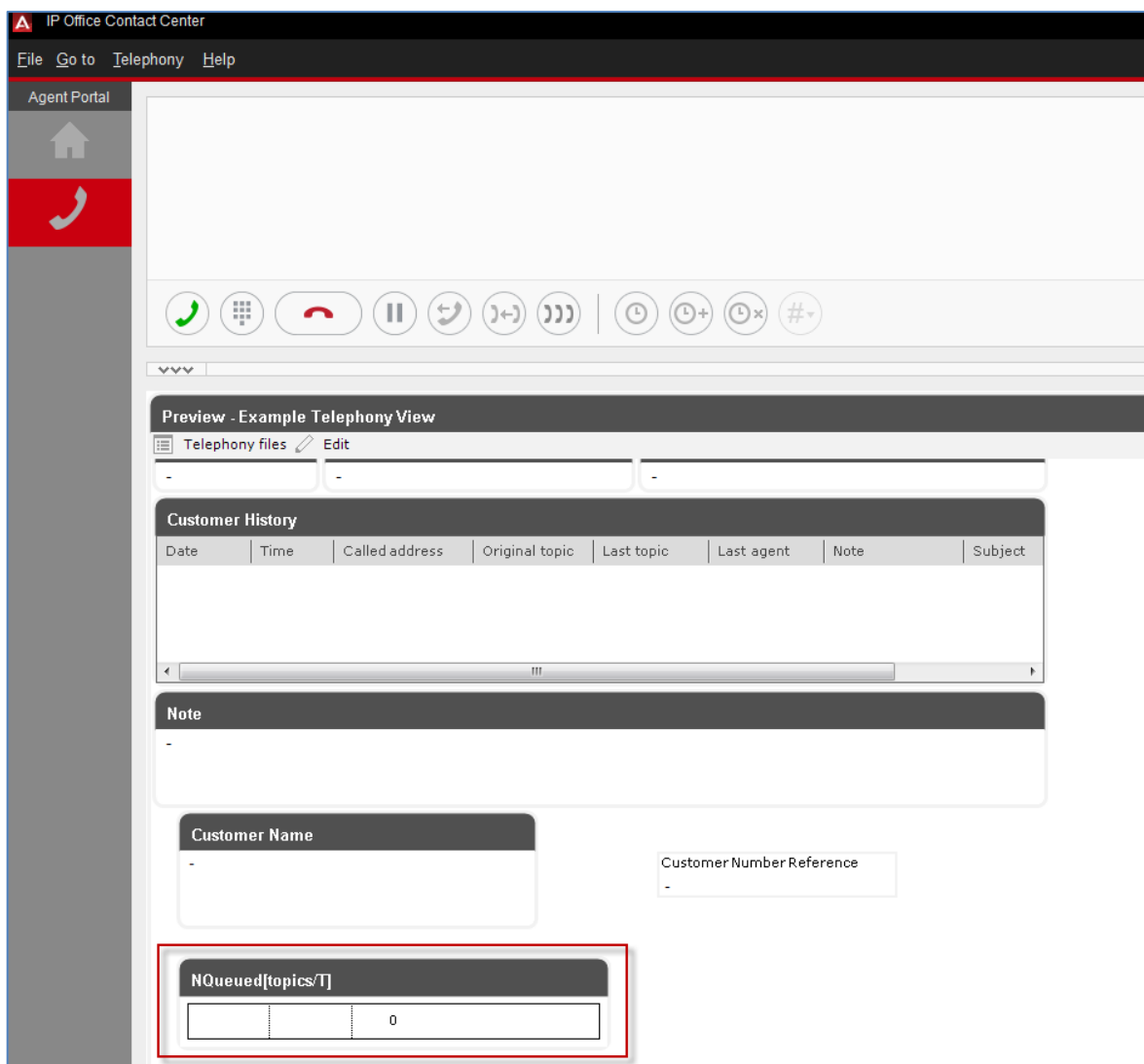
10. Click the **Save** button.



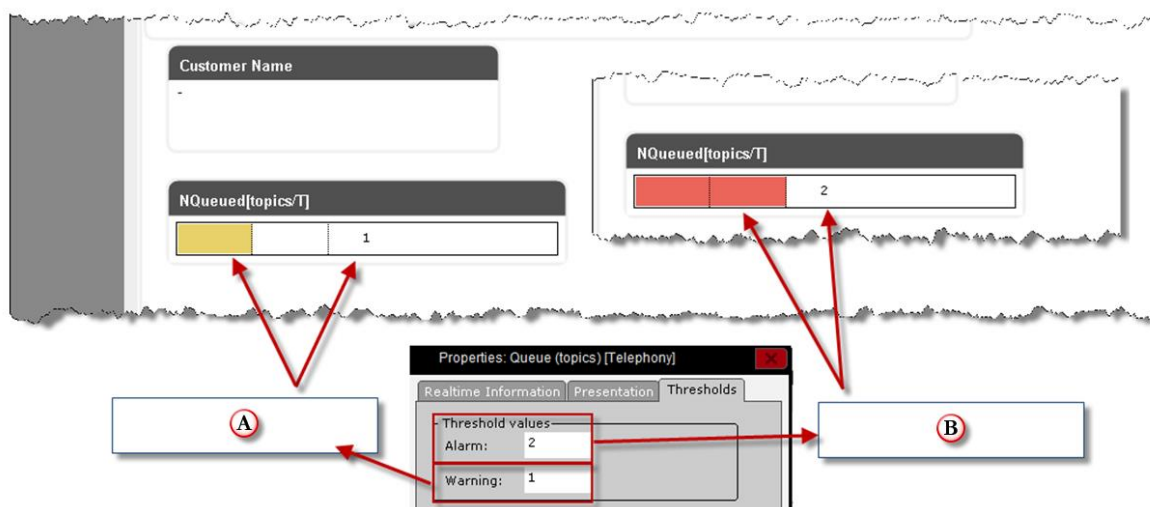
11. Click the **Preview** button.



12. The configured element is displayed.



13. The Warning and Alarm status of calls presented to the Topic will be displayed in real time.



- A. Warning: 1 call queuing
- B. Alarm: 2 calls queuing

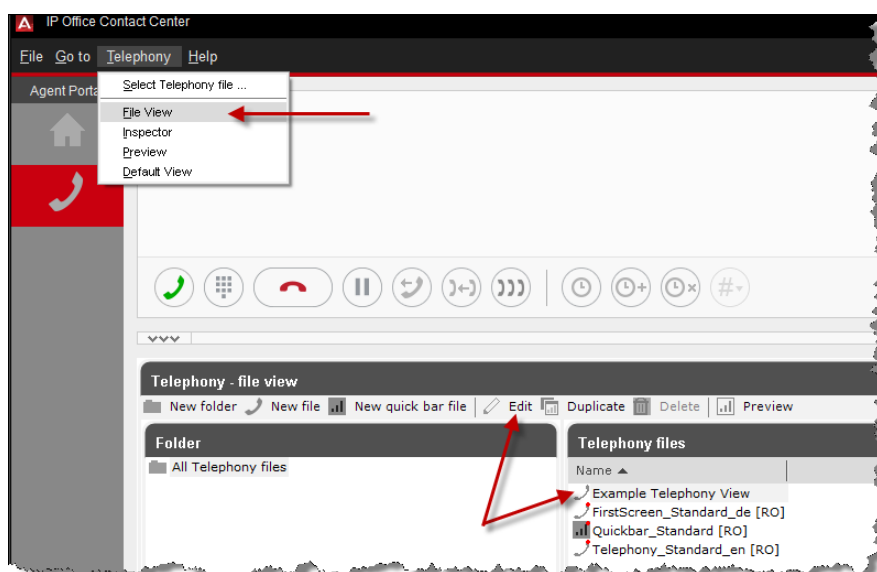
14. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Adding an Individual Status LED (Alarm)

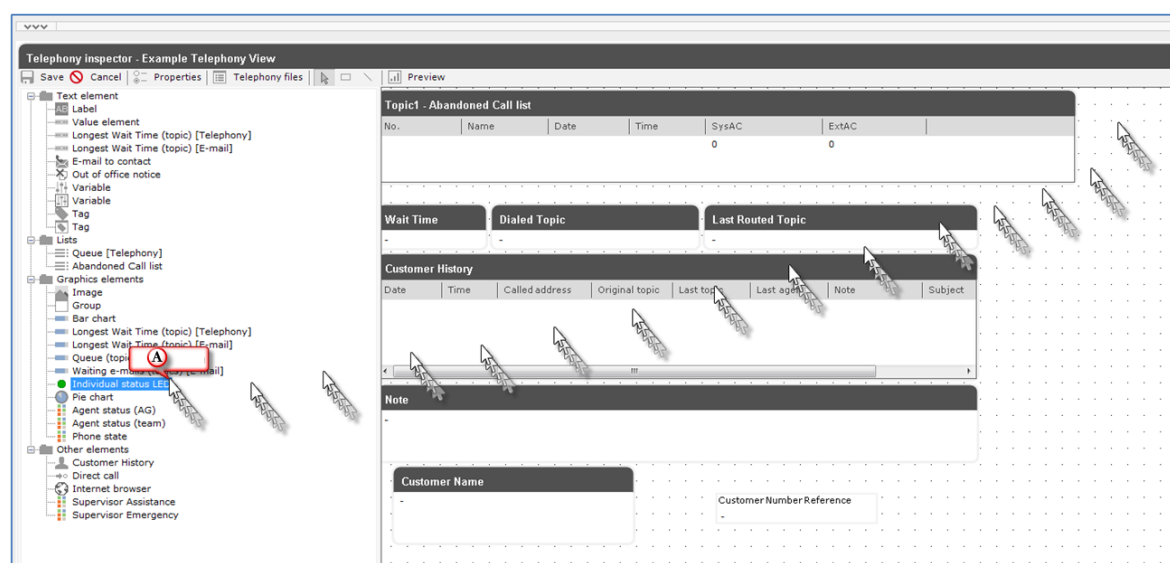
The Individual Status LED element can be utilized to generate alarms against calls that are presented to the Topic. For example, an alarm status can be set that will be triggered when the number of abandoned calls goes beyond configured Warning and Alarm thresholds.

To add an Individual Status LED:

1. Select the duplicated file to be edited, and then click the **Edit** button.

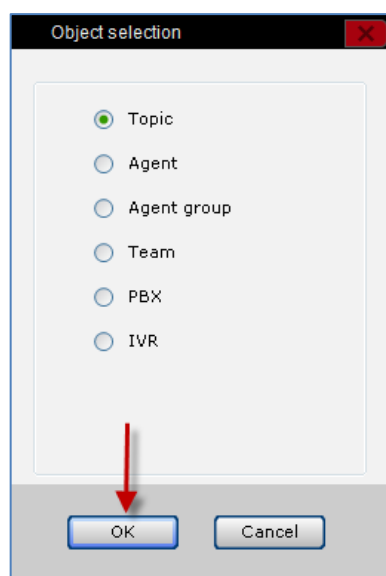


2. Click and drag the **Individual Status LED** element to the Working Area.

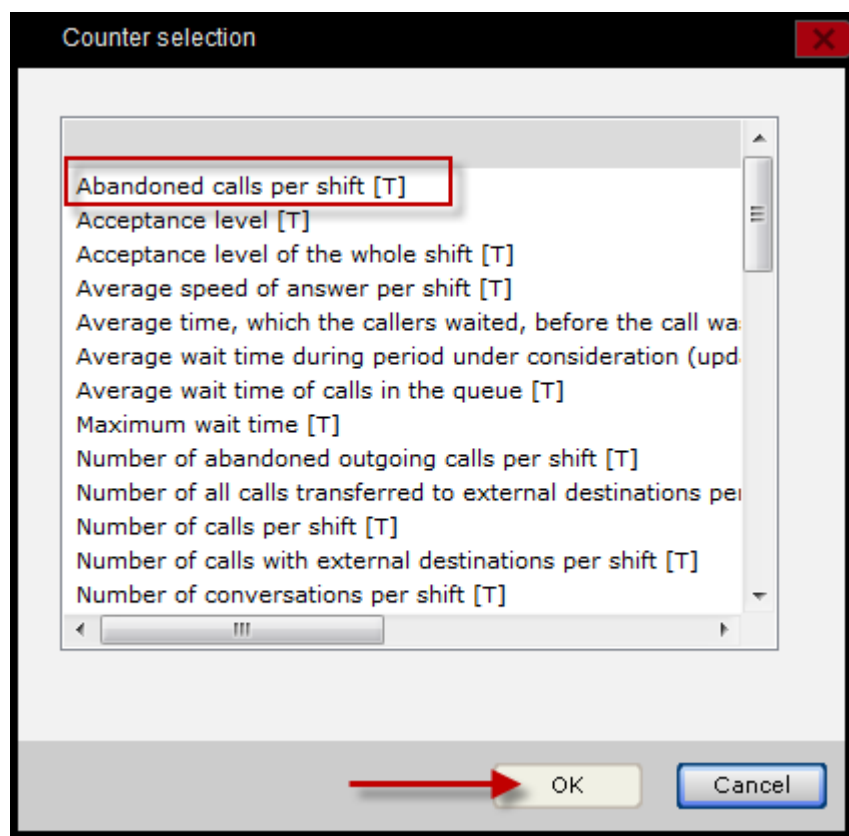


- A. Click and drag.

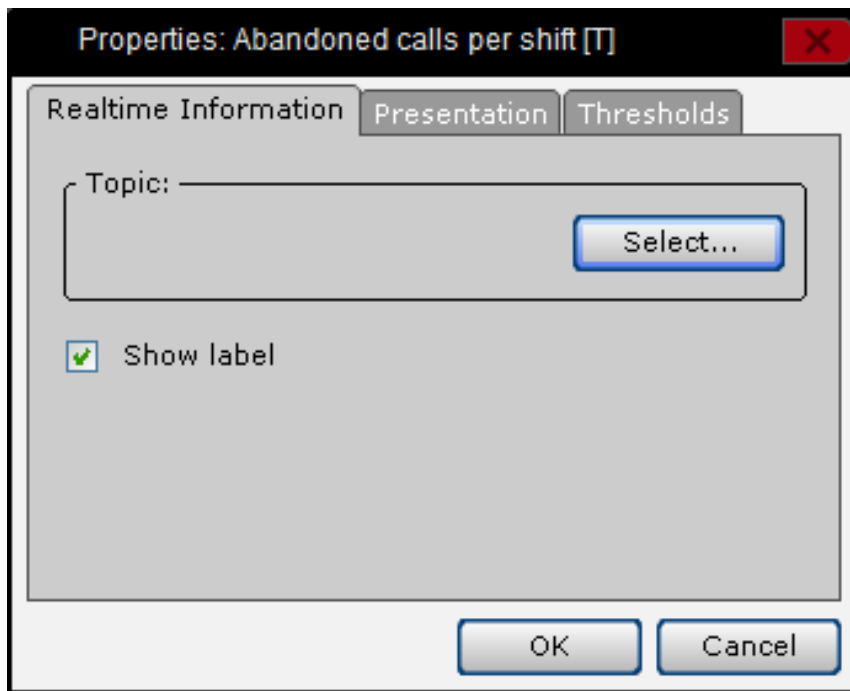
3. The **Object Selection** window is displayed. Select the required object. In this example, the Topic object has been selected. Click the **OK** button.



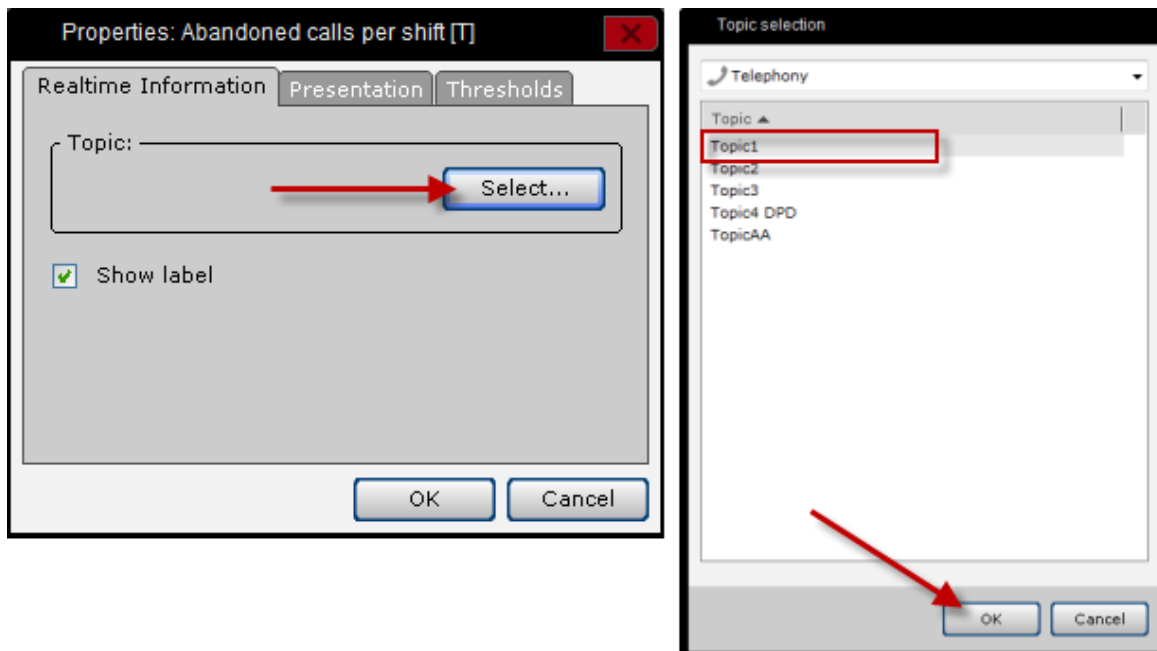
4. The **Counter Selection** window is displayed. Within this window there are a large number of Counters that can be selected. In this example the **Abandoned Calls Per Shift** counter has been selected. Click the **OK** button.



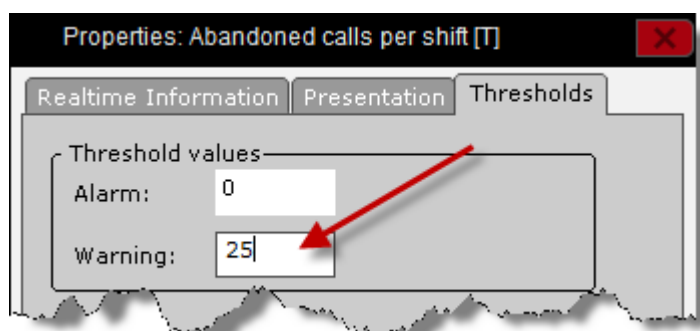
5. The **Properties** dialogue box is displayed.



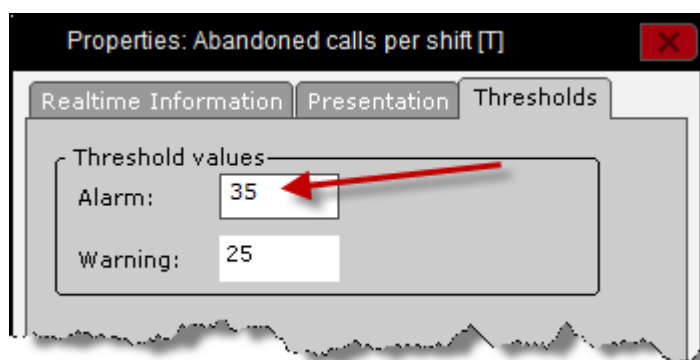
6. Click the **Select** button and select the Topic to be utilized. Click the **OK** button.



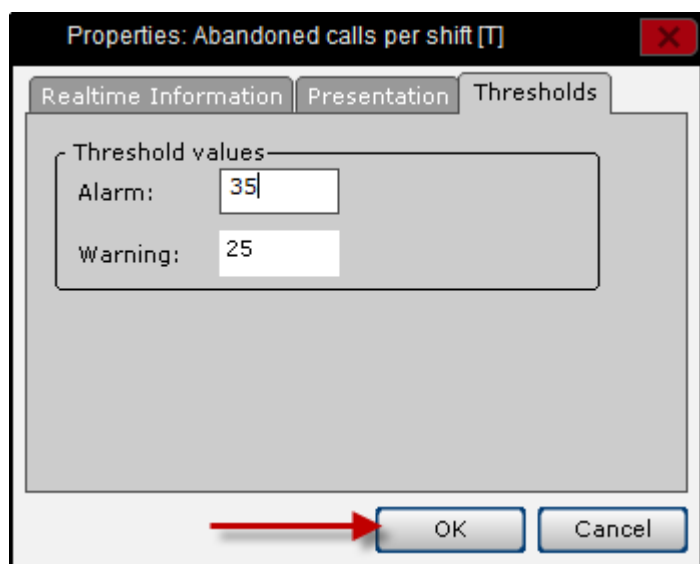
7. Click the **Thresholds** tab. From the **Threshold Values** section of the screen, enter a value to determine when a warning will be displayed to the agent. This warning will relate to a defined number of calls to the Topic that have been abandoned.



8. In the **Alarm** field, enter a value to determine when the number of abandoned calls will be displayed in an alarm state.

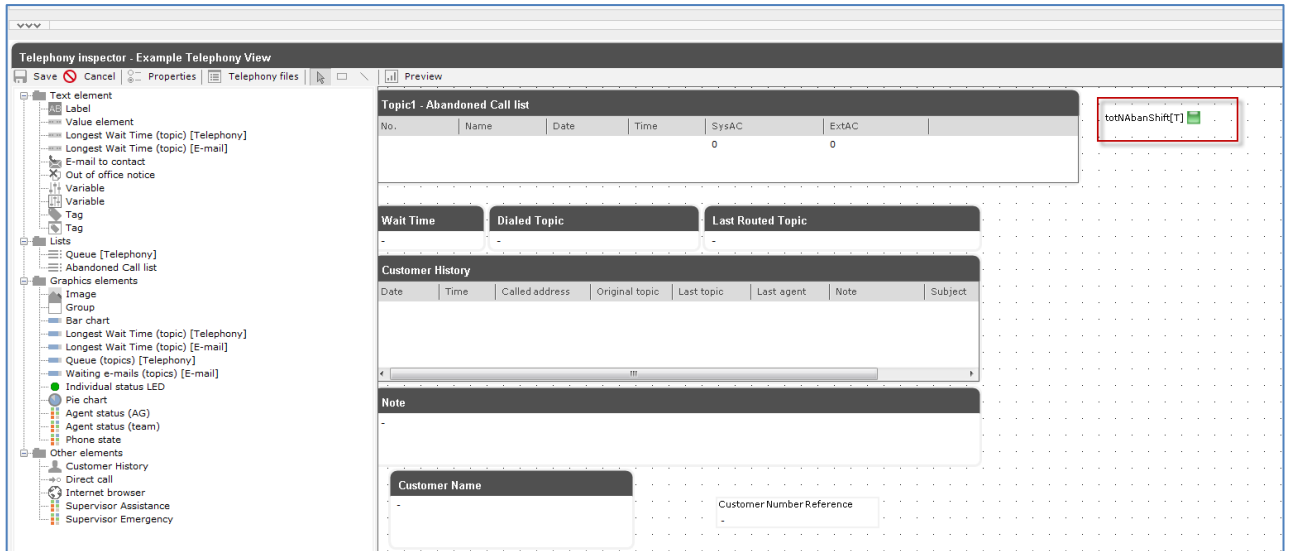


9. Click the **OK** button.

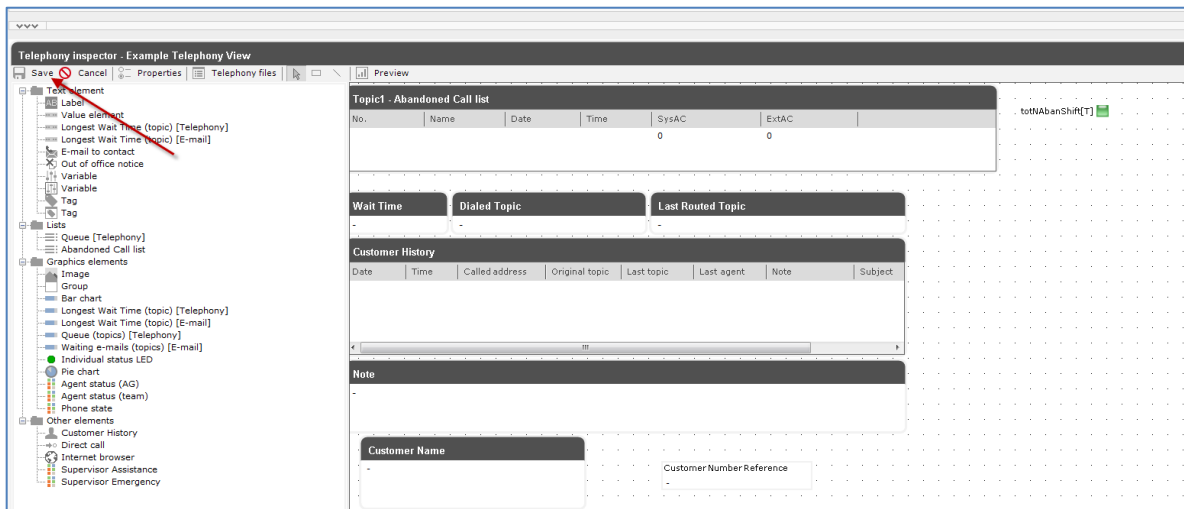


10. The configured element is displayed.

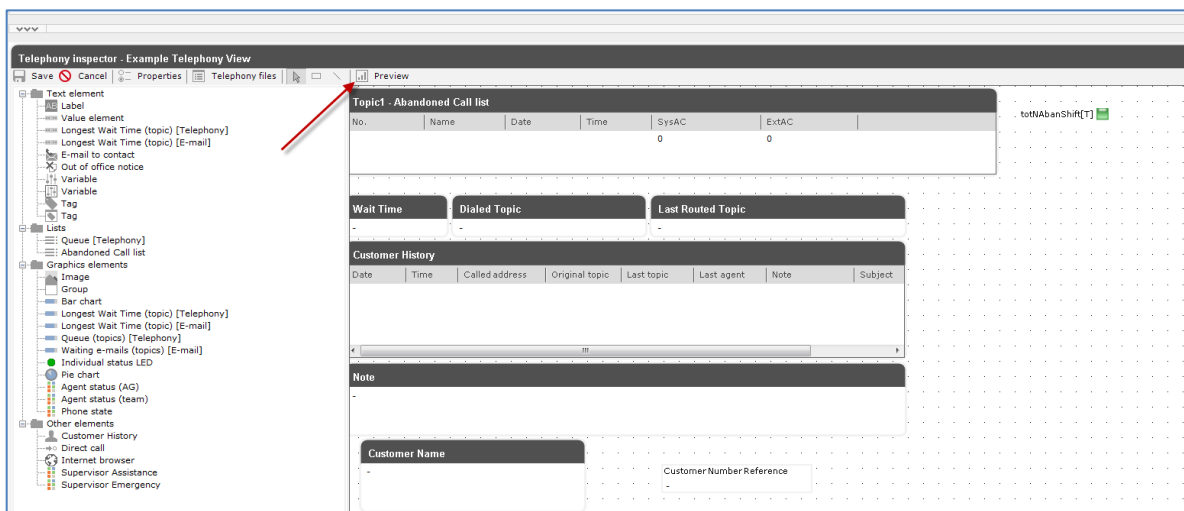




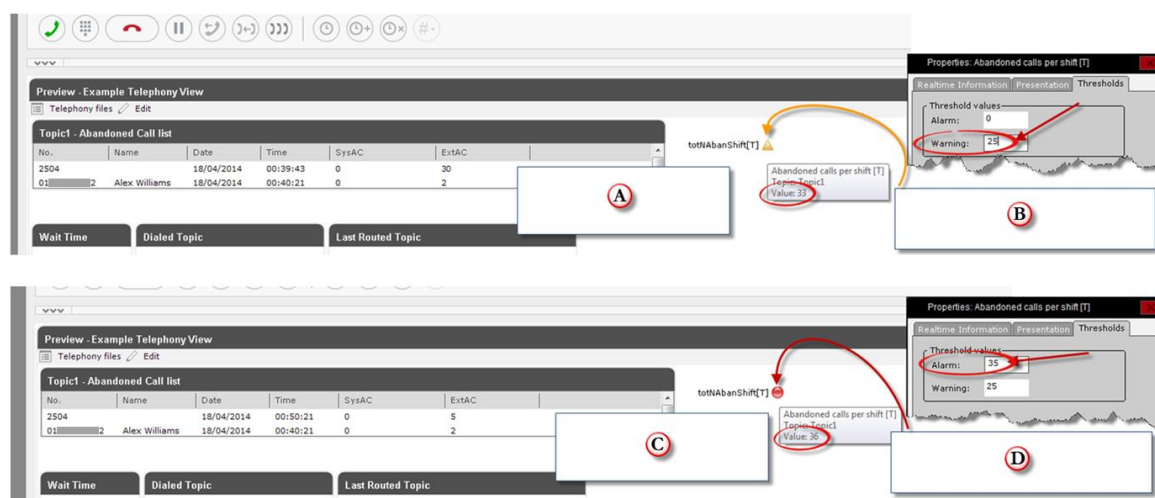
11. Click the **Save** button.



12. Click the **Preview** button.



13. The elements icon will change, as the number of abandoned calls goes beyond the Warning and Alarm Threshold.



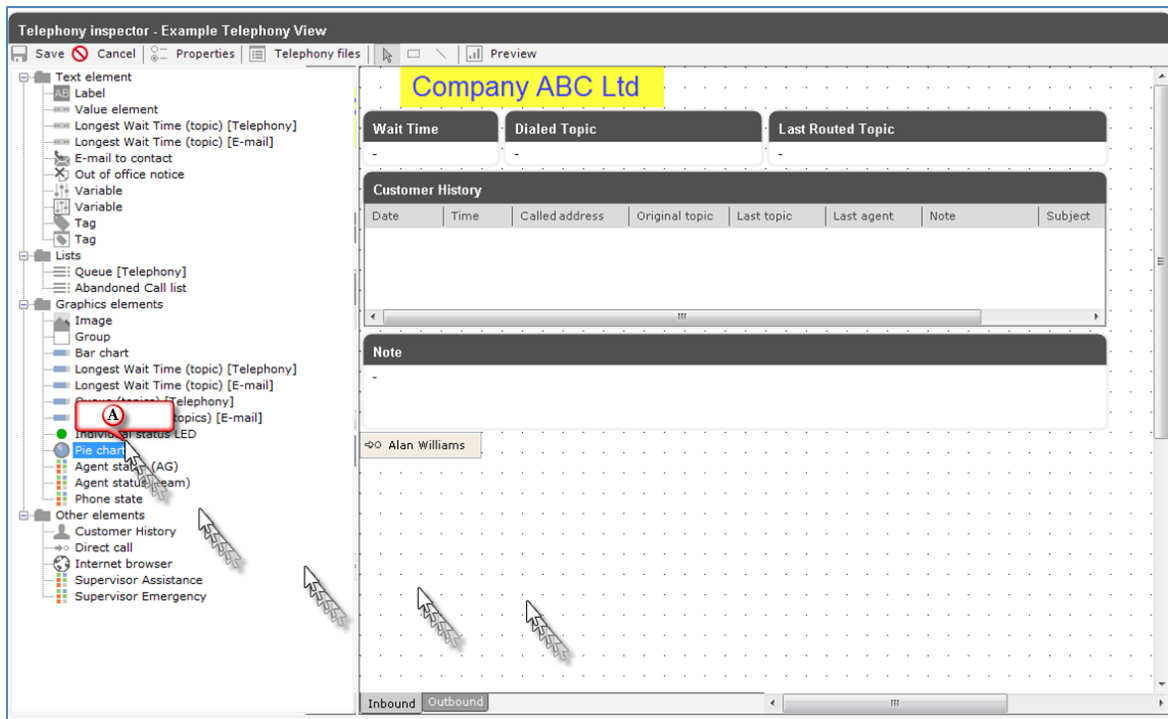
- The number of abandoned calls beyond that are beyond the Warning Threshold of 25
- The abandoned calls per shift are displayed when the mouse is hovered over the icon.
- The number of abandoned calls beyond that are beyond the Alarm Threshold of 35.
- The abandoned calls per shift are displayed when the mouse is hovered over the icon.

14. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

### Adding a Pie Chart element to the Telephony View

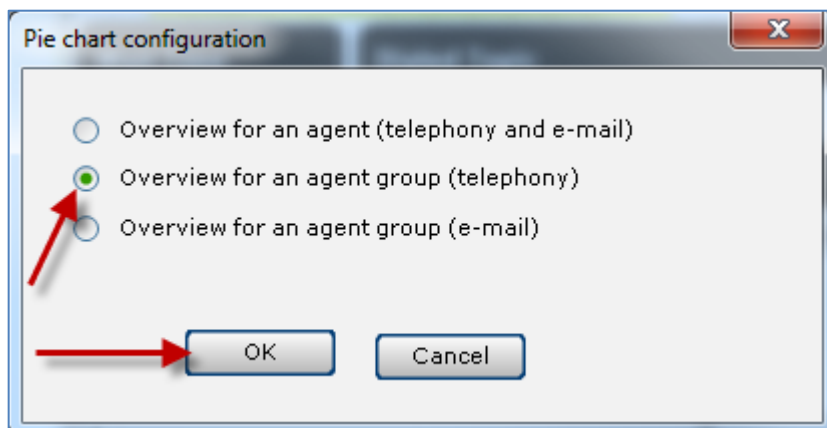
A pie chart can be added to the Telephony view to provide a graphical overview of the status of a configured Agent Group.

1. Select the **Pie Chart** element and drag it to the Working Area.

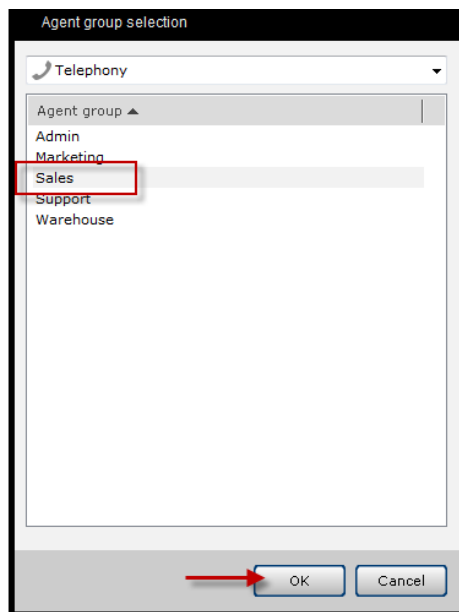
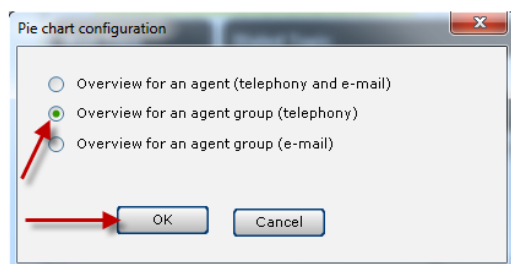


A. Click and drag.

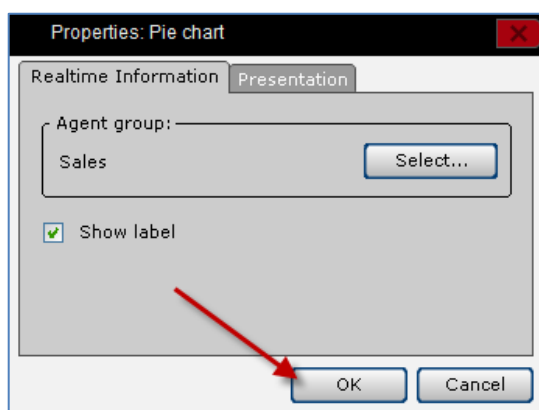
2. The **Pie Chart Configuration** dialogue box is displayed. Select the required configuration option and click the **OK** button.



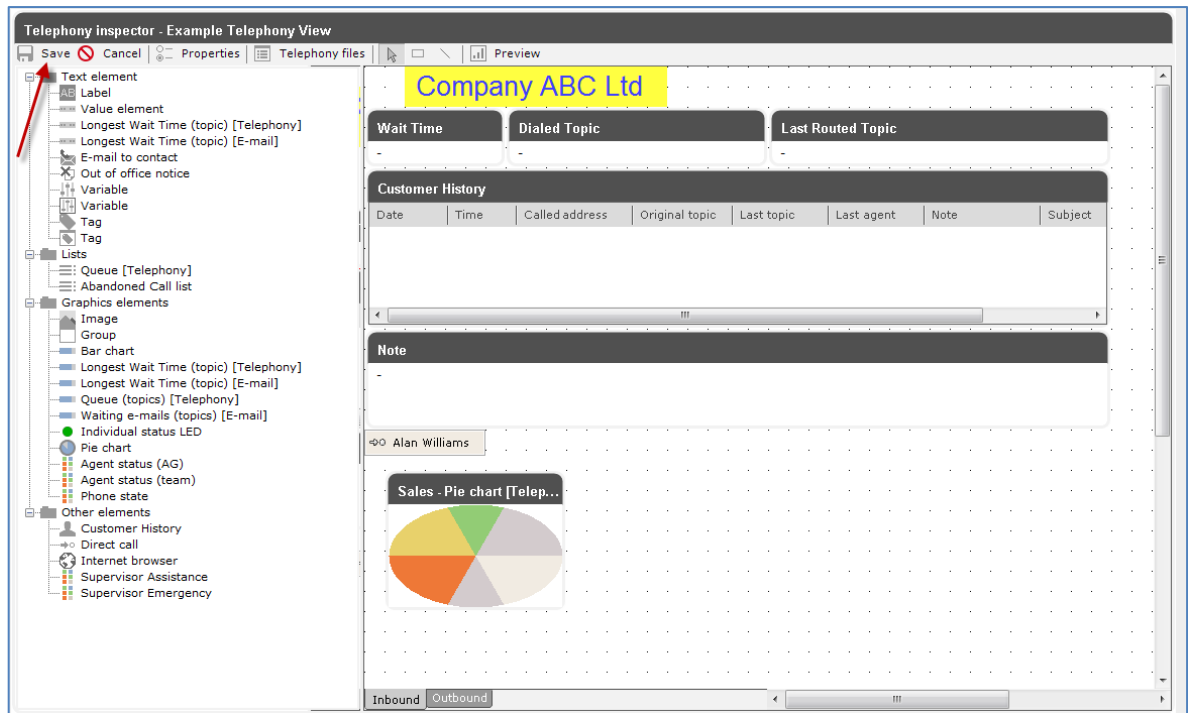
3. The **Properties** dialogue box is displayed. Click the **Select** box and select the agent group to be referenced in the pie chart. Click the **OK** button.



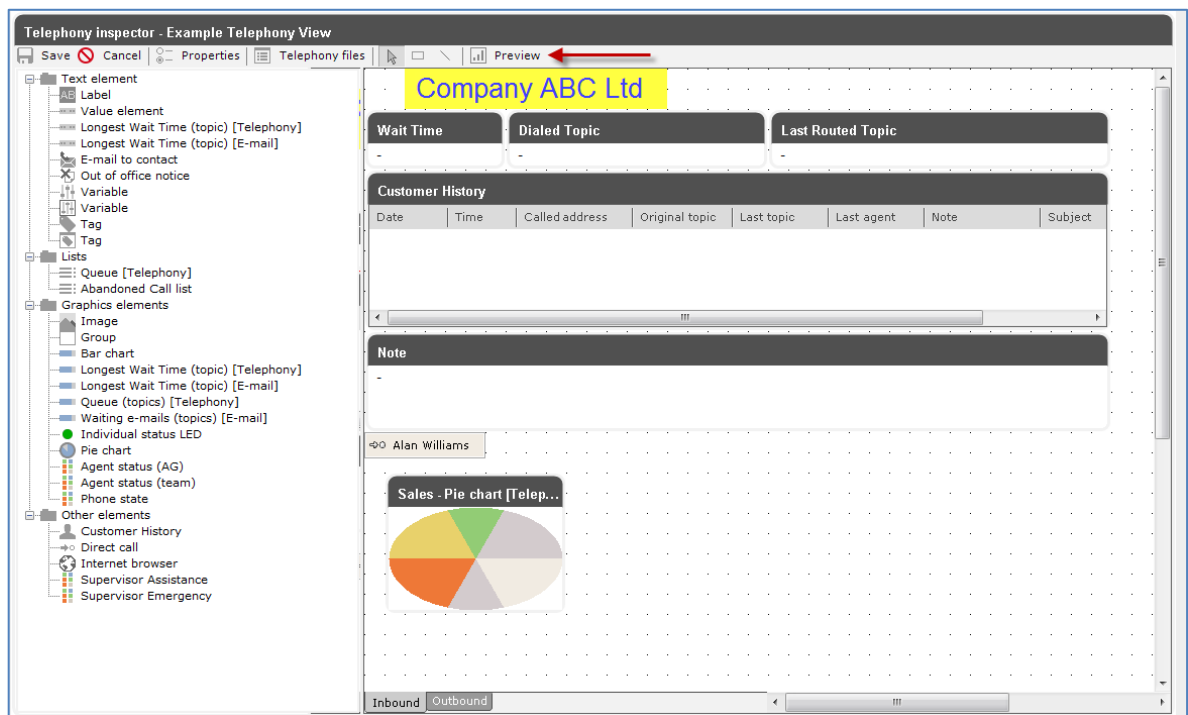
4. Click the **OK** button.



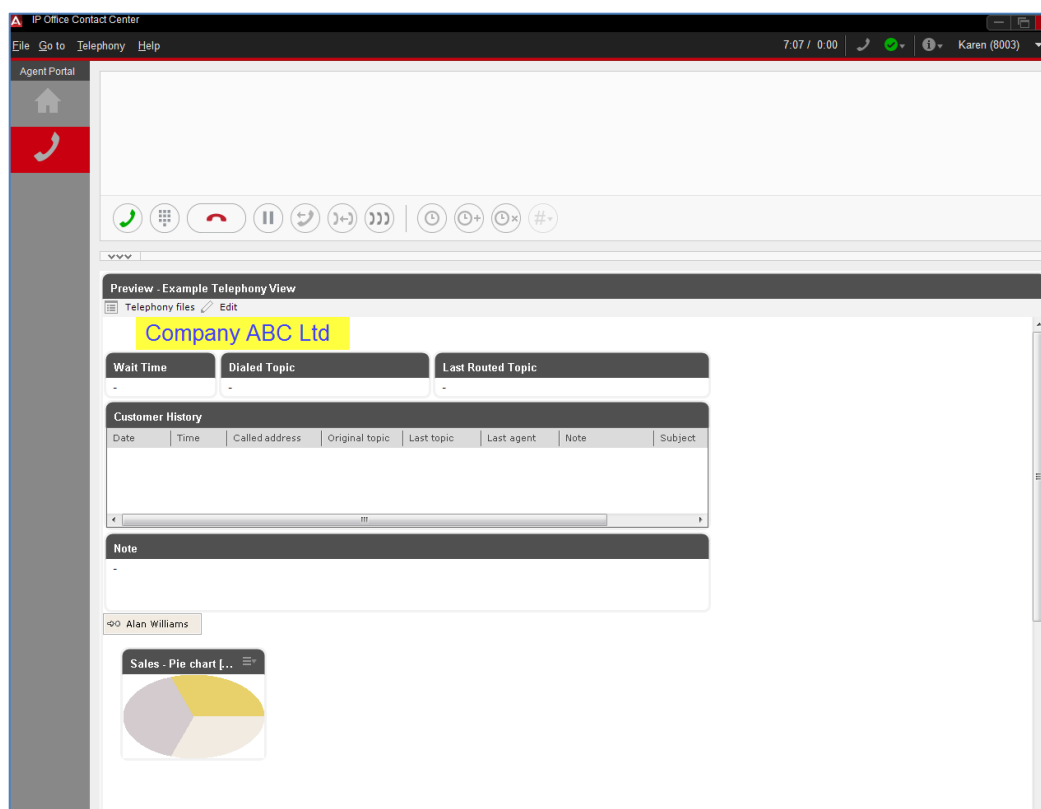
5. Click the **Save** button.



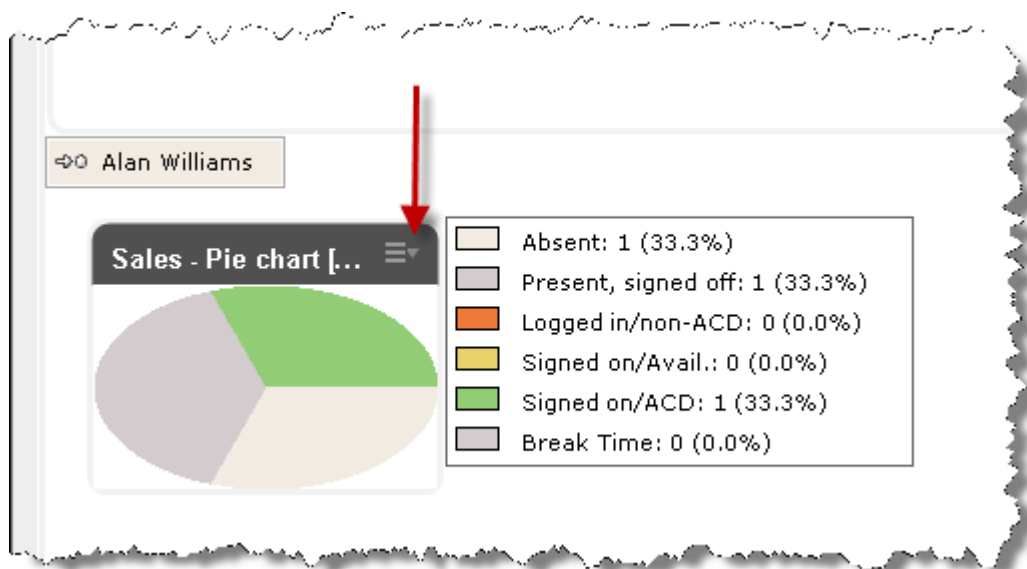
6. Click the **Preview** button.



7. The Pie chart element is displayed.



8. Click on the drop down box to display a legend.



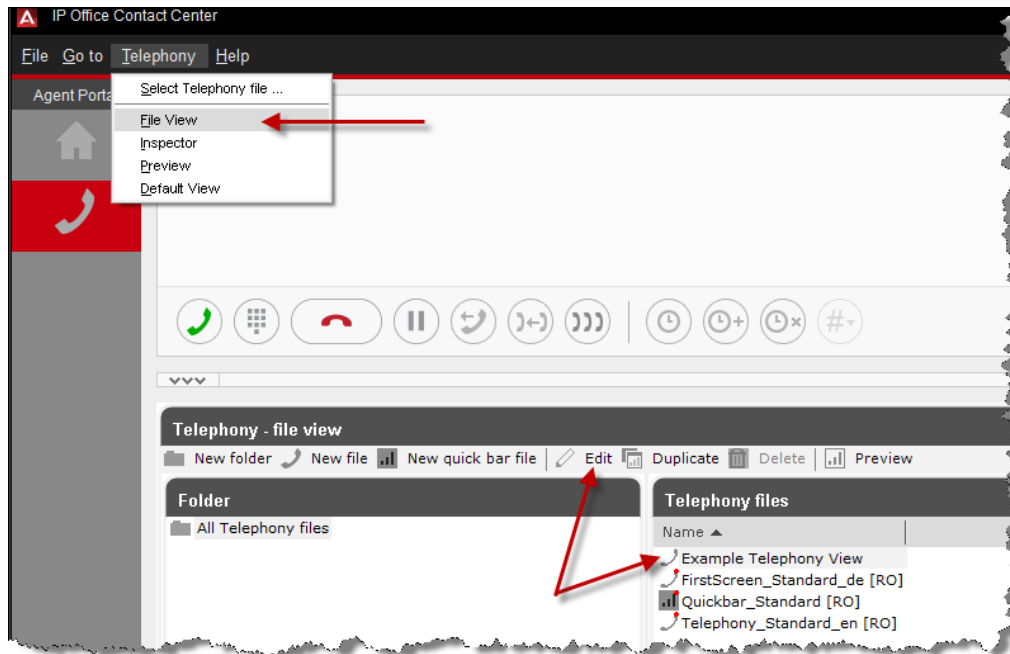
9. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Adding an Agent Status (AG) Element to the Telephony View

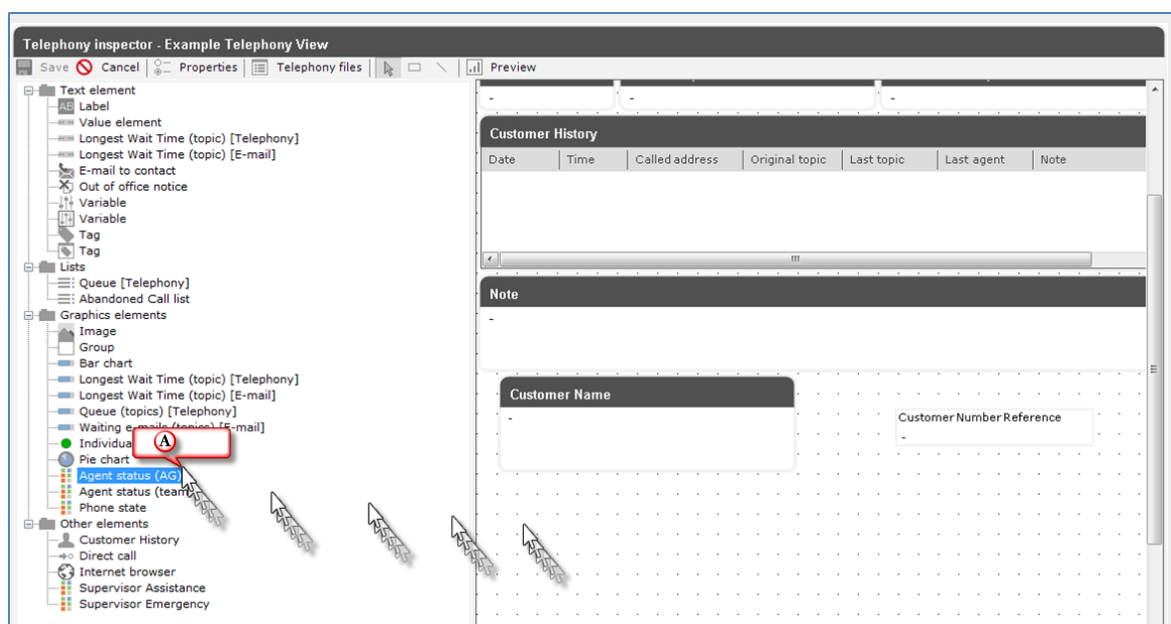
Agent Status (Agent Group) elements allows the IP Office Contact Center user to view information for example, relating to all agents or all signed in agents. It is a useful element for both supervisors and agents, as it allows the status of individual agents to be displayed.

To add an Agent Status (AG) Element:

1. Select the duplicated file to be edited, then click the **Edit** button.

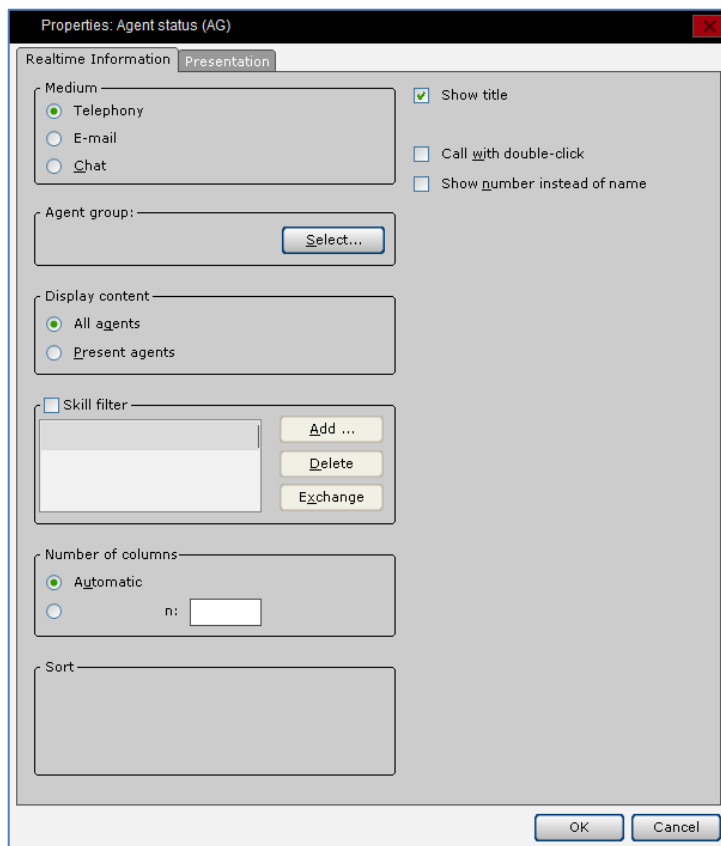


2. Click on the **Agent Status (AG)** element and drag it to the Working Area.

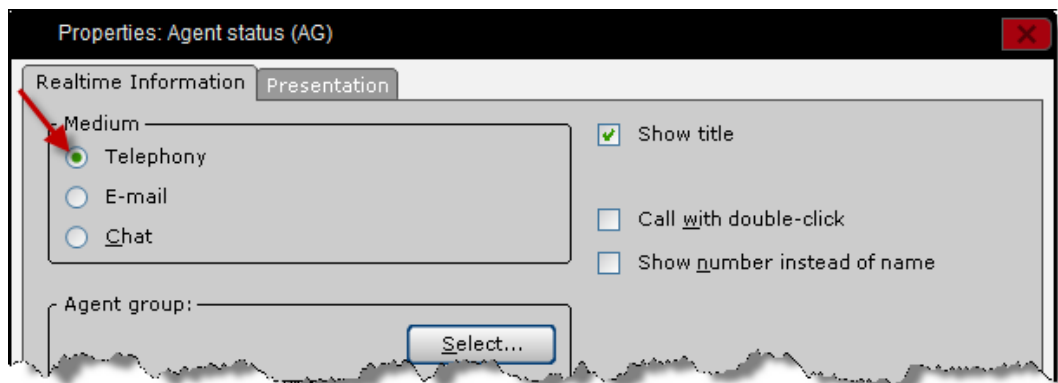


A. Click and drag.

3. The **Properties** dialogue box is displayed.

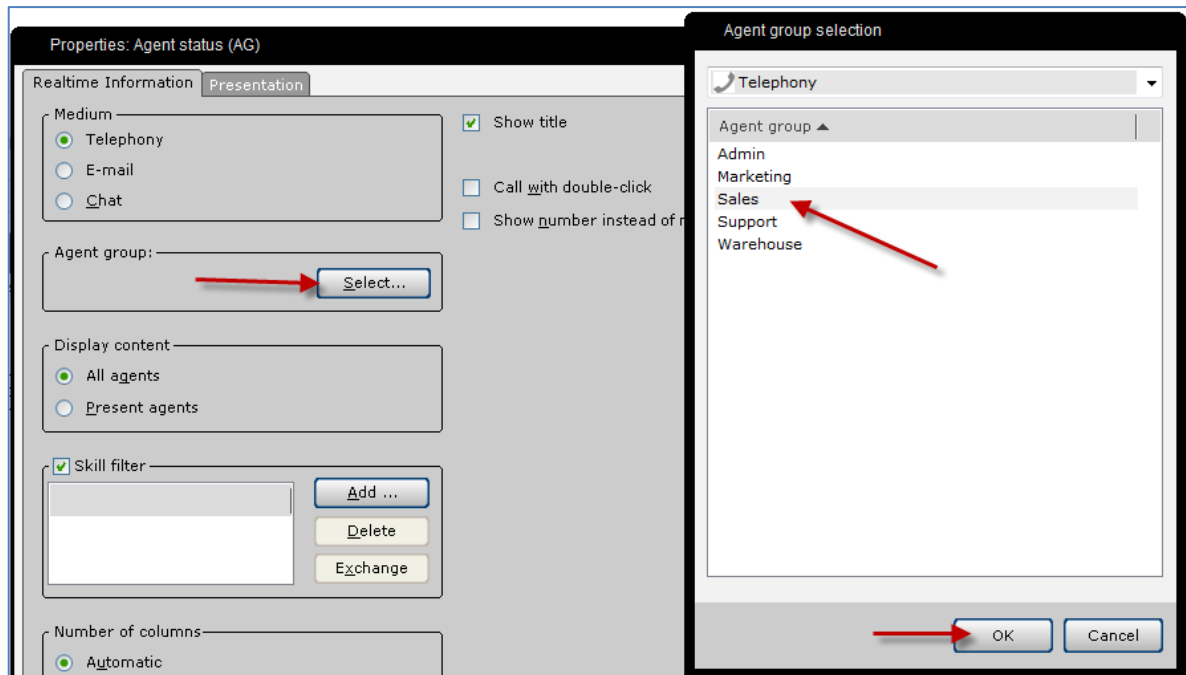


4. In this example, Telephony information is to be displayed. Therefore ensure that the **Telephony** radio button is selected.

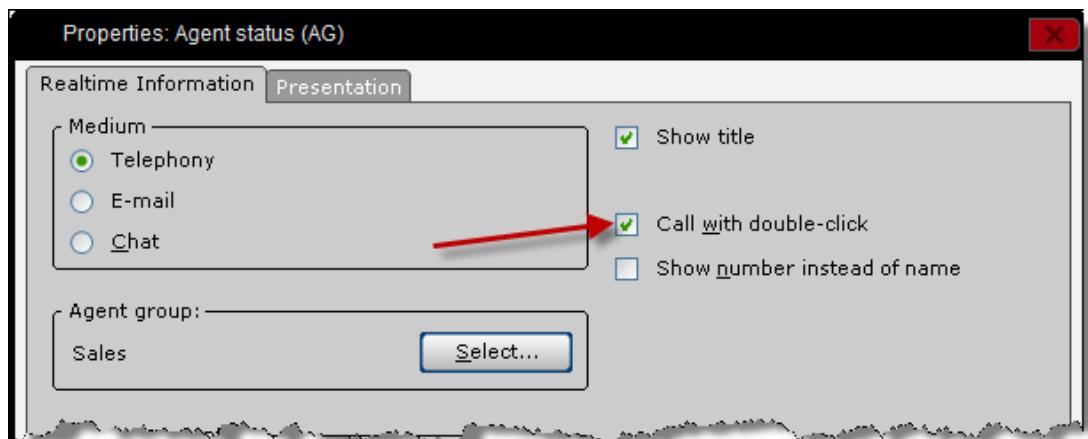


5. Click the **Select** button. Select the required Agent Group then click the **OK** button.

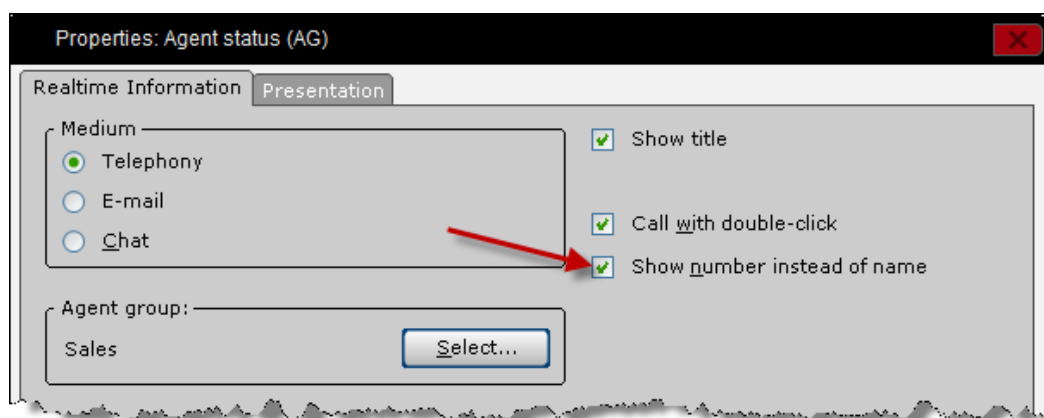




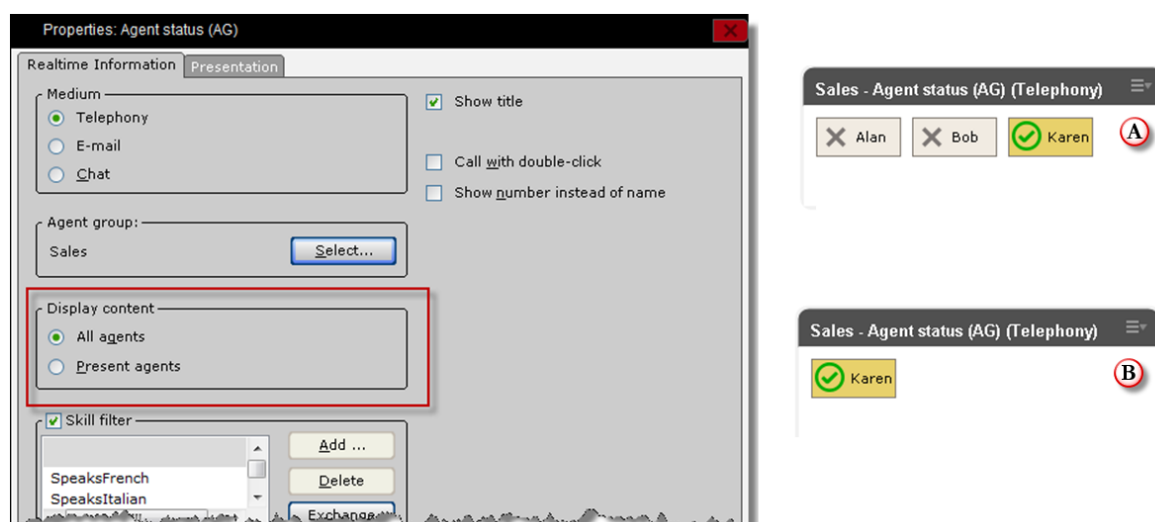
6. The agents within the group can be called by double clicking on their associated element. To activate this feature, select the **Call with double click** check box.



7. If required, the element can also be configured to display the associated number rather than agent's name. To activate this feature, click the **Show number instead of name** check box.



8. By selecting either the **All agents** or **Present agents** radio button, you can determine whether all agents assigned to the group are displayed or only agents that are currently signed on are displayed.



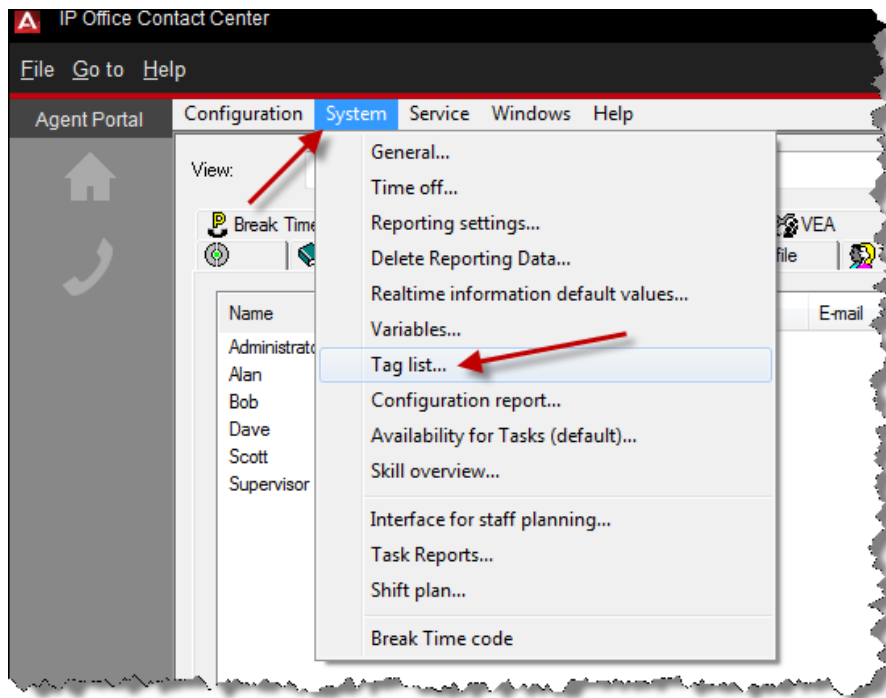
- A. All agents  
B. Present Agents (signed on)

Skills can be assigned against an agent. For example, you may wish to add skills for an agent relating to their capability to speak a particularly language.

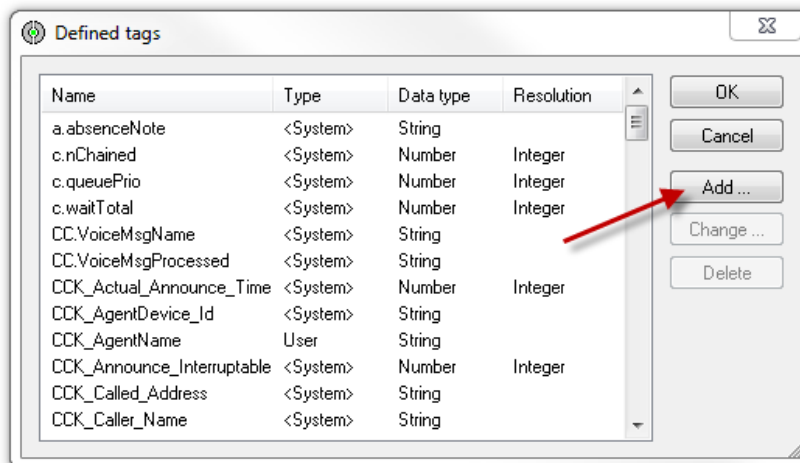
### Creating and Assigning Skills

Before skills can be assigned to an agent or group they must first be created.

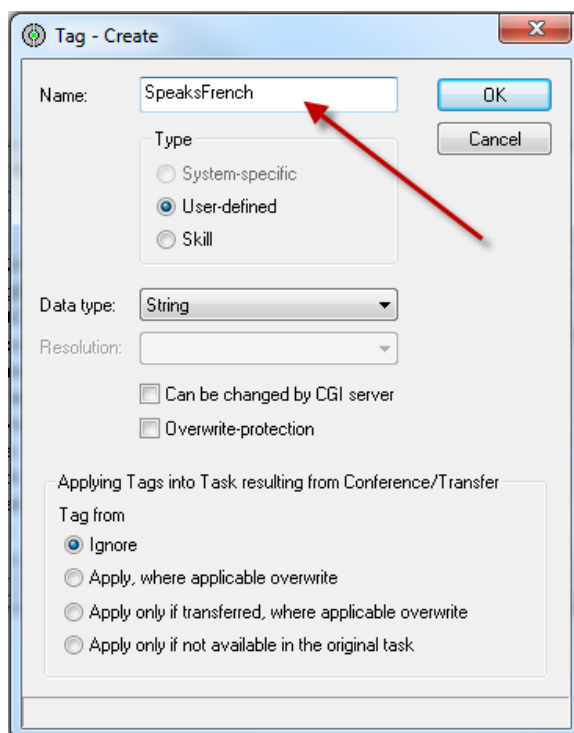
9. Save the existing configuration, then navigate to the **Configuration** view.
10. Select **System**, followed by **Tag list**.



11. Click the **Add** button.



12. In the **Name** field, enter a name to identify this skill.



**Tag - Create**

Name:

Type:

- ☐ System-specific
- ☒ User-defined
- ☐ Skill

Data type:

Resolution:

☐ Can be changed by CGI server

☐ Overwrite-protection

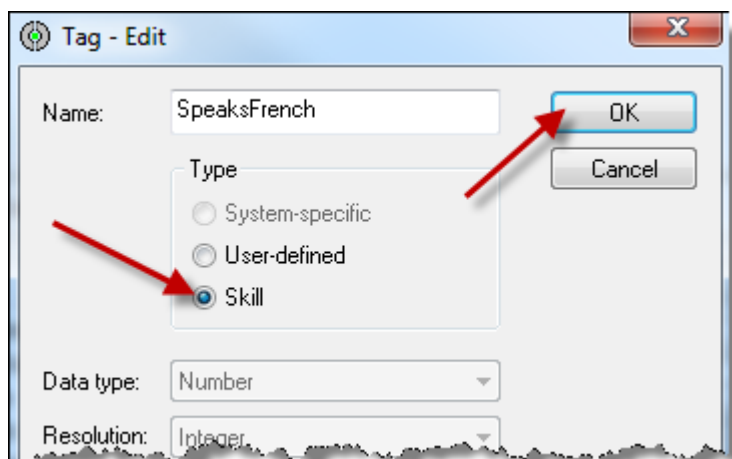
Applying Tags into Task resulting from Conference/Transfer

Tag from

- ☒ Ignore
- ☐ Apply, where applicable overwrite
- ☐ Apply only if transferred, where applicable overwrite
- ☐ Apply only if not available in the original task

OK Cancel

13. Click the **Skill** radio button, followed by the **OK** button.



**Tag - Edit**

Name:

Type:

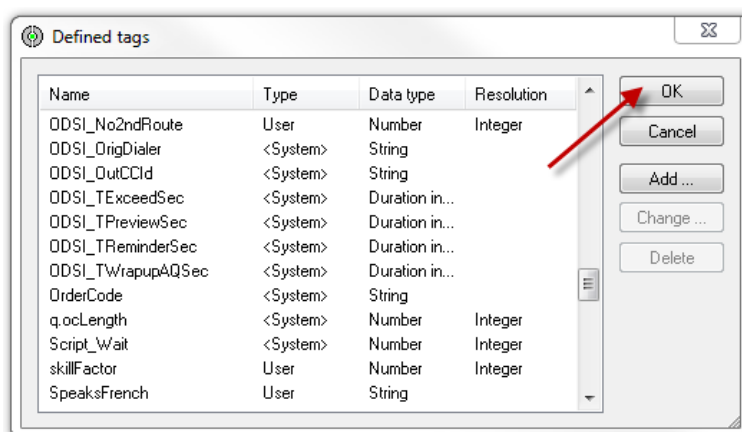
- ☐ System-specific
- ☐ User-defined
- ☒ Skill

Data type:

Resolution:

OK Cancel

14. Click the **OK** button.



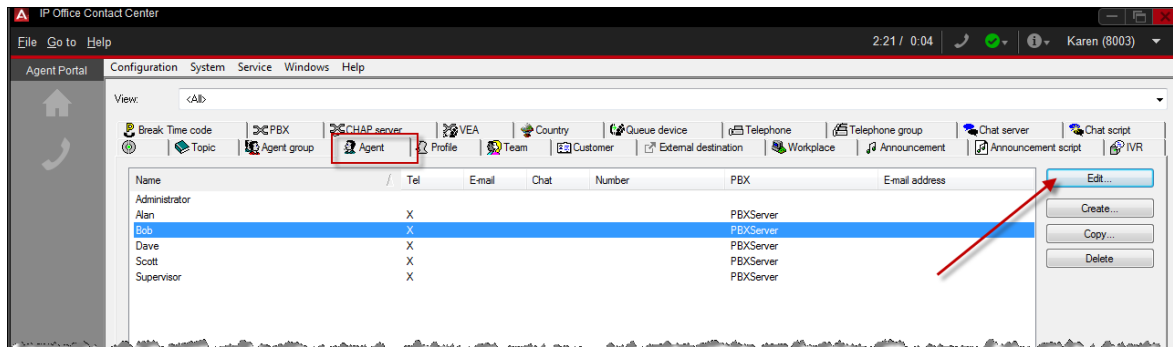
**Defined tags**

Name	Type	Data type	Resolution
ODSI_No2ndRoute	User	Number	Integer
ODSI_OrigDialer	<System>	String	
ODSI_OutCCId	<System>	String	
ODSI_TExceedSec	<System>	Duration in...	
ODSI_TPreviewSec	<System>	Duration in...	
ODSI_TReminderSec	<System>	Duration in...	
ODSI_TWrapupAQSec	<System>	Duration in...	
OrderCode	<System>	String	
q.ocLength	<System>	Number	Integer
Script_Wait	<System>	Number	Integer
skillFactor	User	Number	Integer
SpeaksFrench	User	String	

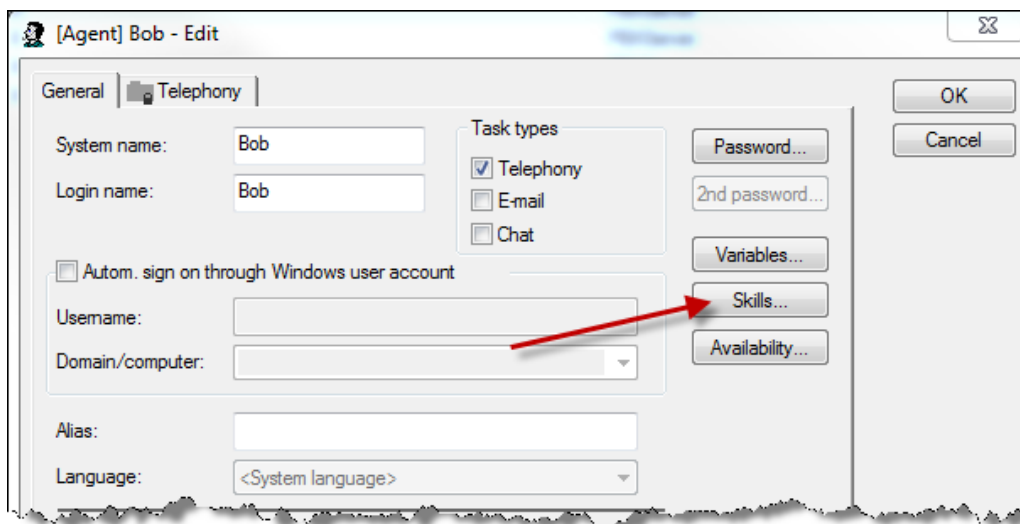
OK Cancel Add ... Change ... Delete

15. Repeat this process to add additional skills.

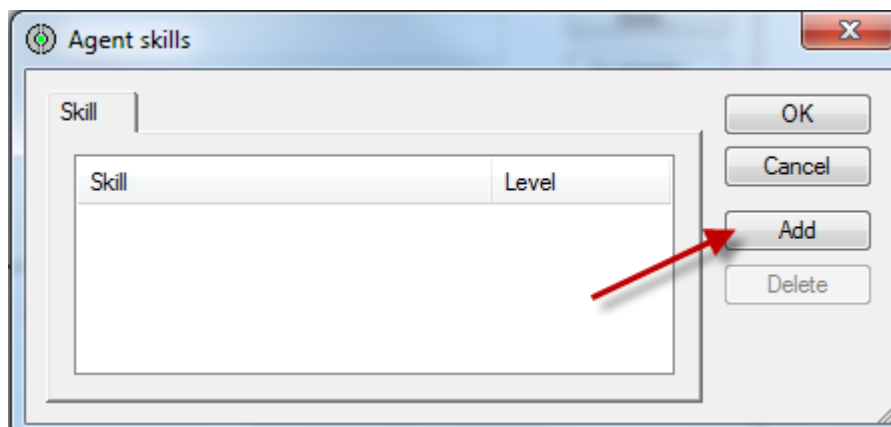
16. Navigate to the **Agents** tab. Select the Agent who is to be assigned the skill then click the **Edit** button.



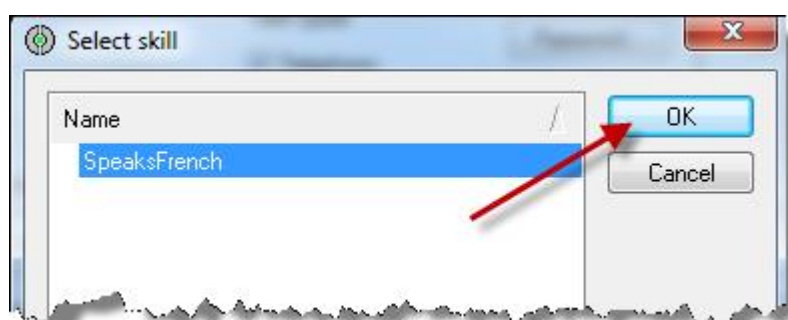
17. Select the **Skills** button.



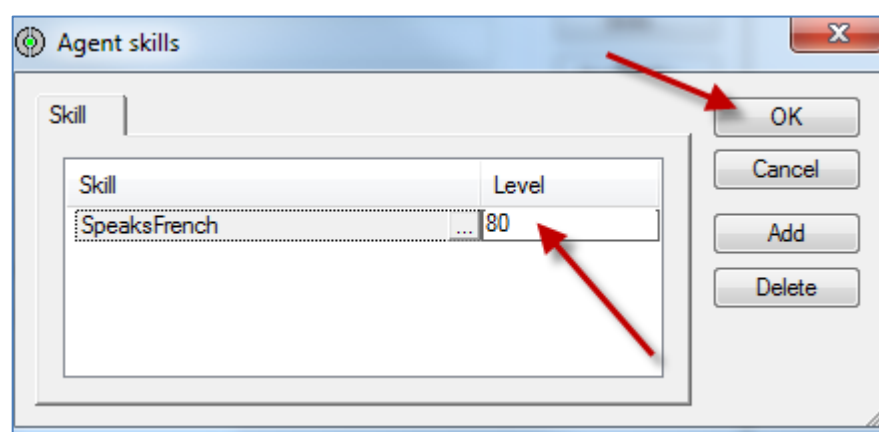
18. Click the **Add** button.



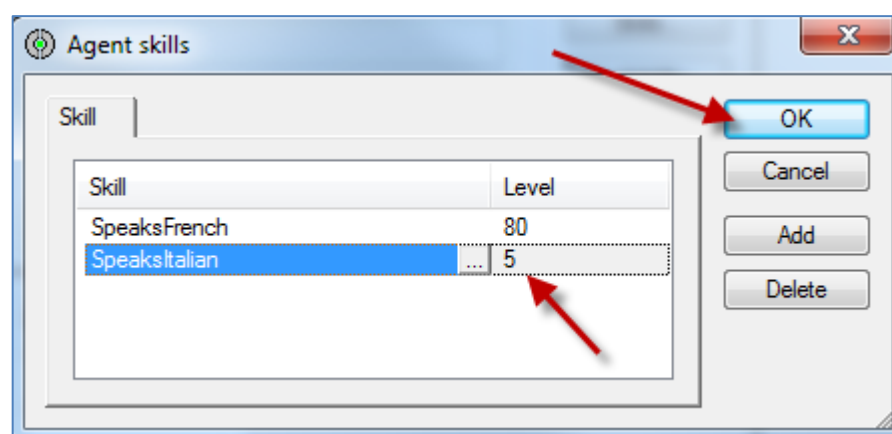
19. Select the previously configured skill. Then click the **OK** button.



20. The Agent Skills dialogue box is displayed. A skill level can be assigned to the agent to define their particular competence. To assign a skill, click on the **Level** field and enter a number between 1 and 100. (This figure is a percentage). Click the **OK** button.



21. Repeat the process to assign additional skills to the agent.



22. Click the **OK** button.

[Agent] Bob - Edit

General | **Telephony**

System name: Bob

Login name: Bob

☐ Autom. sign on through Windows user account

Username:

Domain/computer:

Alias:

Language: <System language>

Last name: Bob

First name:

Employee ID:

Cost center:

Predefined profile: <None> ...

Address book: Standard

Task types

☒ Telephony

☐ E-mail

☐ Chat

Password...

2nd password...

Variables...

Skills...

Availability...

Privileges...

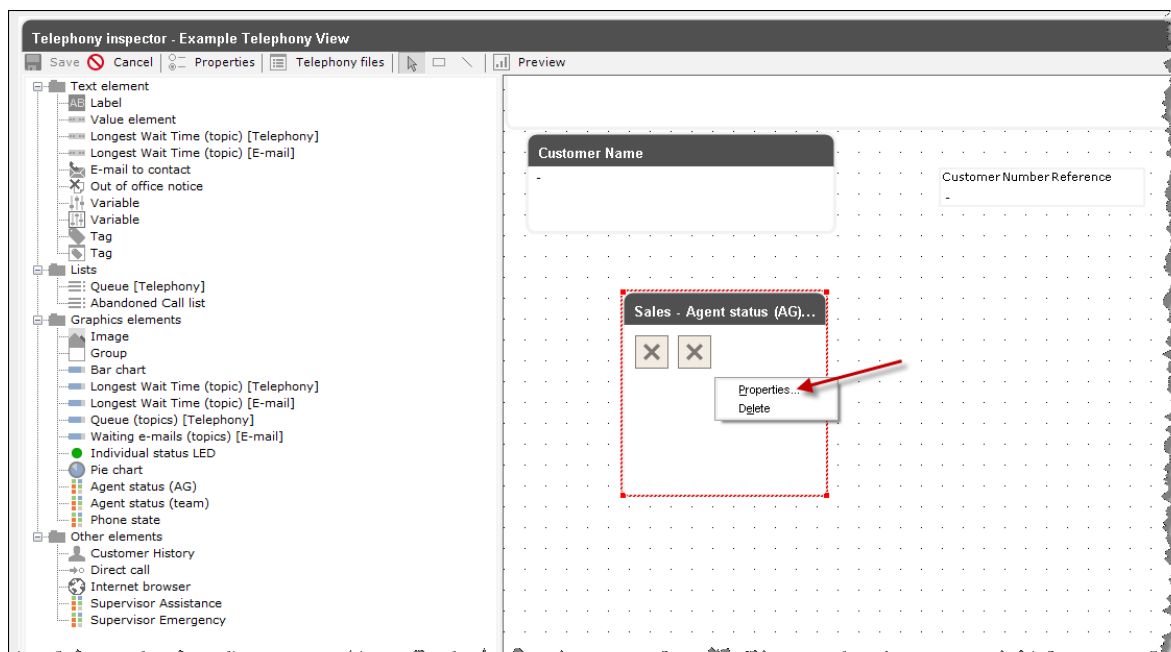
Authorization...

OK

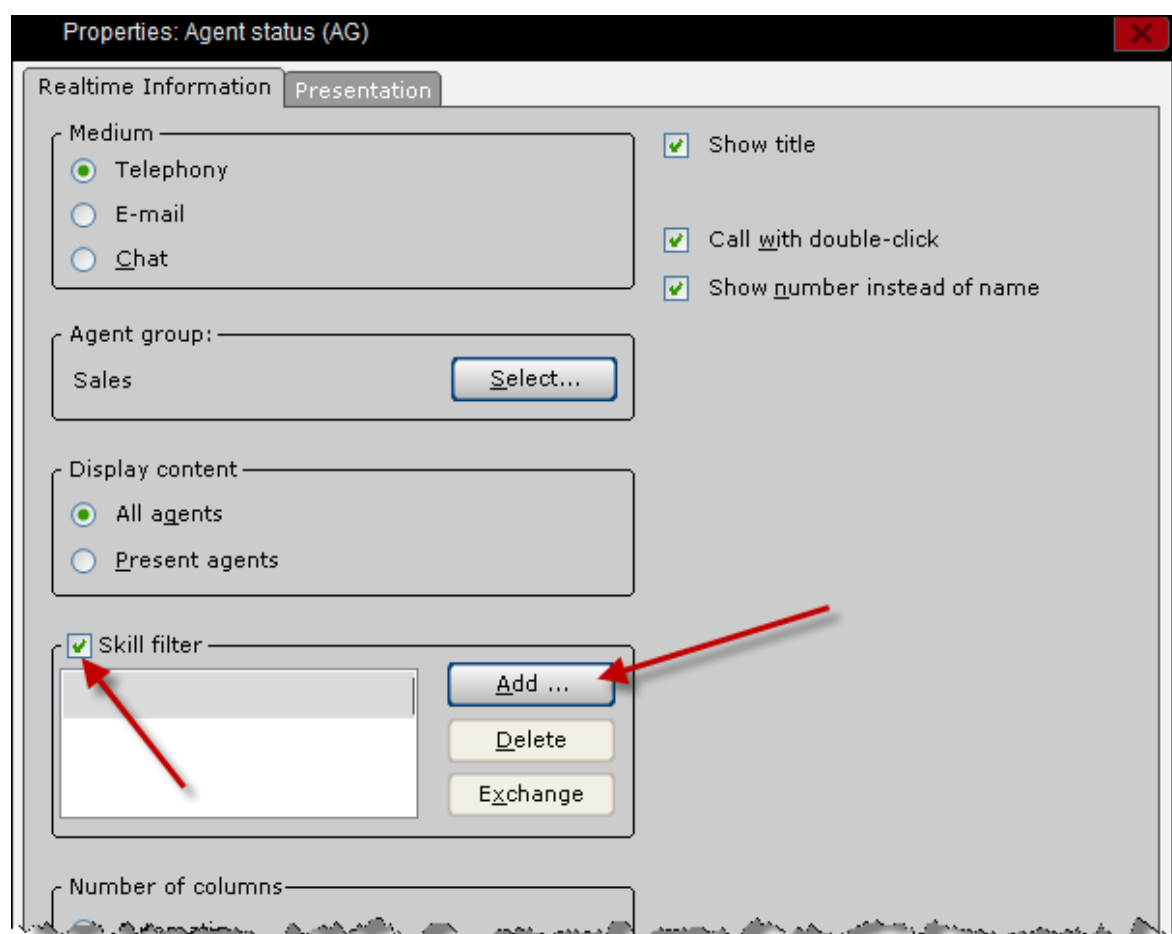
Cancel

23. Repeat this process to assign skills to other agents as required.

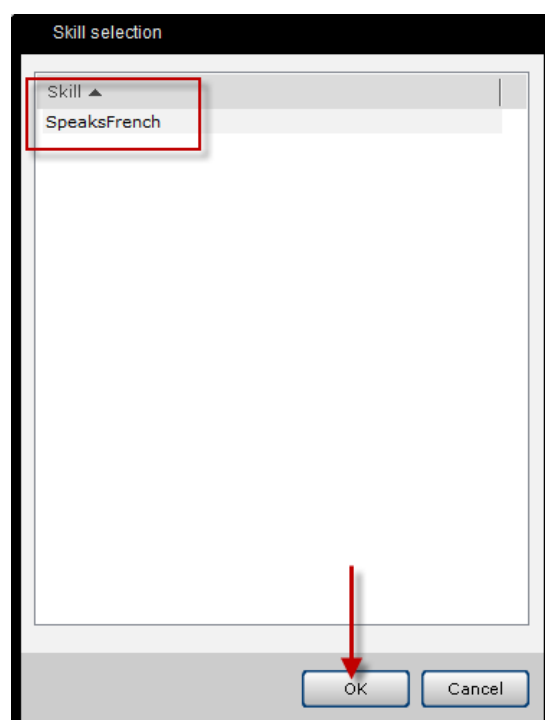
24. The **Agent Status** element can now be edited and the skill selected. Select the element that was previously placed on the Working Area. Right click and select **Properties**.



25. Select the **Skill filter** check box and click the **Add** button.

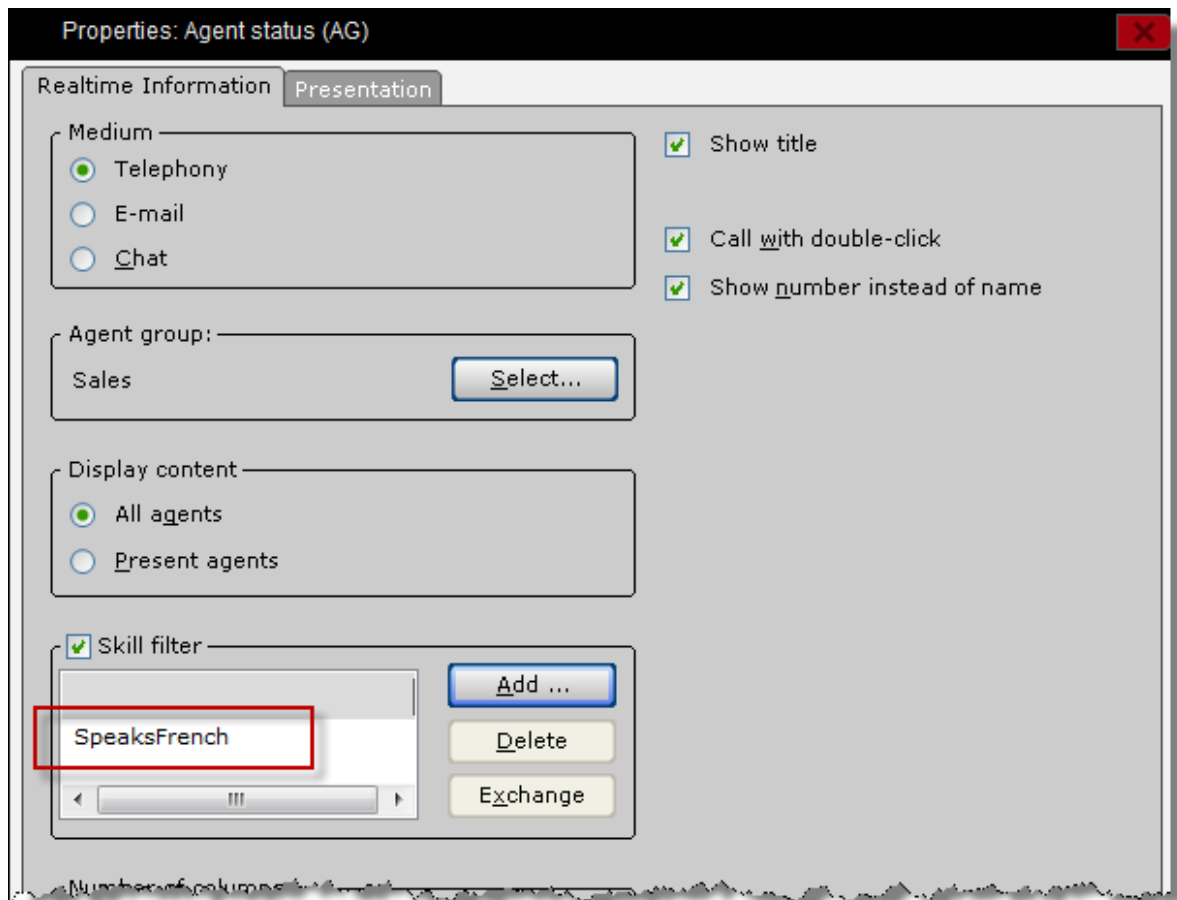


26. The previously configured **Skill** is displayed. Select the skill then click **OK**.



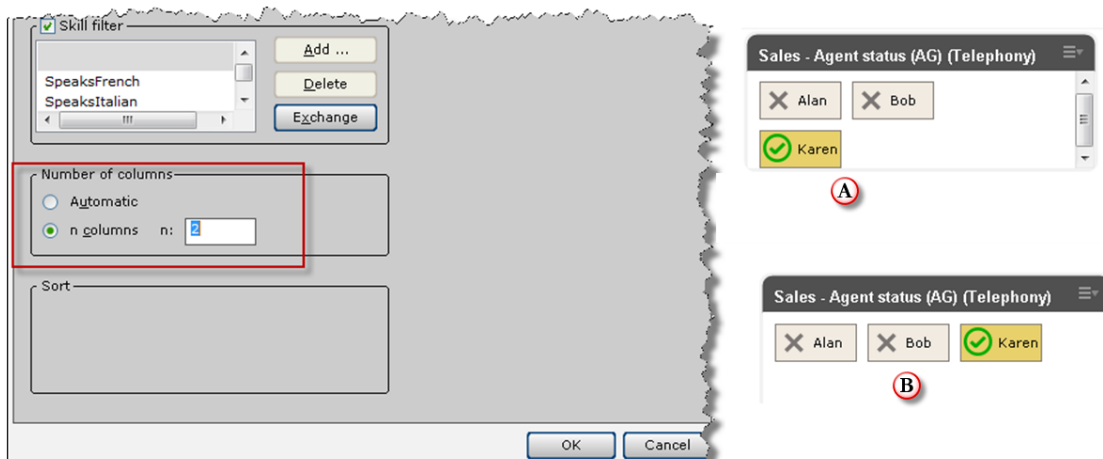


27. The assigned skill is displayed.



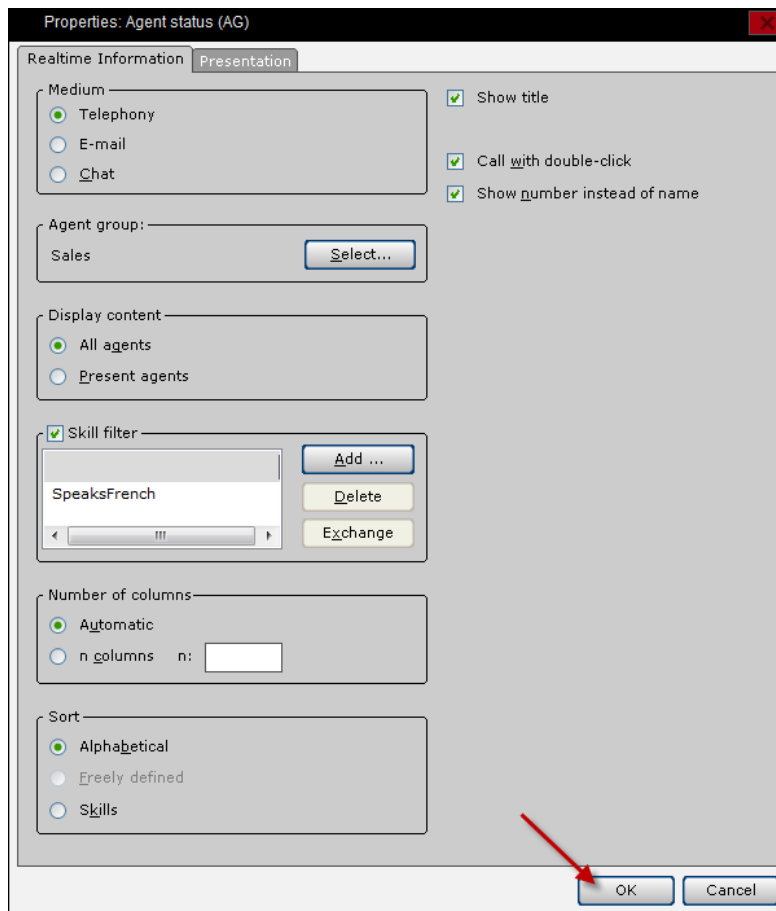
28. Click the **OK** button.

29. The number of columns on which the agents are displayed can also be defined.



- A. For example, defined as two columns
- B. Columns automatically assigned.

30. Click the **OK** button.



The image shows the 'Properties: Agent status (AG)' dialog box with the 'Presentation' tab selected. The 'Medium' section has 'Telephony' selected. The 'Agent group' is 'Sales'. The 'Display content' section has 'All agents' selected. The 'Skill filter' section has 'SpeaksFrench' in the list. The 'Number of columns' section has 'Automatic' selected. The 'Sort' section has 'Alphabetical' selected. The 'OK' button is highlighted with a red arrow.

**Properties: Agent status (AG)**

**Realtime Information** **Presentation**

**Medium**

- ☒ Telephony
- ☐ E-mail
- ☐ Chat

**Agent group:** Sales **Select...**

**Display content**

- ☒ All agents
- ☐ Present agents

☒ **Skill filter**

SpeaksFrench **Add ...** **Delete** **Exchange**

**Number of columns**

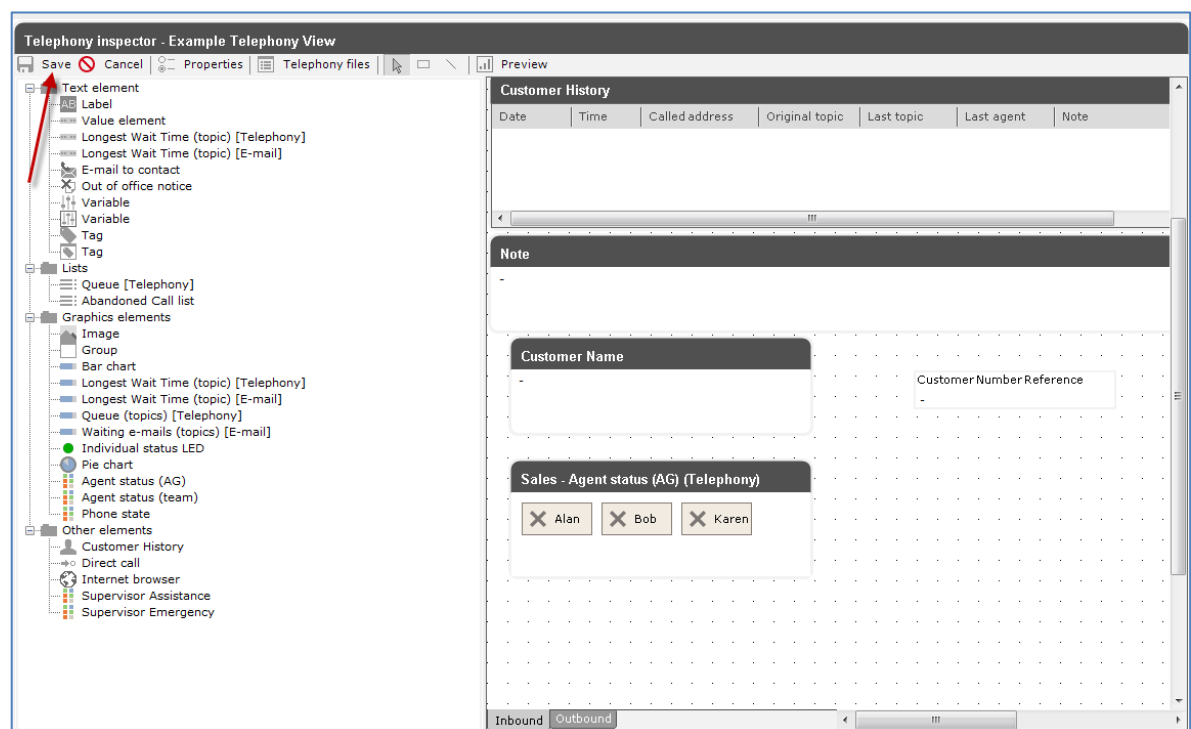
- ☒ Automatic
- ☐ n columns n:

**Sort**

- ☒ Alphabetical
- ☐ Freely defined
- ☐ Skills

**OK** **Cancel**

31. Click the **Save** button.



The image shows the 'Telephony inspector - Example Telephony View' window. The 'Save' button is highlighted with a red arrow. The window displays a tree view on the left and a preview area on the right. The preview area shows a 'Customer History' table, a 'Note' field, and a 'Sales - Agent status (AG) (Telephony)' section with buttons for Alan, Bob, and Karen.

**Telephony inspector - Example Telephony View**

**Save** **Cancel** **Properties** **Telephony files** **Preview**

**Text element**

- Label
- Value element
- Longest Wait Time (topic) [Telephony]
- Longest Wait Time (topic) [E-mail]
- E-mail to contact
- Out of office notice
- Variable
- Tag
- Tag

**Lists**

- Queue [Telephony]
- Abandoned Call list

**Graphics elements**

- Image
- Group
- Bar chart
- Longest Wait Time (topic) [Telephony]
- Longest Wait Time (topic) [E-mail]
- Queue (topics) [Telephony]
- Waiting e-mails (topics) [E-mail]
- Individual status LED
- Pie chart
- Agent status (AG)
- Agent status (team)
- Phone state

**Other elements**

- Customer History
- Direct call
- Internet browser
- Supervisor Assistance
- Supervisor Emergency

**Customer History**

Date	Time	Called address	Original topic	Last topic	Last agent	Note

**Note**

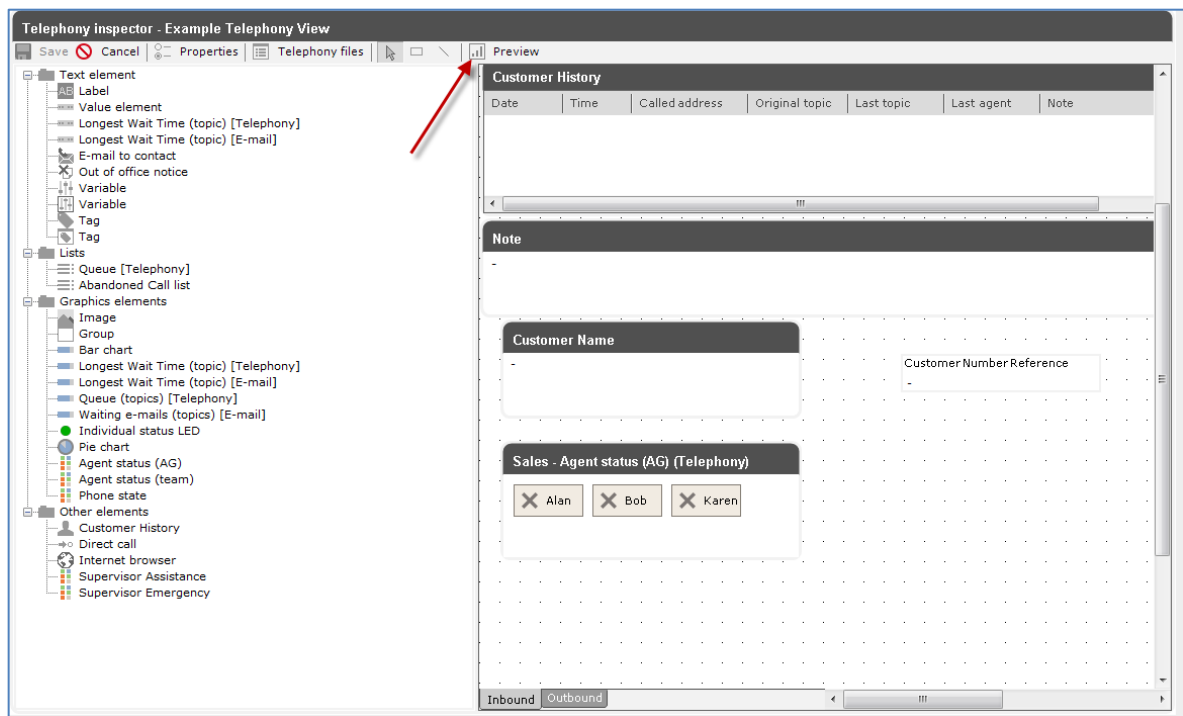
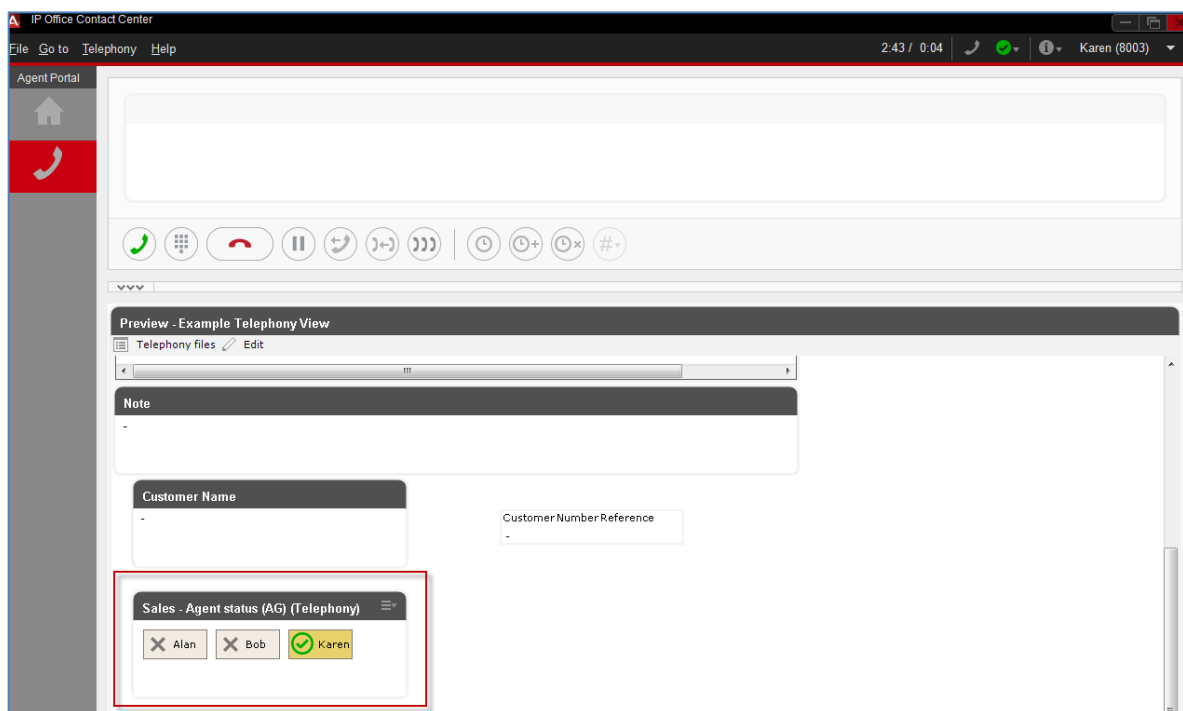
**Customer Name**

**Customer Number Reference**

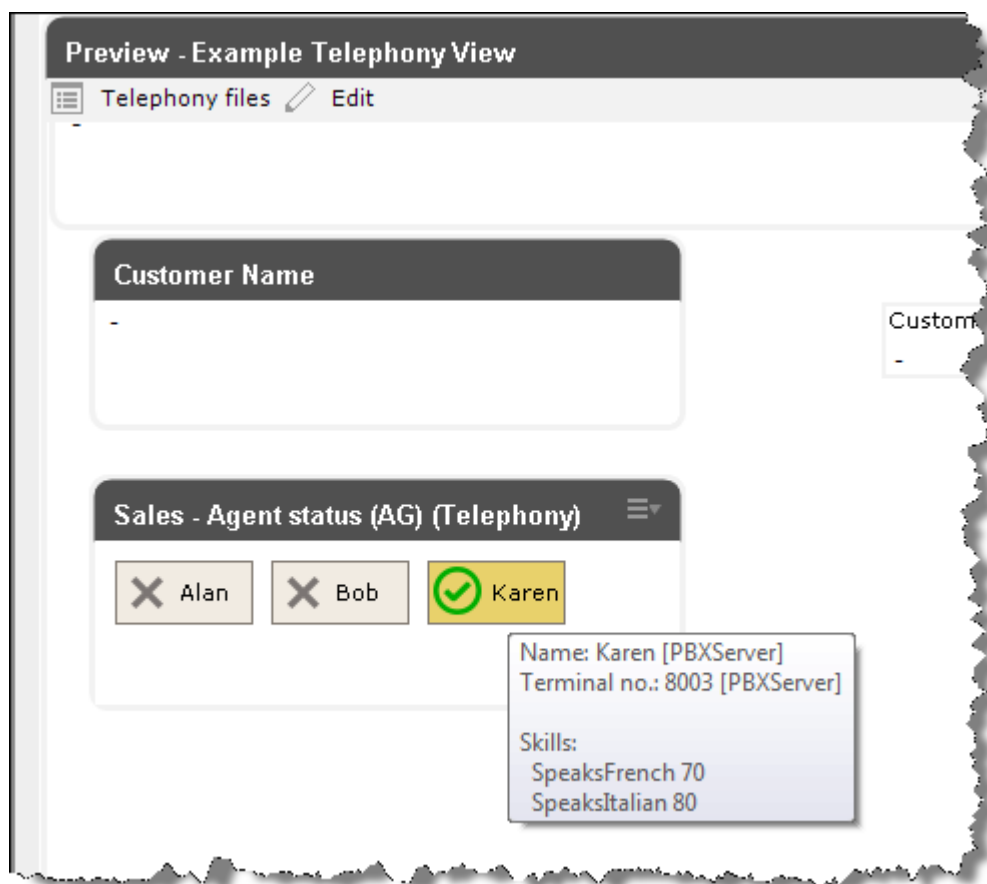
**Sales - Agent status (AG) (Telephony)**

**X Alan** **X Bob** **X Karen**

**Inbound** **Outbound**

32. Click the **Preview** button.33. The **Agent Status (AG)** element is displayed.

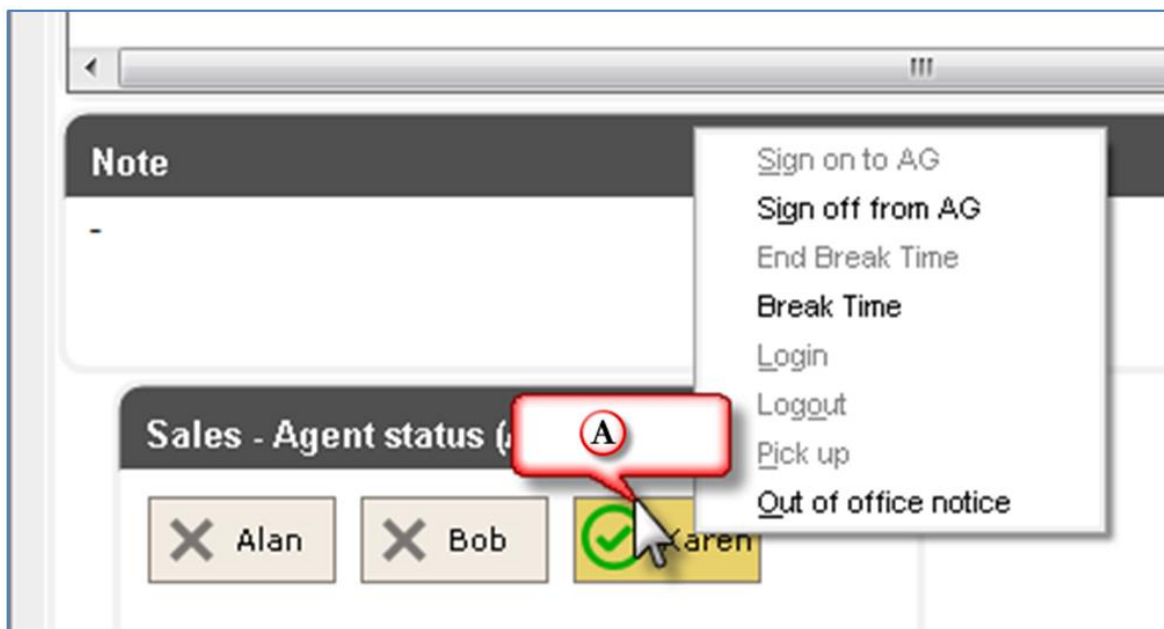
34. To view further details relating to the Agent's status, hover the mouse over the agent's icon. In this example, Agent Karen is available on extension 8003 and has skills relating to speaking French 70 and Italian 80.



35. Click the expand icon to view additional status icons.

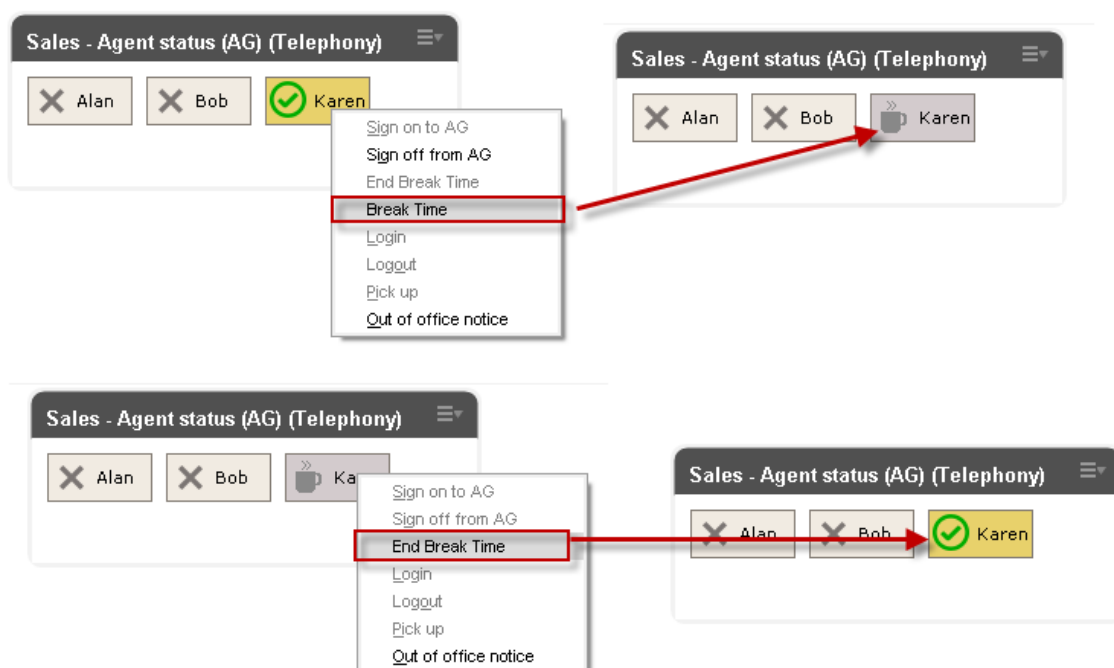


36. By right clicking adjacent to the required agent, further options available for selection are displayed.

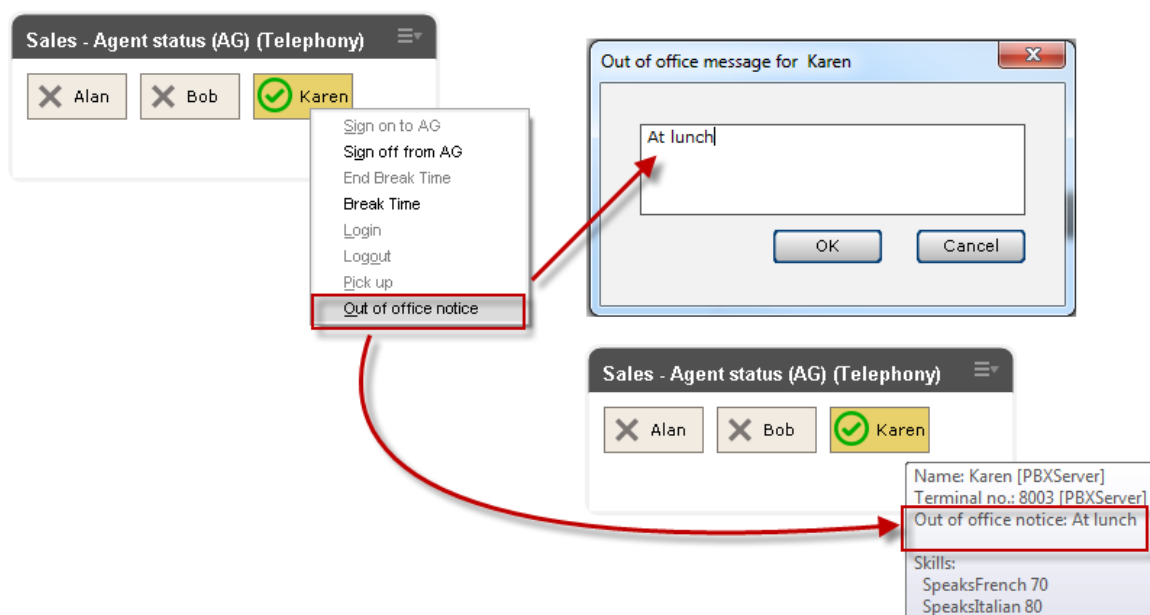


A. Right click.

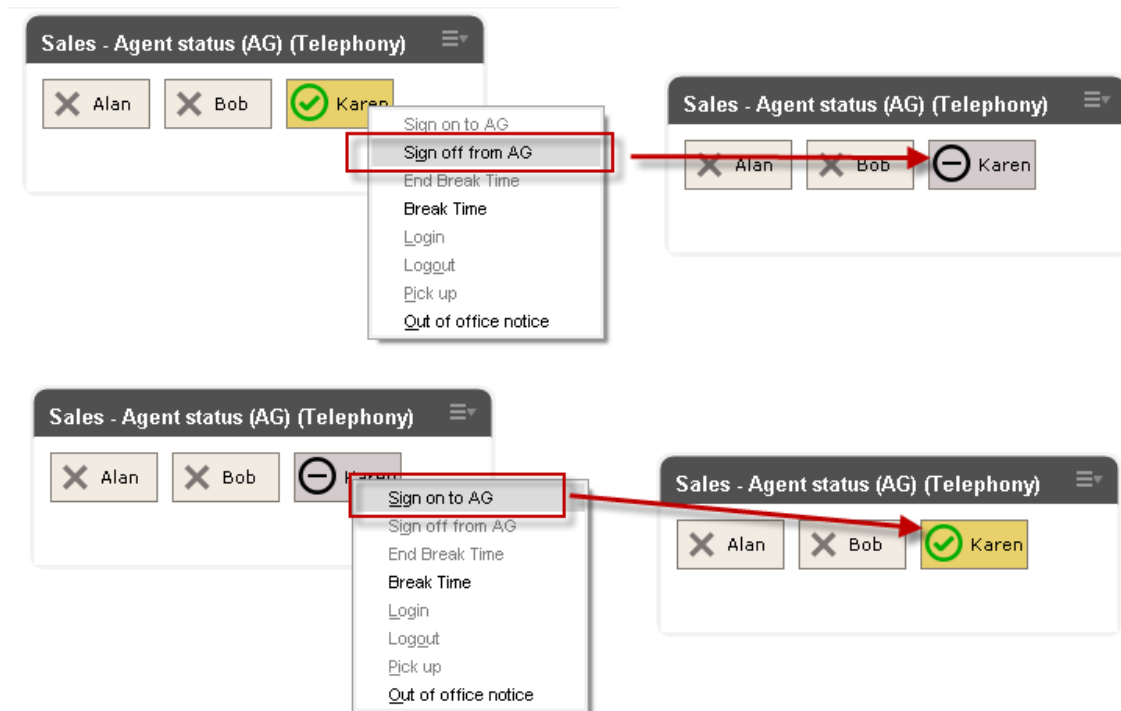
### 37. Agents can put themselves in and out of **Break Time**.



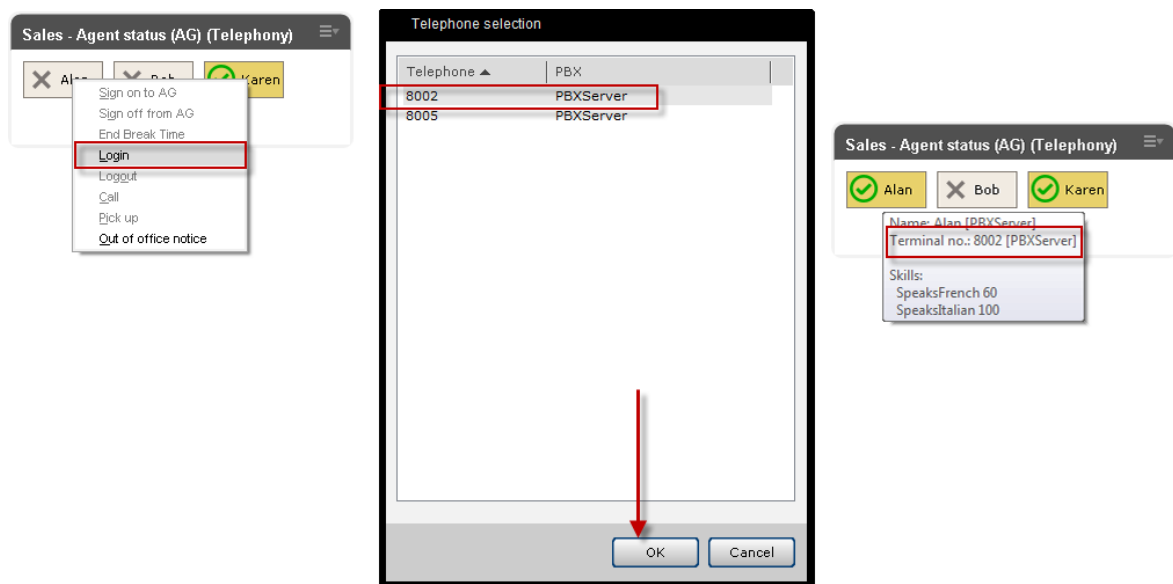
### 38. Agents can configure their **Out Of Office Notice**.



39. They can sign off and on to the agent group, to which they have been assigned.



40. When configured, agents can also right click on the icons of other agents and log them into / out of the agent group.

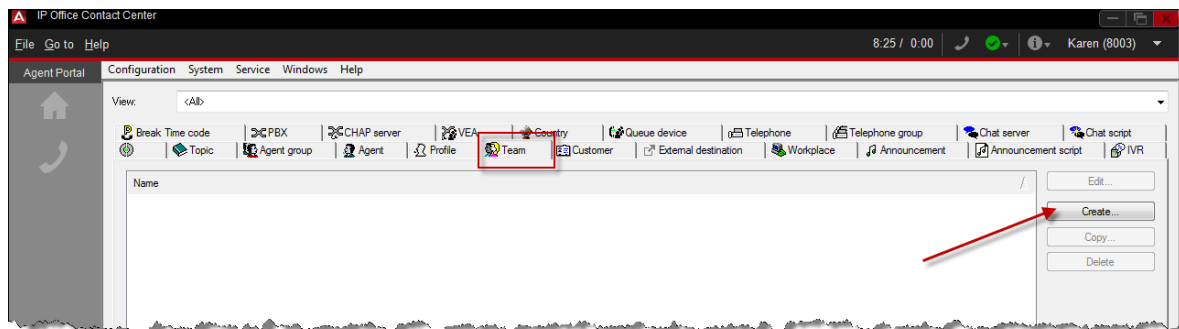


41. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

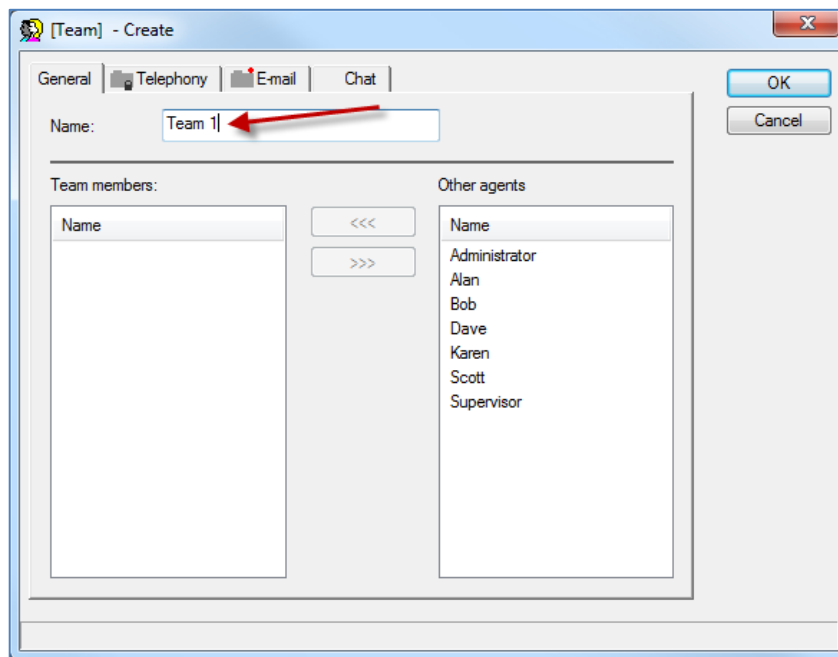
## Teams and Telephone Groups

These groups can also be created from the **Configuration** interface. Once configured, they can be utilized with **Agent Status (Team)** and **Phone State** elements.

42. To create a **Team**, from the configuration interface select the **Team** tab and click the **Create** button.

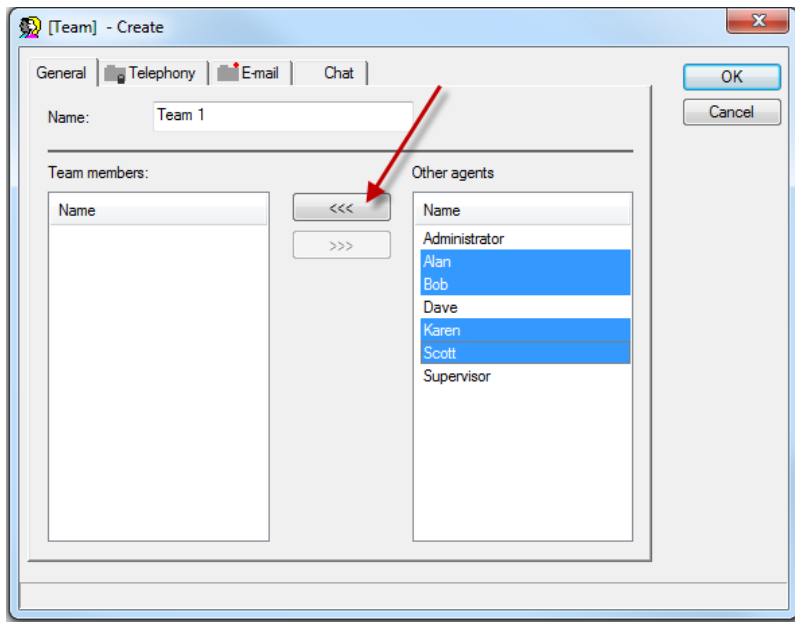


43. The **Create** dialogue box is displayed, enter a name for the **Team**.

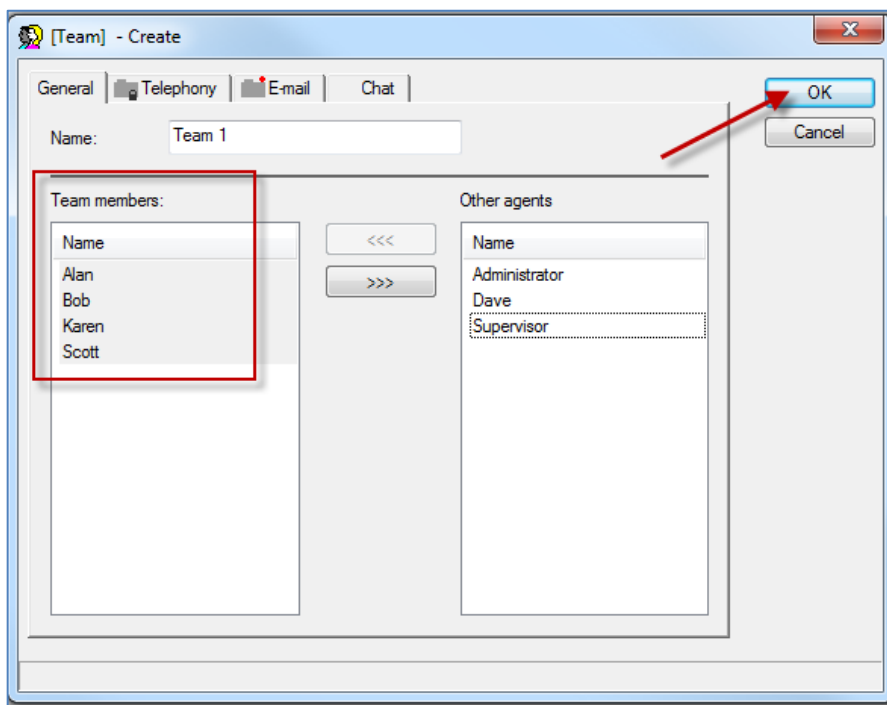


44. From the **Other agents** panel, select the agents to be assigned to the team. Multiple agents can be selected by holding down the **Ctrl** key and selecting each agent as required. Click on the left facing arrow button.

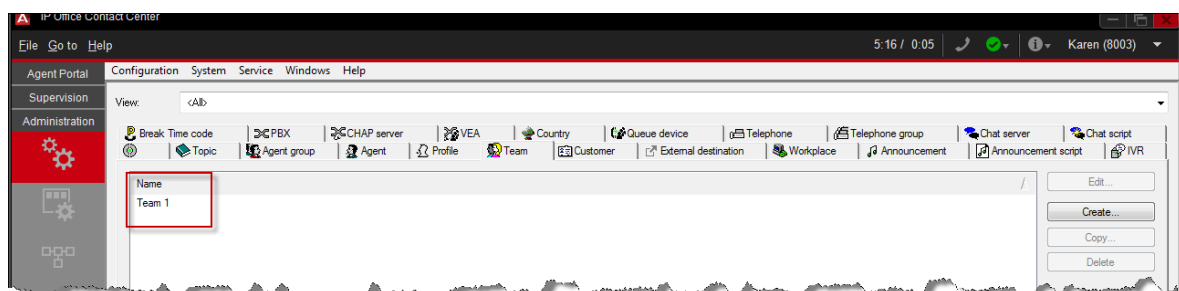




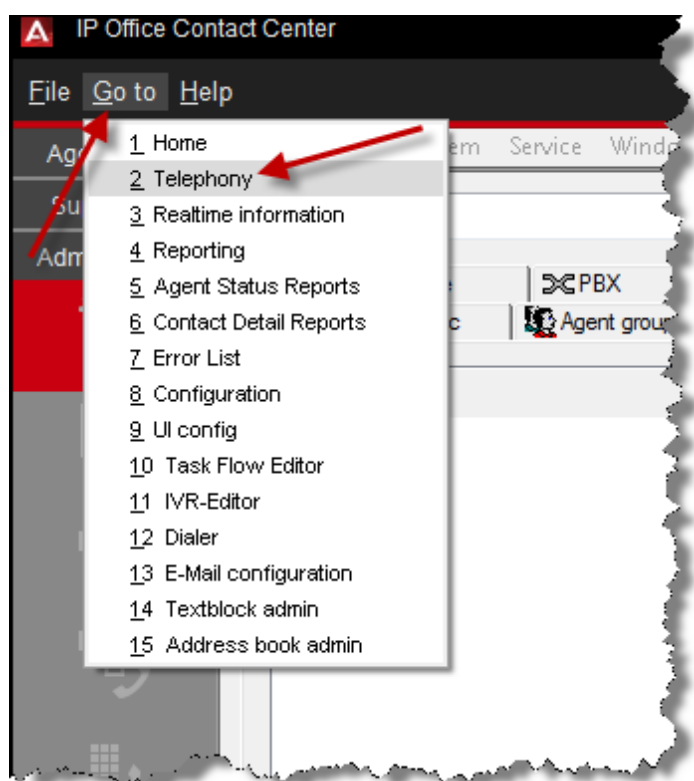
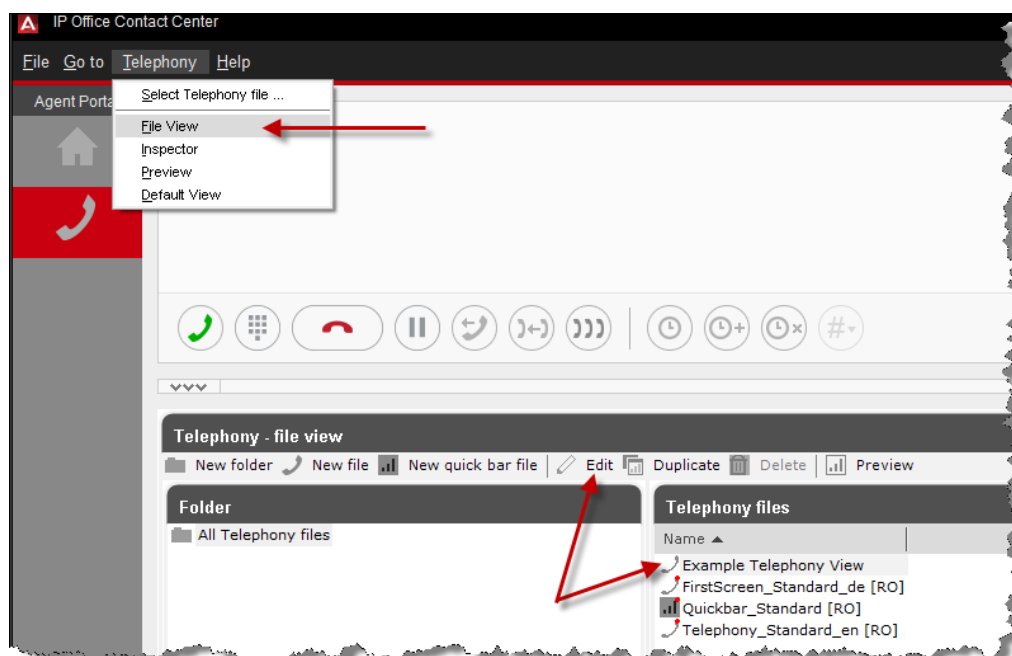
45. The agents are assigned as team members. Click the OK button.



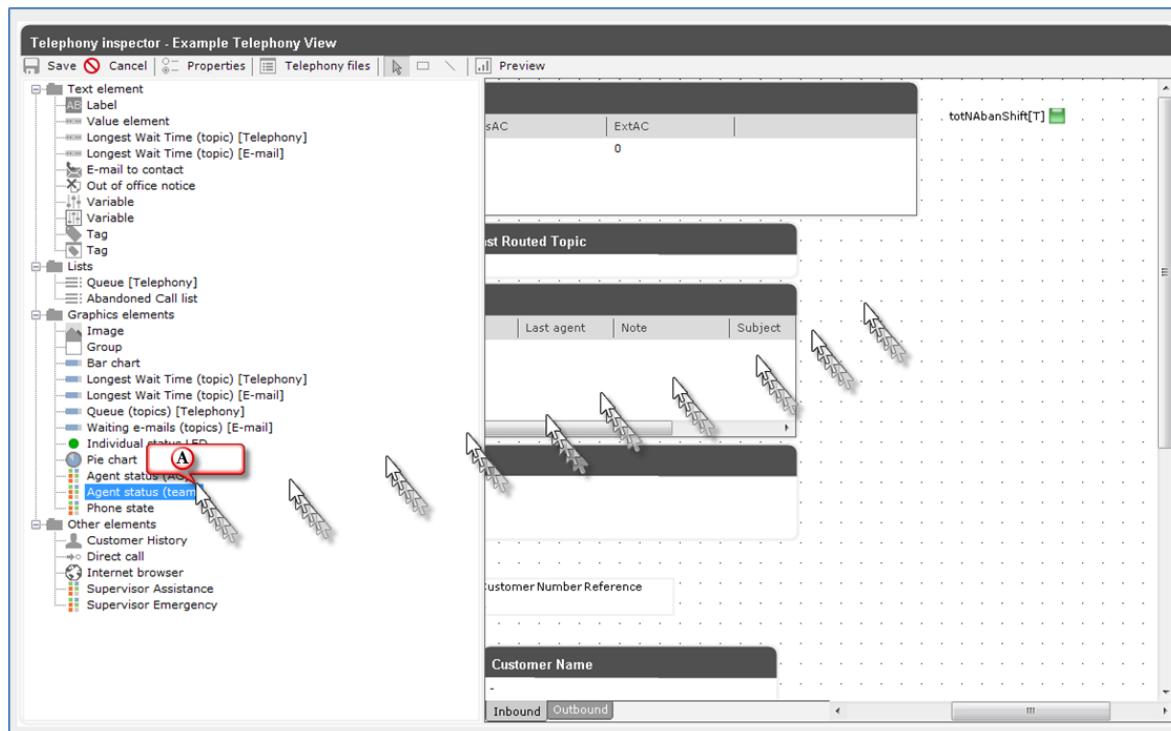
46. The configured **Team** is displayed.



## 47. Navigate to the Telephony View.

48. Select the duplicated file to be edited, and then click the **Edit** button.

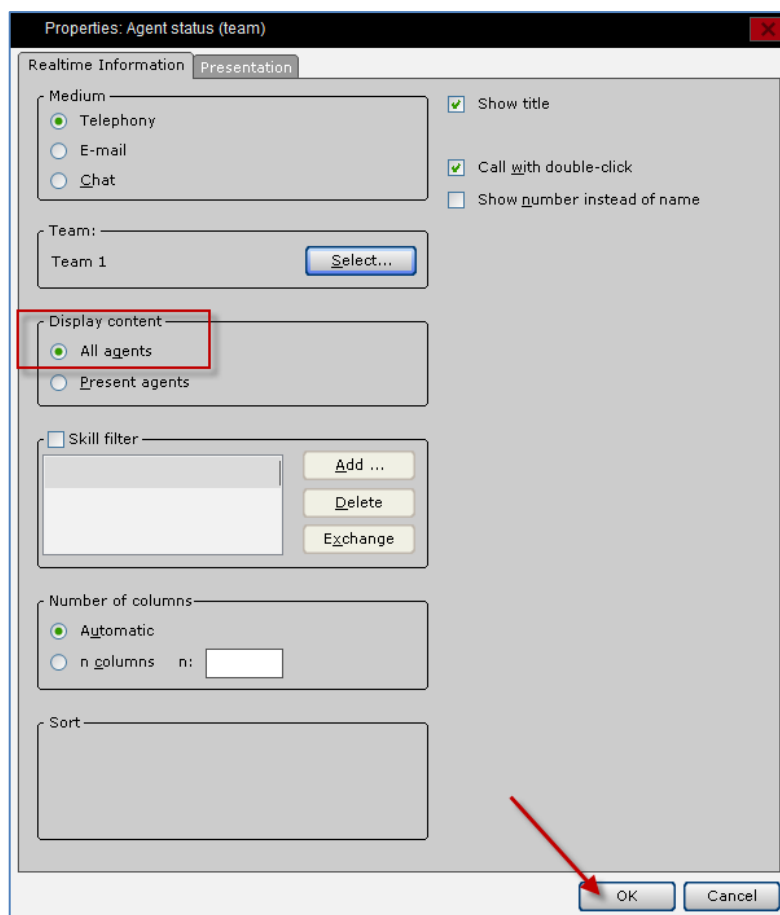
49. Click on the **Agent Status (Team)** element and drag it to the Working Area.



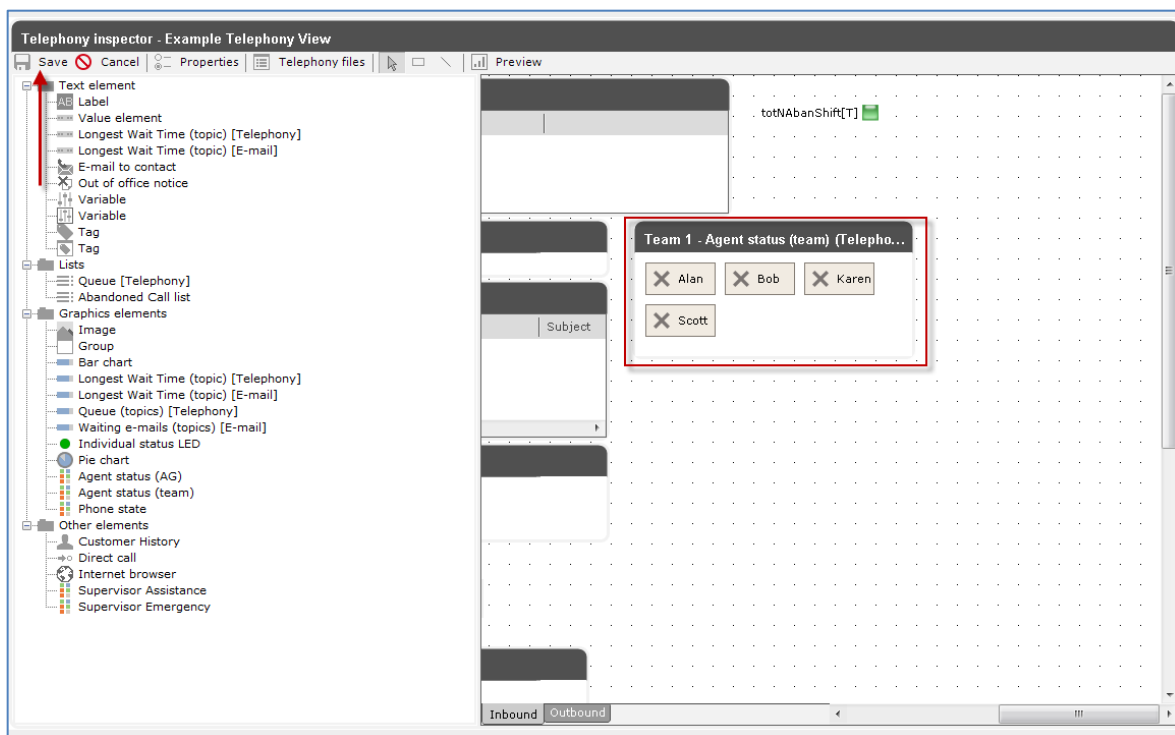
A. Click and drag.

50. The Properties dialogue box is displayed. The properties of the **Agent Status (Team)** element can be configured in a similar manner to the Agent Status (AG) element. Therefore please refer to the **Adding an Agent Status (AG) Element** of this guide for further details.

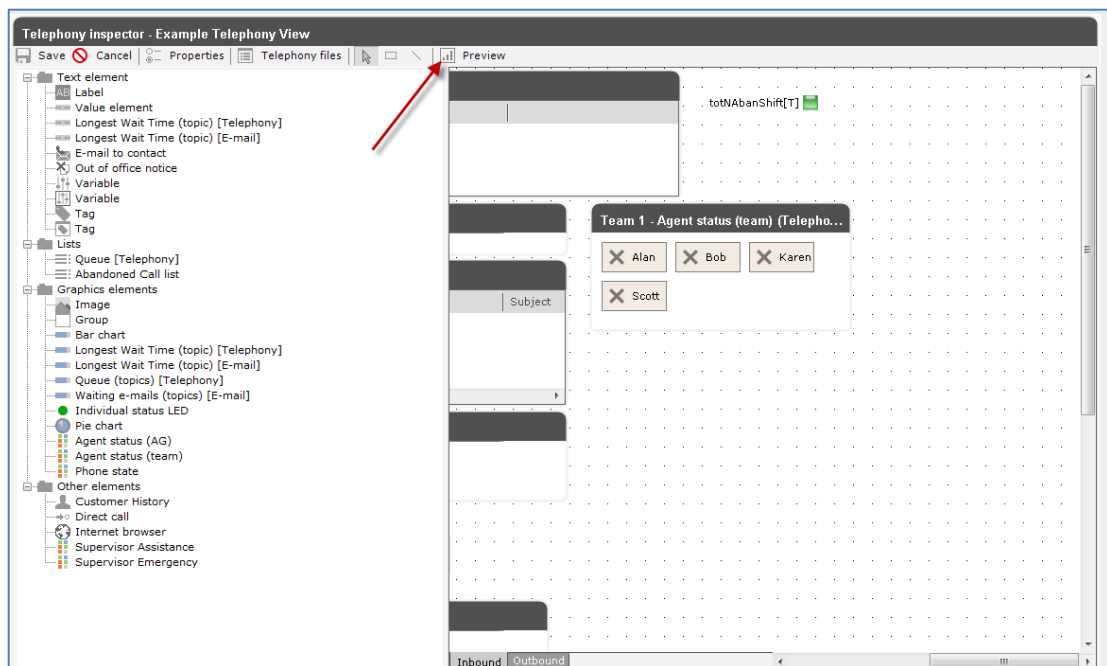
51. In this example, the previously configured Team 1 has been selected. Once all the required settings have been configured, click the **OK** button.



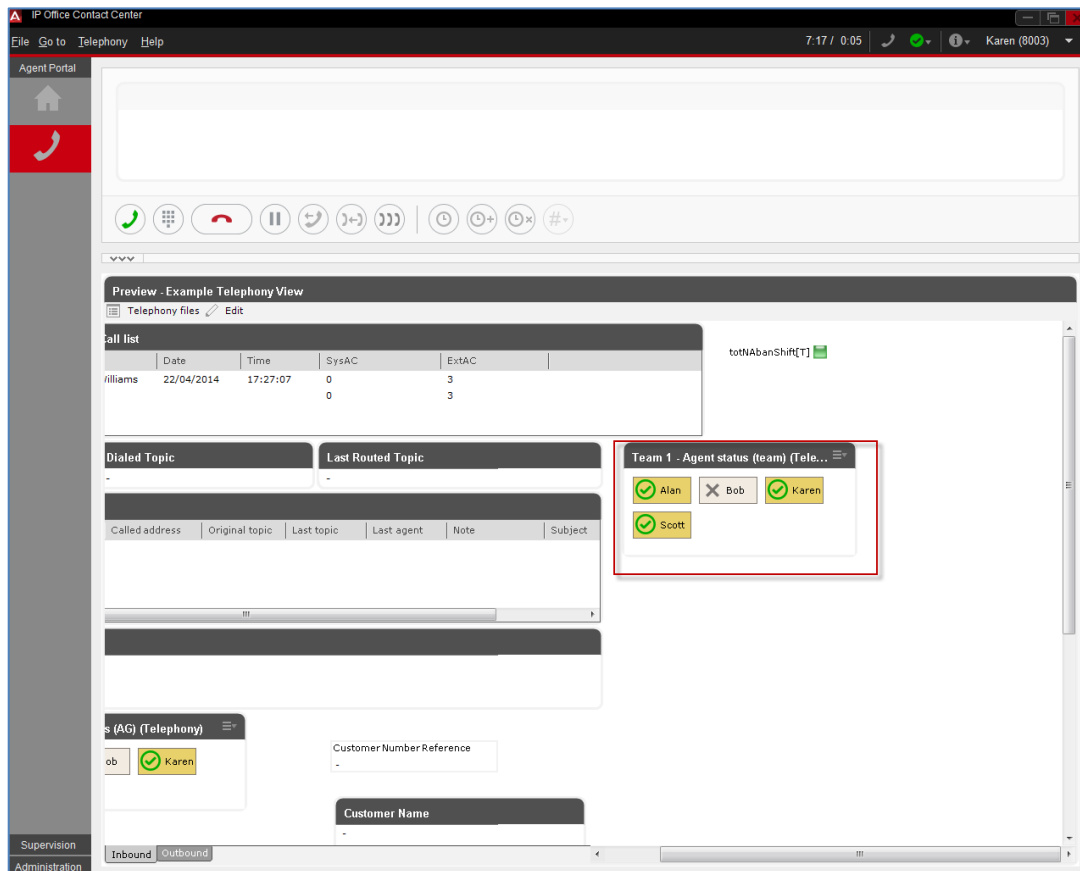
52. The configured Agent Status (team) element is displayed. Click the save button.



53. Then click the **Preview** button.



54. The configured element is displayed.

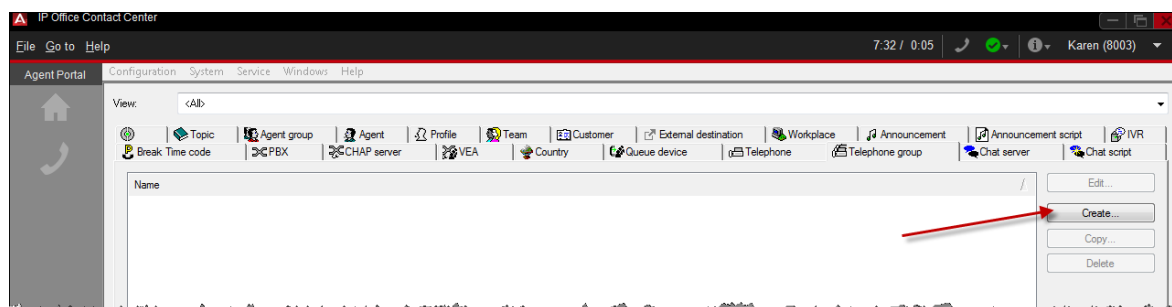


55. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

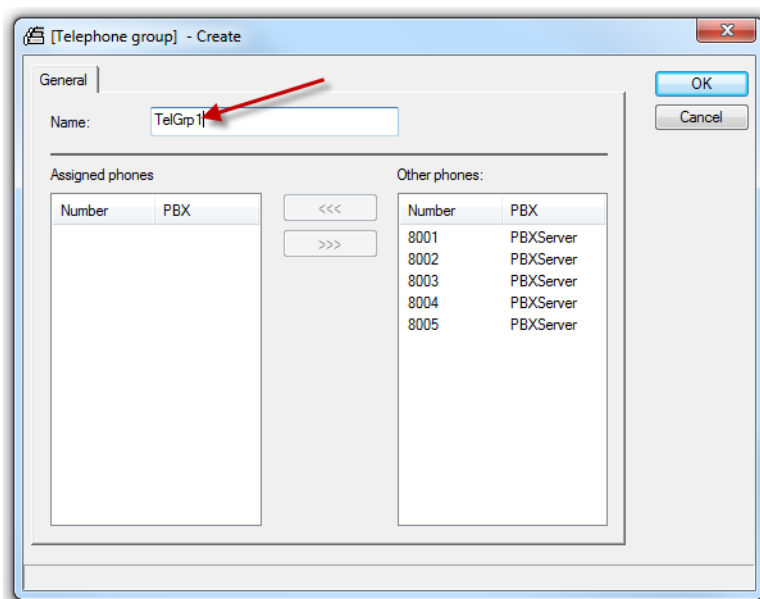
## Adding a Phone State Element to the Telephony View

The status of Telephones used with IP Office Contact Center can be viewed. Telephone status information such as whether the Telephone is out of service, whether it is being used for an internal or external call without an agent being logged in, can be viewed by creating a **Telephone Group** and then assigning the group to a **Phone State** element.

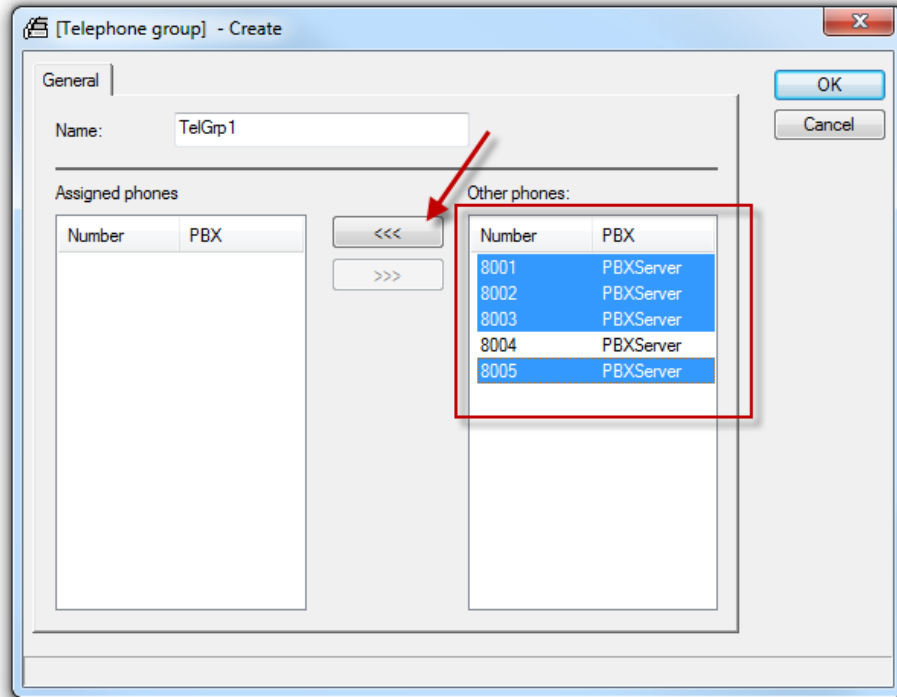
56. To create a Telephone Group, from the configuration interface select the **Telephone group** tab and click the **Create** button.



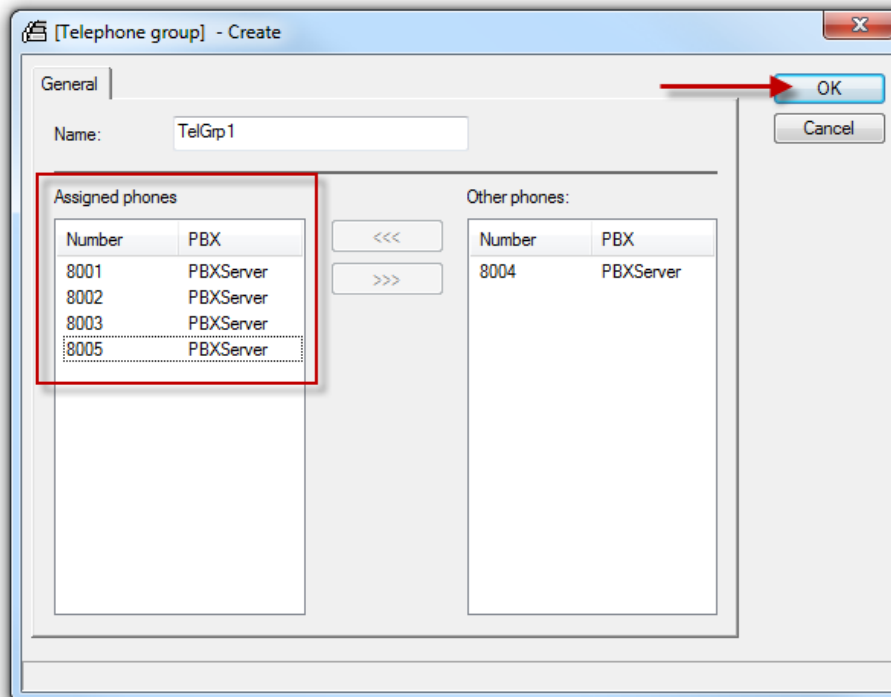
57. The **Create** page is displayed, enter a name for the Telephone Group.



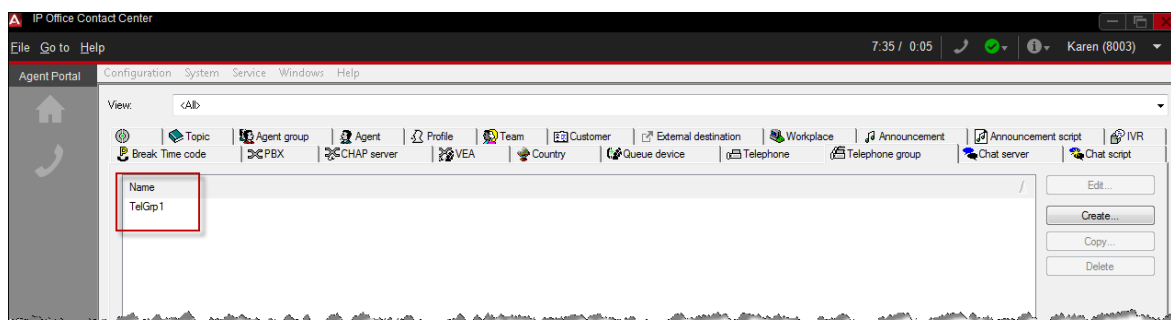
41. From the **Other phones** panel, select the phones to be assigned to the team. Multiple phones can be selected by holding down the **Ctrl** key and selecting each phone as required. Click on the left facing arrow button.



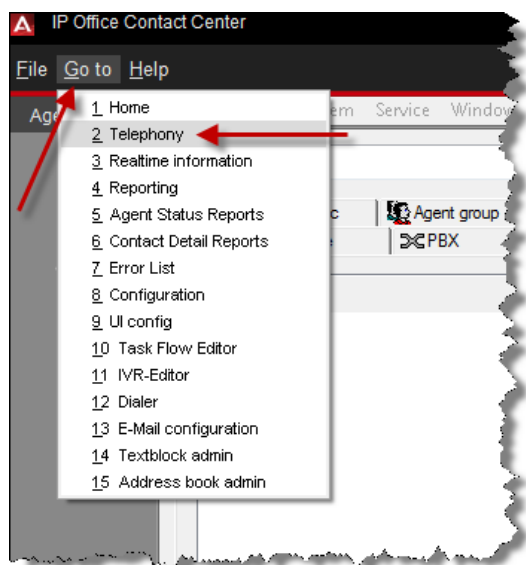
42. The phones are assigned as team members. Click the **OK** button.



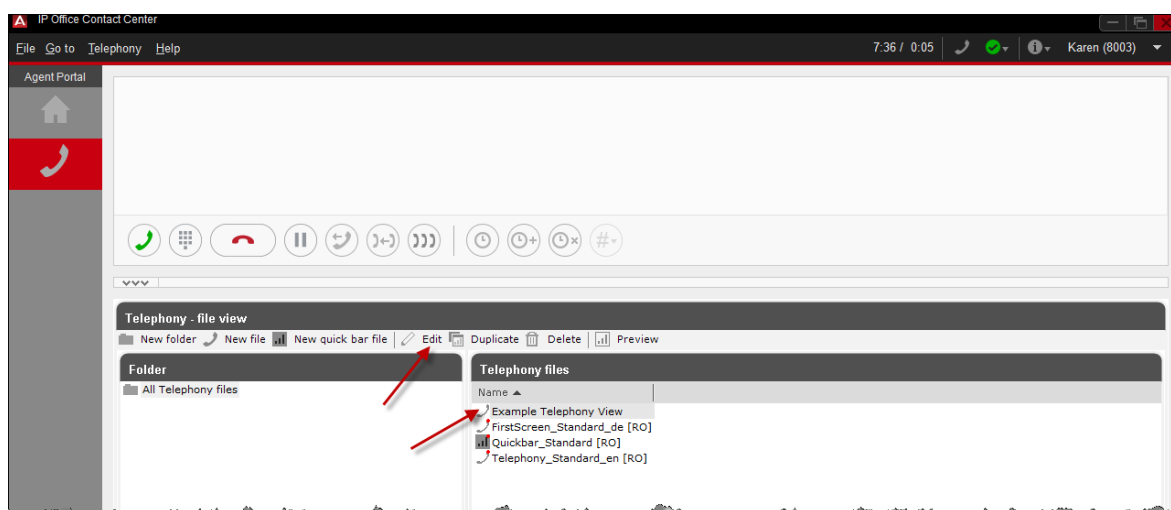
43. The configured Telephone Group is displayed.



44. Navigate to the Telephony View.

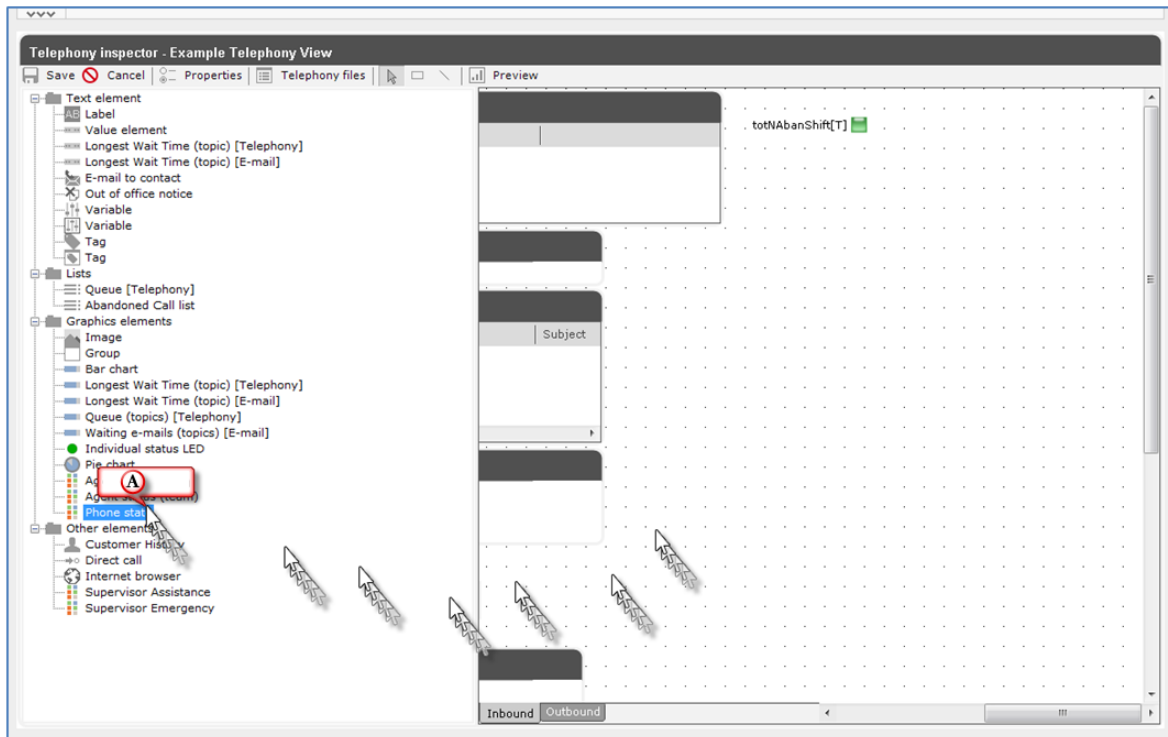


45. Select the duplicated file to be edited, and then click the **Edit** button.



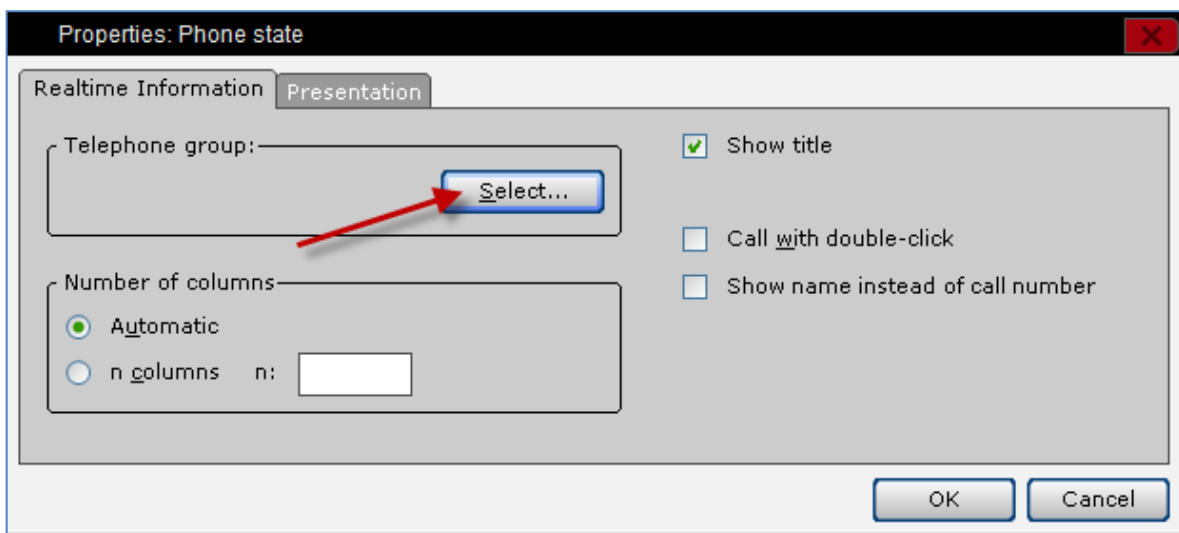


46. Click on the **Phone state** element and drag it to the Working Area.

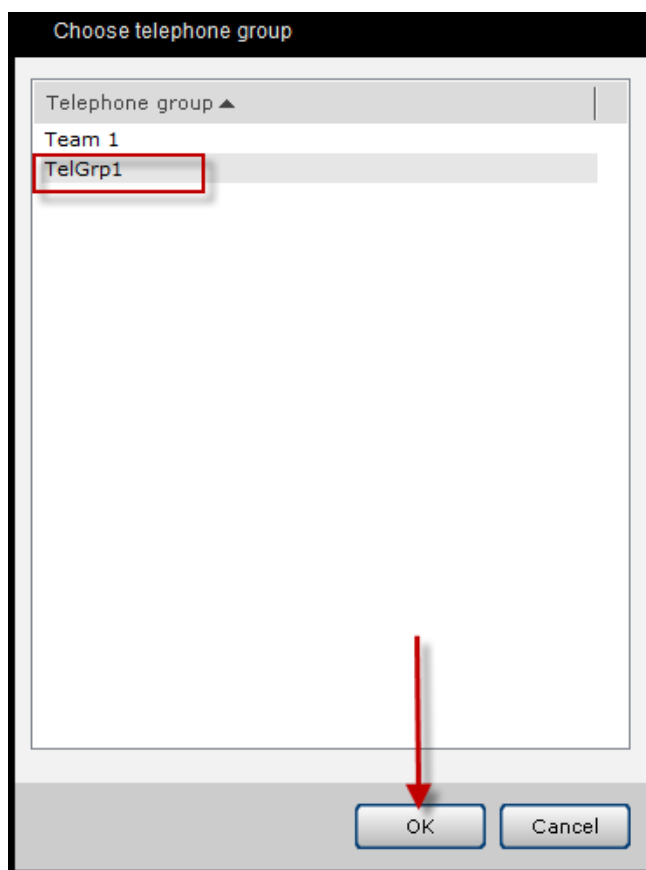


A. Click and drag.

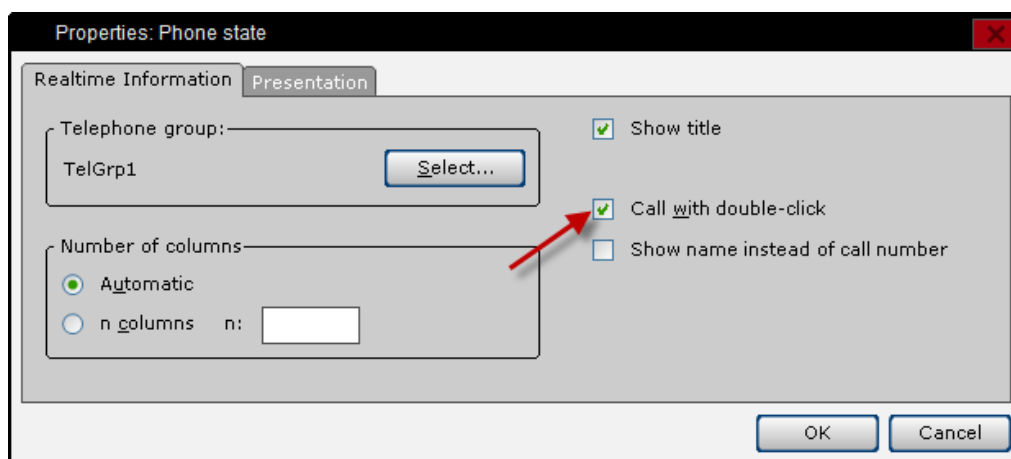
47. The **Properties** dialogue box is displayed. Click the **Select** button.



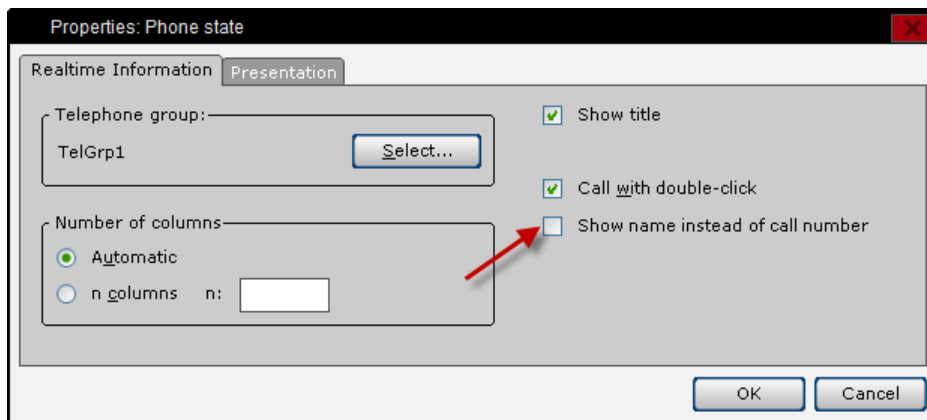
48. Select the previously configured **Telephone Group**. Click the **OK** button.



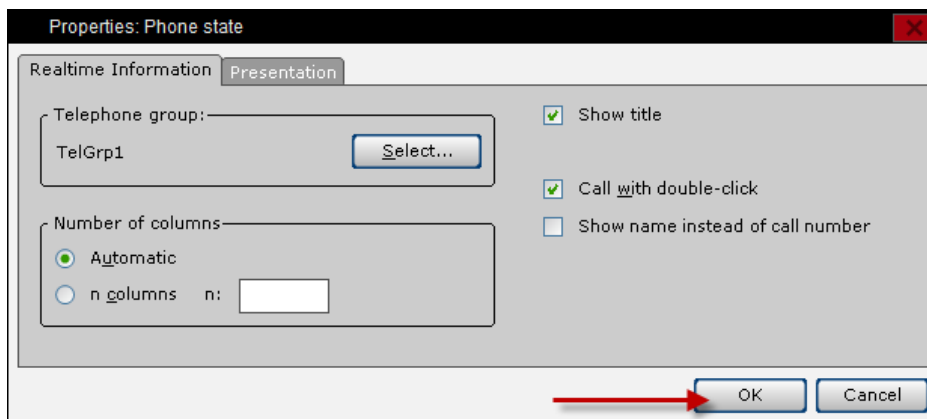
49. The phones within the group can be called by double clicking on their associated element. To activate this feature, select the **Call with double click** check box.



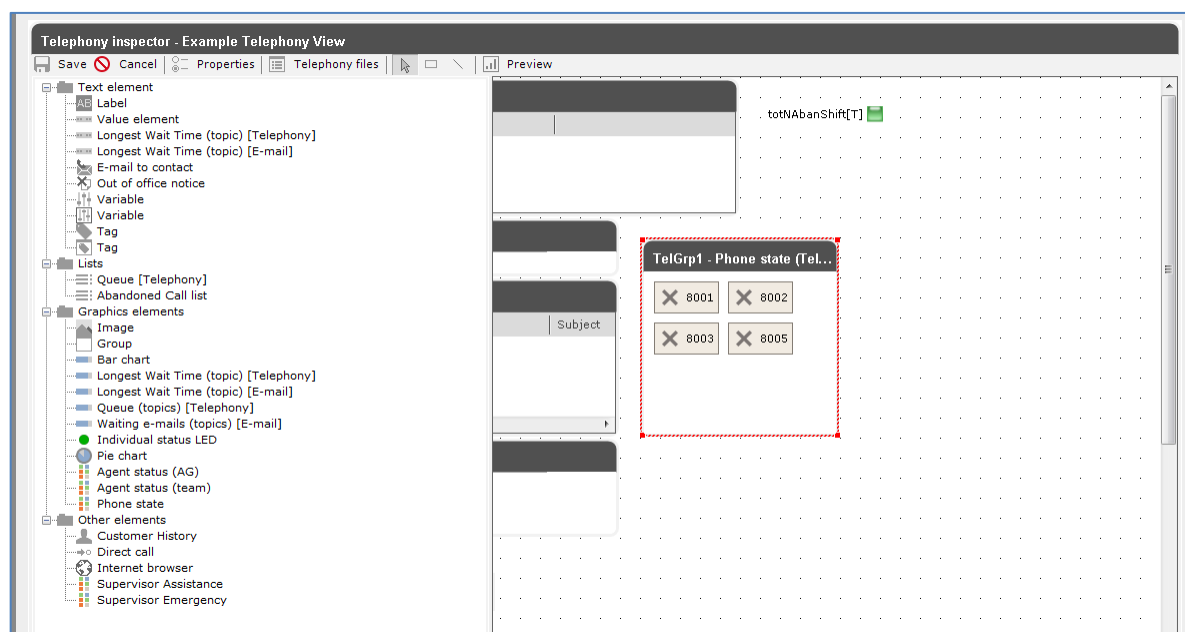
50. If required, the element can also be configured to display the associated number rather than agent's name. To activate this feature, click the **Show number instead of name** check box.



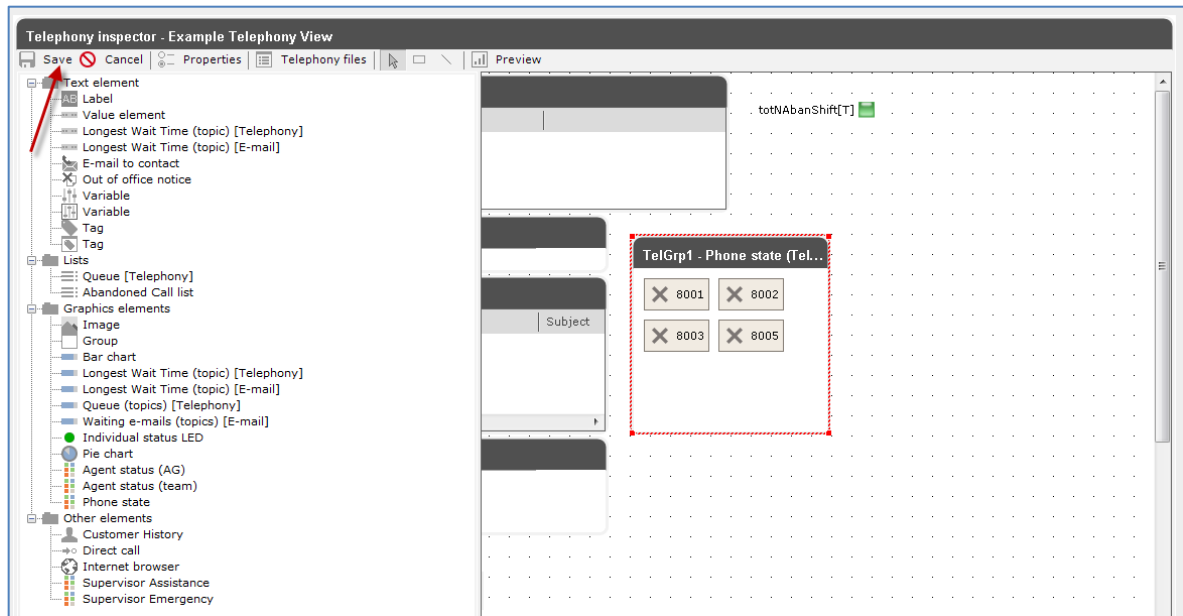
51. Click the **OK** button.



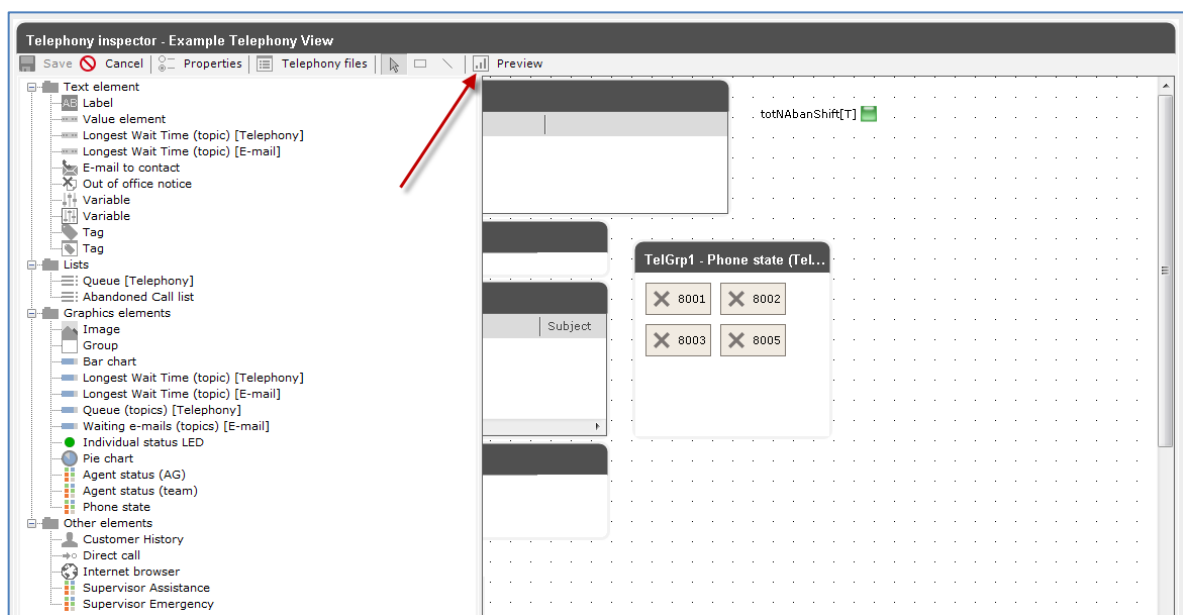
52. The Telephone Group element is displayed.



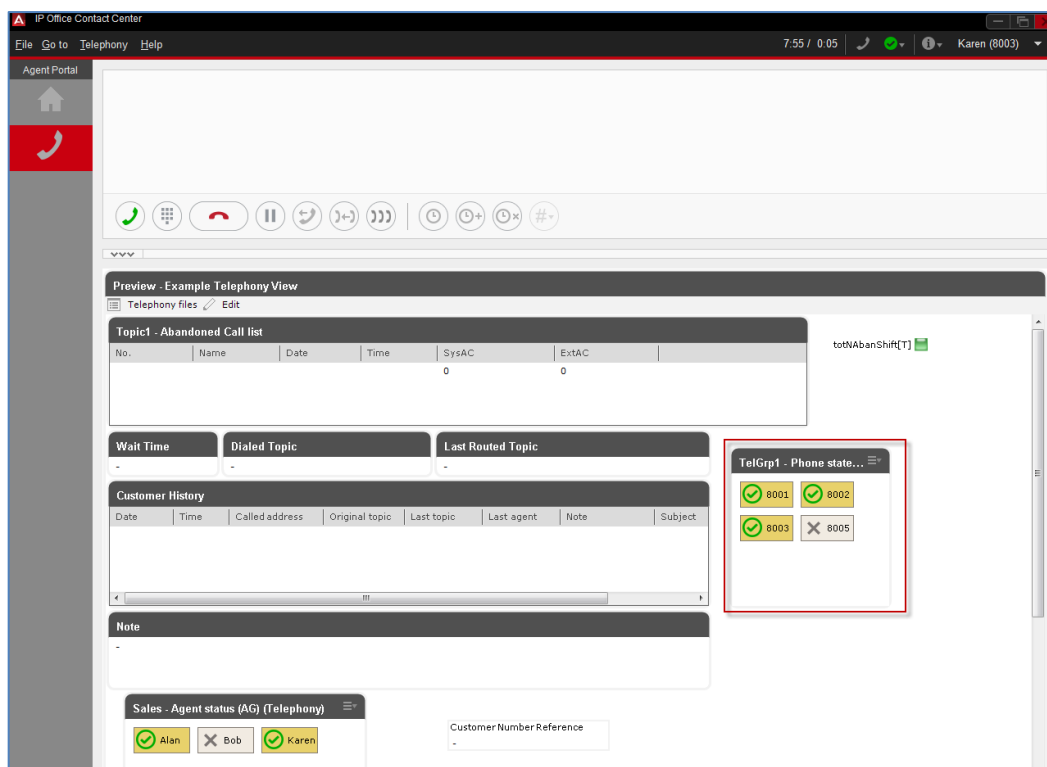
53. Click the **Save** button.



54. Click the **Preview** button.



55. The configured element is displayed.



56. Click on the expand icon and the status icons are displayed.



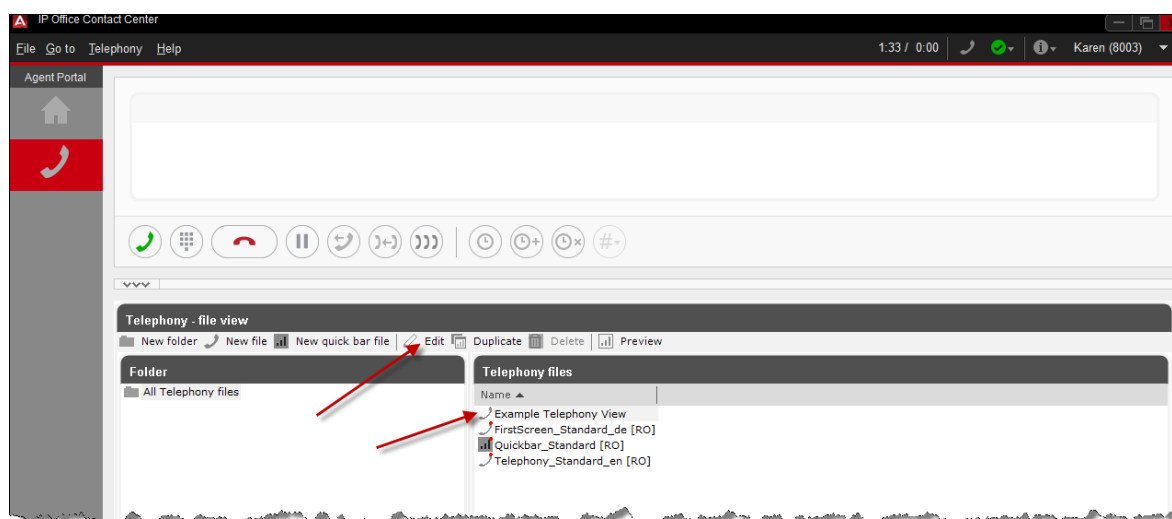
58. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Other Elements

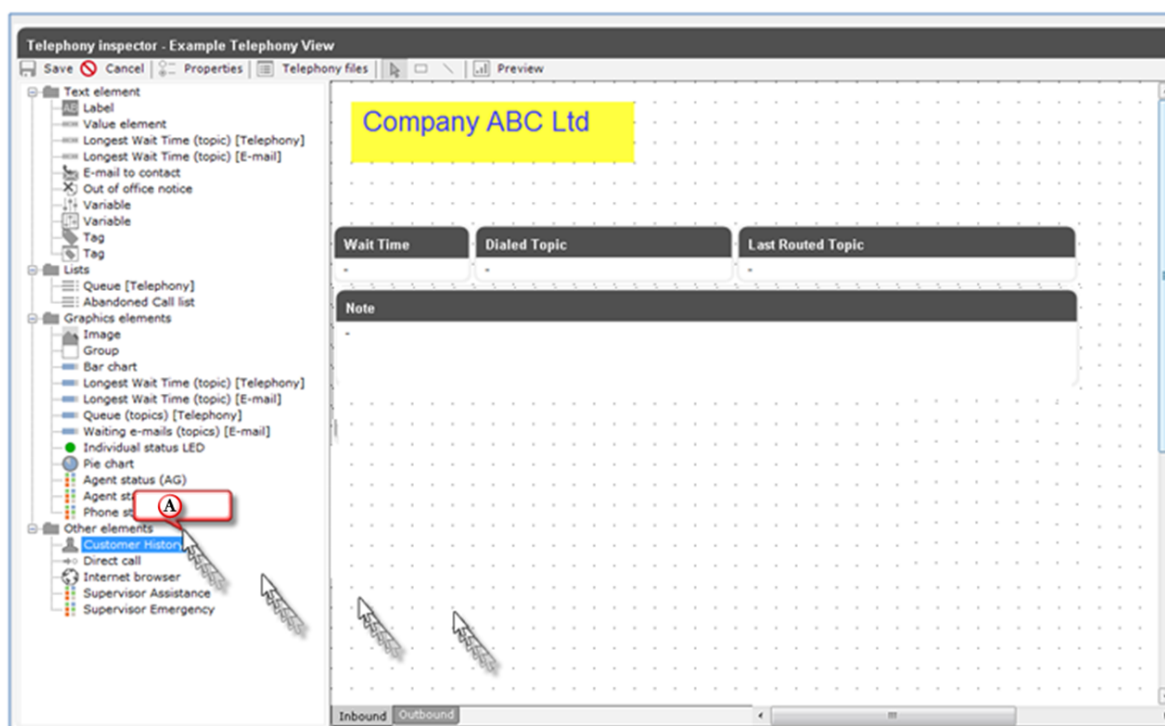
### Adding a Customer History Element to the Working Area

The Customer History Element can be added to the Telephony View and configured with a variety of parameters that will display on the User interface when a customer call is presented to the agent. These parameters can include the Date and Time of the customer's previous call, the topic that was presented with their call, their telephone number, and the last agent the customer conversed with etc.

1. Select the duplicated file to be used and click the **Edit** button.

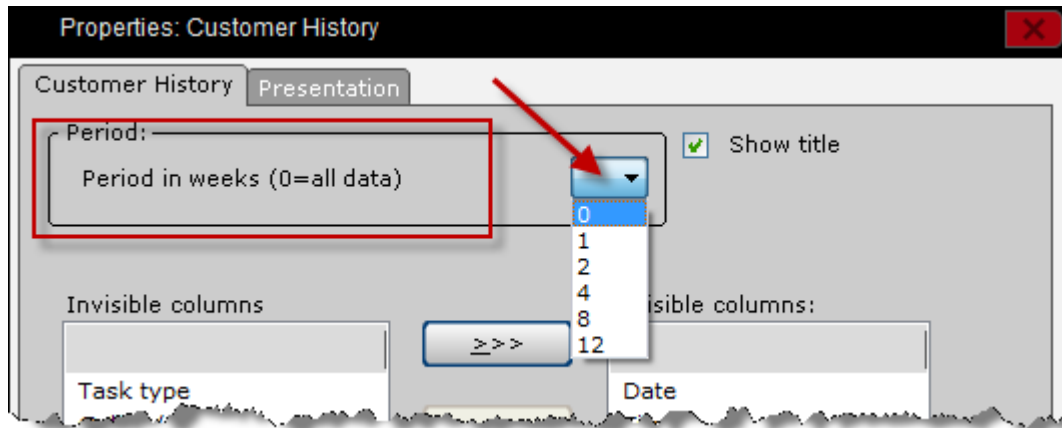


2. Select the **Customer History** element and drag it onto the Working Area.

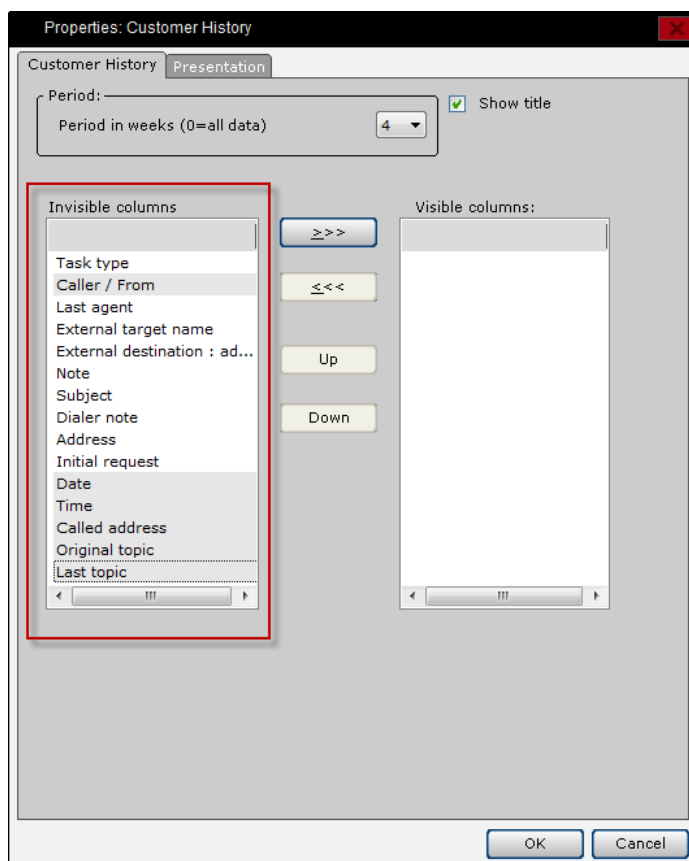


A. Click and drag

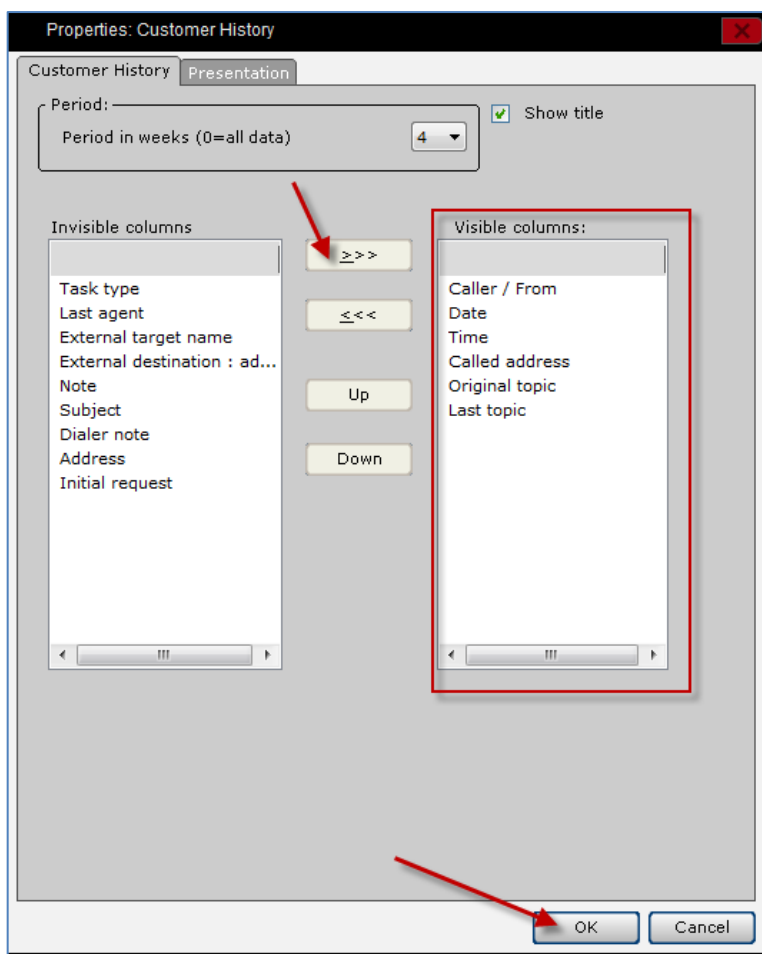
3. The **Properties** dialogue box is displayed. Select the Period in weeks drop down box. You can define the period of time to be reflected in the Customer History element. The period can be defined as 0 all data, or up to a 12 week period.



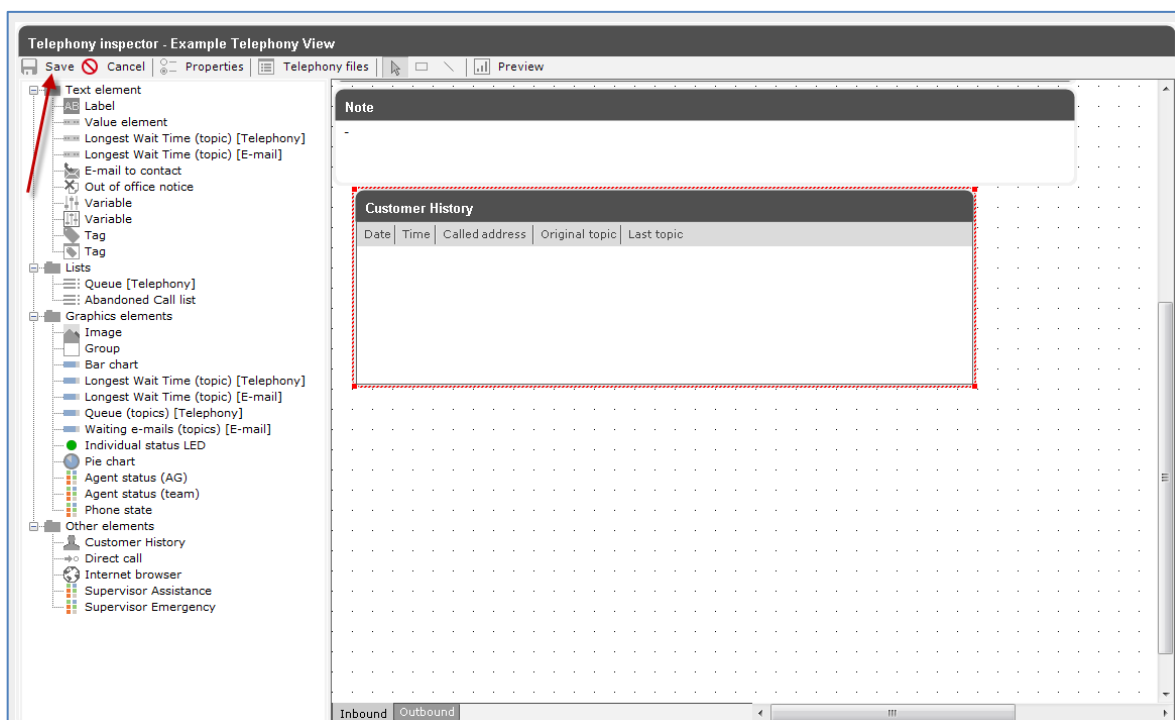
4. From the **Invisible Columns** panel, select the required parameters to be utilized with this element.



5. Click the right facing arrow button. The parameters are moved to the **Visible Columns** panel. Click the **OK** button.

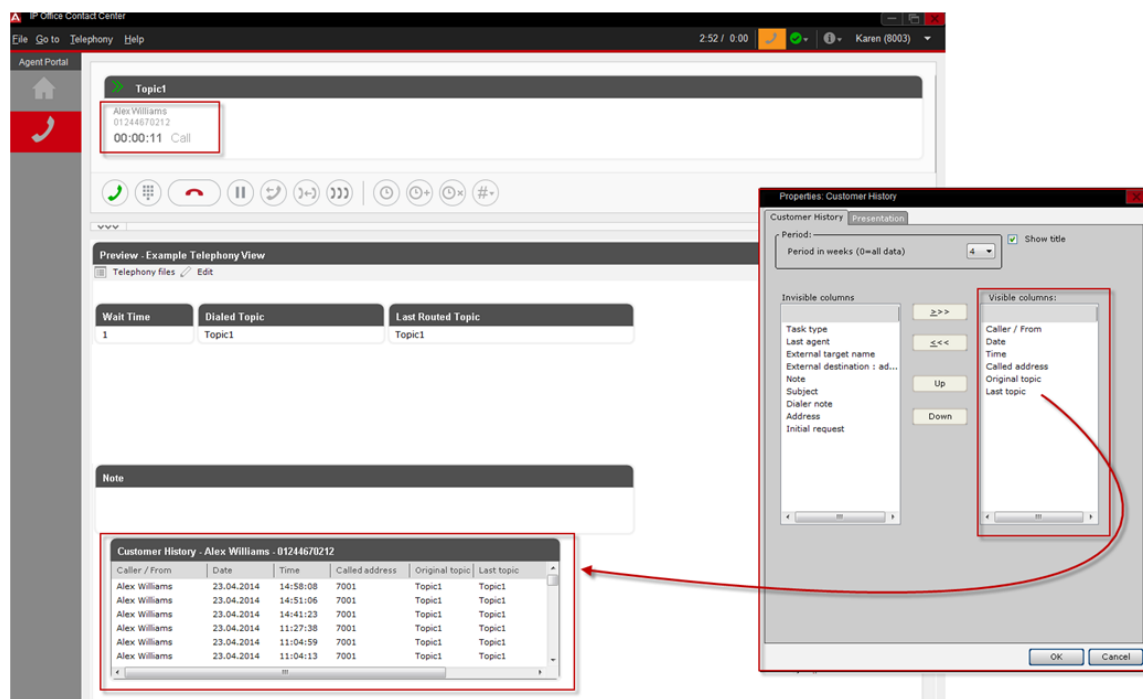


6. The configured element is displayed. Click the **Save** button.





7. Click the **Preview** button.
8. The configured element is displayed. When the customer's call is presented to the agent, the Customer History element will display details relating to the parameters previously defined.

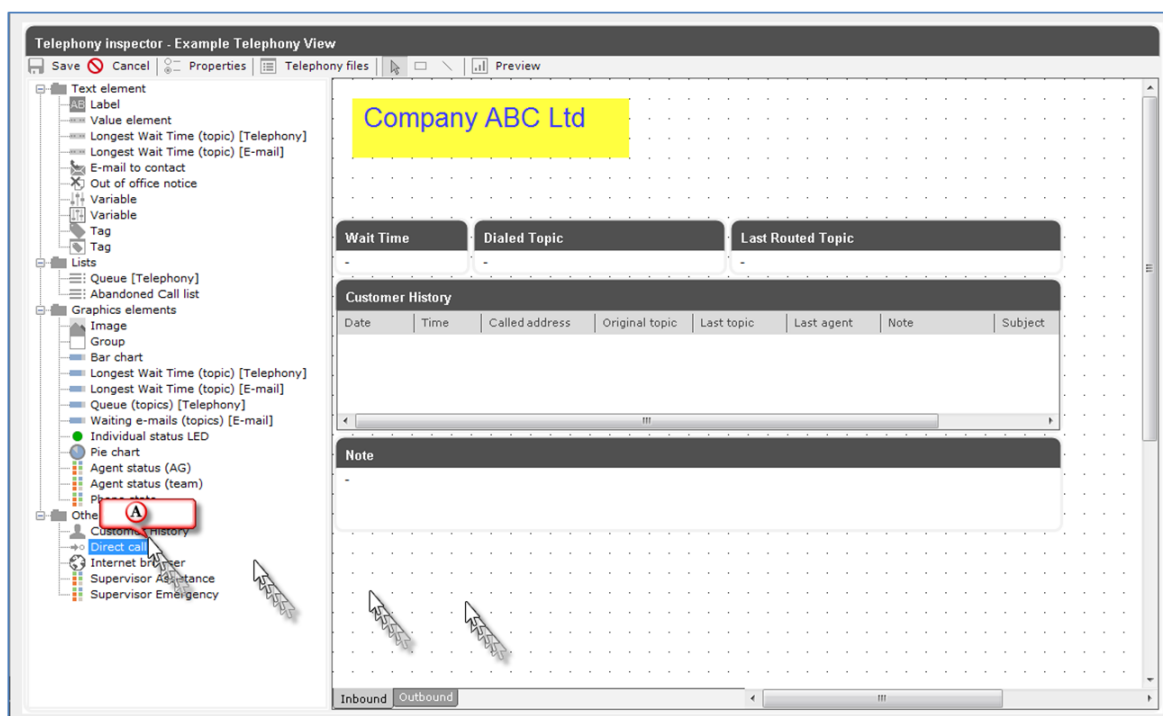


9. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

## Adding an Direct Call Element to the Working Area

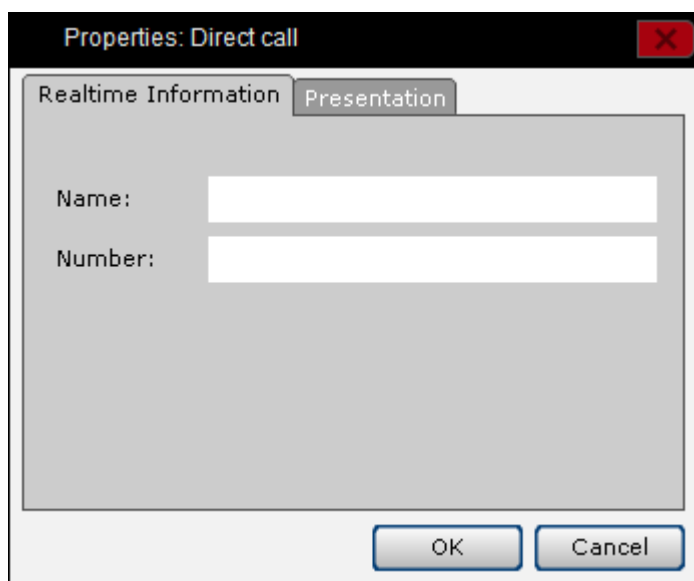
A Direct Call element can be configured that allows the agent to click on the element and directly call a configured number, in a similar manner to using a speed dial / Directory.

1. Select the **Direct Call** element and drag it onto the Working Area.

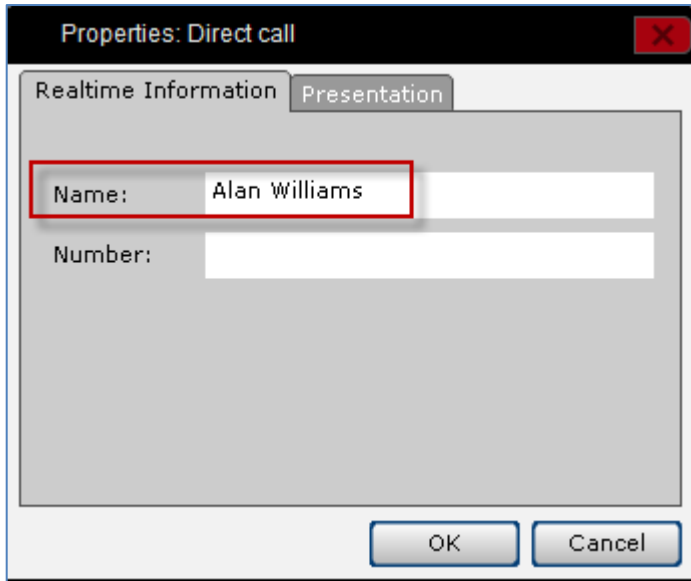


A. Click and drag.

2. The **Properties** dialogue box is displayed.

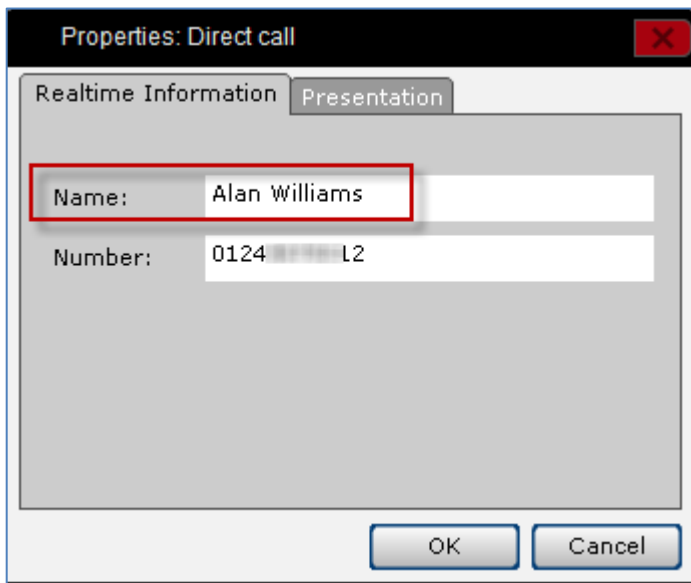


3. Enter a **Name** to identify the Direct Call element.



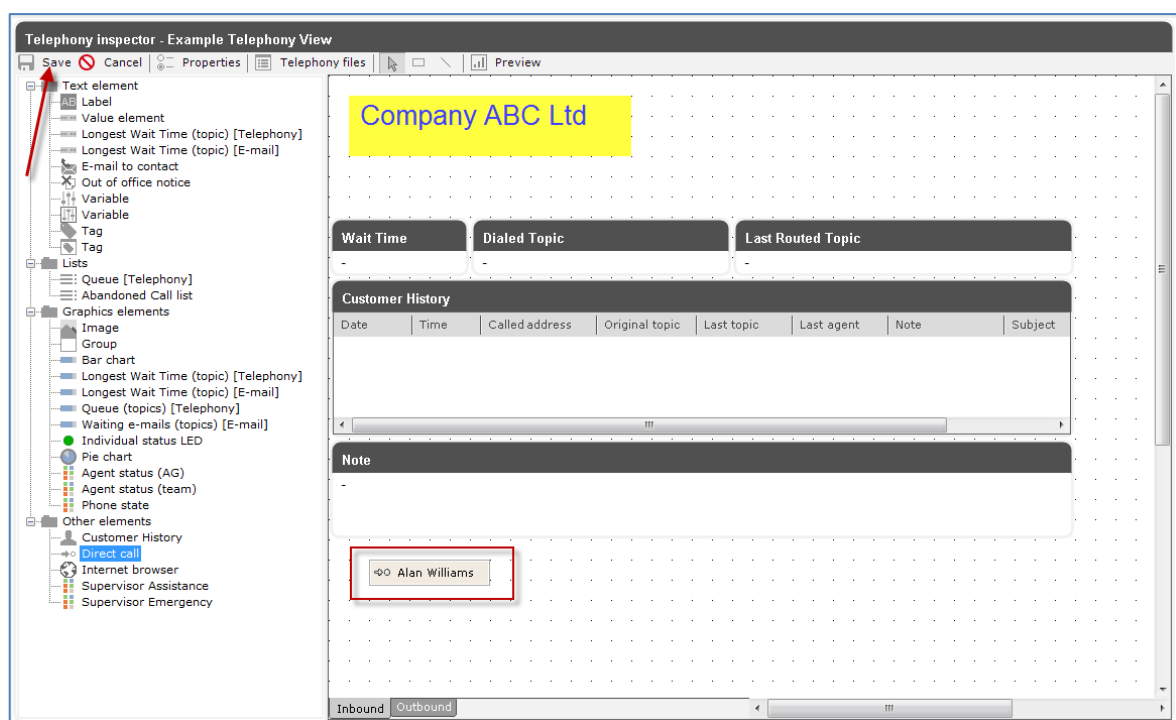
The screenshot shows a dialog box titled "Properties: Direct call" with a red close button in the top right corner. It has two tabs: "Realtime Information" and "Presentation", with "Presentation" being the active tab. Inside the dialog, there are two text input fields. The first field is labeled "Name:" and contains the text "Alan Williams"; this field is highlighted with a red rectangular border. The second field is labeled "Number:" and is currently empty. At the bottom of the dialog, there are two buttons: "OK" and "Cancel".

4. Enter the number to be dialed. Include any access code digit as required based upon the IP Office configuration. Click the **OK** button.

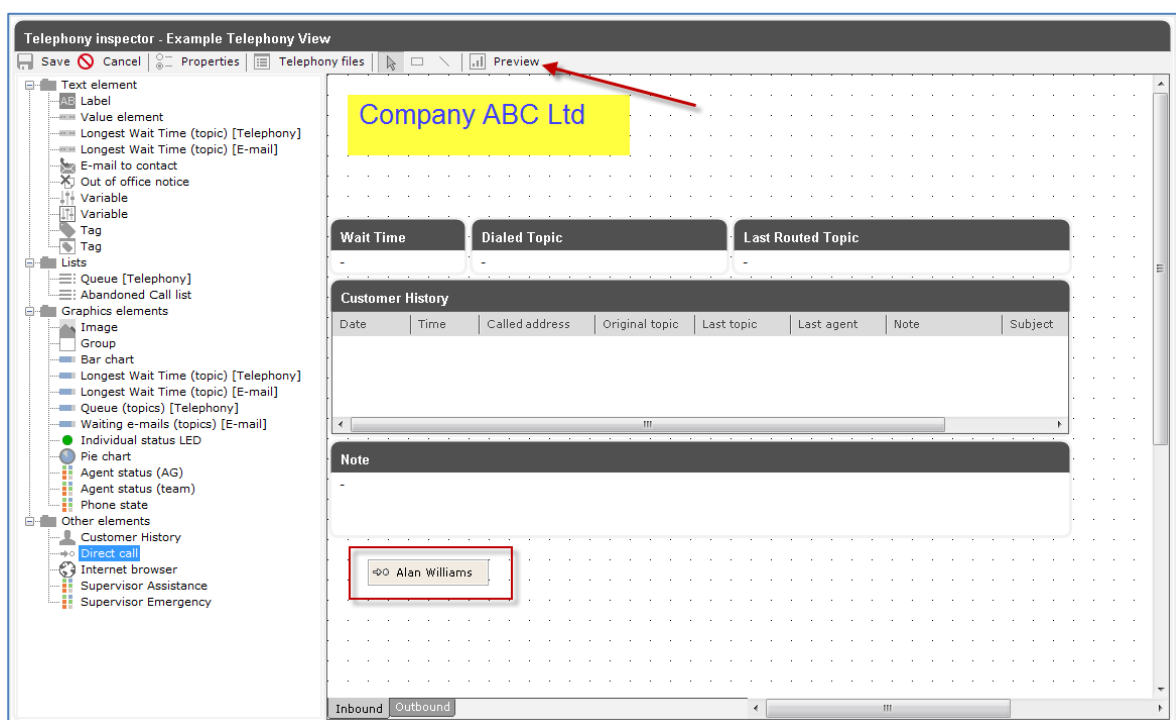


This screenshot shows the same "Properties: Direct call" dialog box, but now the "Number:" field contains the text "0124" followed by four small squares (masking characters) and the number "12". The "Name:" field remains "Alan Williams" and is still highlighted with a red border. The "OK" and "Cancel" buttons are still present at the bottom.

5. The configured element is displayed. Click the **Save** button.



6. Click the **Preview** button.

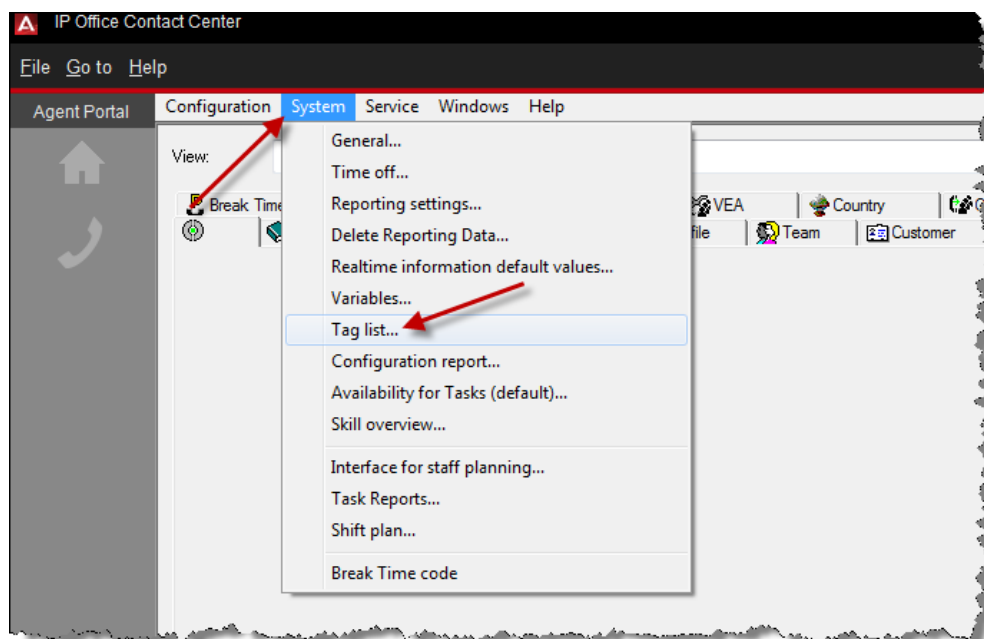


7. The configured element is displayed. A call can be made to the configured number by double clicking on the **Direct call** element.
8. To use this file in the Telephony view, please refer to the **Selecting the File to be Used in the Telephony View** section of this guide.

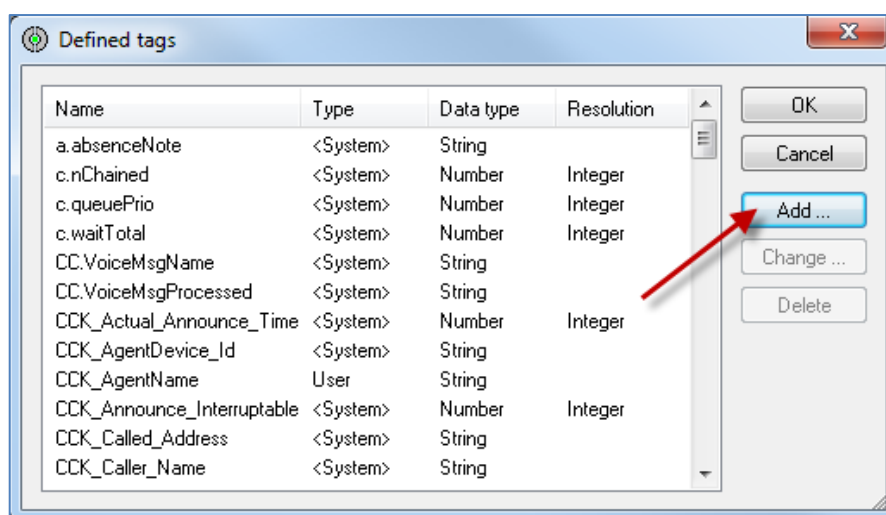
## Adding an Internet Browser Element to the Working Area

An Internet Browser element can be used to display a web page when a call is routed to a specific Topic. For example, a sales website could be configured to open when calls are directed to a 'special offers' Topic.

1. To complete this configuration a custom call tag must first be defined. From the configuration interface, select **System** followed by **Tag List**.



2. The **Defined tags** window is displayed. Click the **Add** button.



3. Name the tag.

Tag - Create

Name:

OK Cancel

Type

☐ System-specific

☒ User-defined

☐ Skill

Data type:

Resolution:

☐ Can be changed by CGI server

☐ Overwrite-protection

Applying Tags into Task resulting from Conference/Transfer

Tag from

☒ Ignore

☐ Apply, where applicable overwrite

☐ Apply only if transferred, where applicable overwrite

☐ Apply only if not available in the original task

4. Ensure that **User Defined** is selected as the **Type**.

Tag - Create

Name:

OK Cancel

Type

☐ System-specific

☒ User-defined

☐ Skill

Data type:

Resolution:

☐ Can be changed by CGI server

☐ Overwrite-protection

Applying Tags into Task resulting from Conference/Transfer

Tag from

☒ Ignore

☐ Apply, where applicable overwrite

☐ Apply only if transferred, where applicable overwrite

☐ Apply only if not available in the original task

5. Select **String** as the **Data type**.

Tag - Create

Name: HTMLtag

OK Cancel

Type

- ☐ System-specific
- ☒ User-defined
- ☐ Skill

Data type: String

Resolution:

☐ Can be changed by CGI server

☐ Overwrite-protection

Applying Tags into Task resulting from Conference/Transfer

Tag from

- ☒ Ignore
- ☐ Apply, where applicable overwrite
- ☐ Apply only if transferred, where applicable overwrite
- ☐ Apply only if not available in the original task

6. Click the **OK** button.

Tag - Create

Name: HTMLtag

OK Cancel

Type

- ☐ System-specific
- ☒ User-defined
- ☐ Skill

Data type: String

Resolution:

☐ Can be changed by CGI server

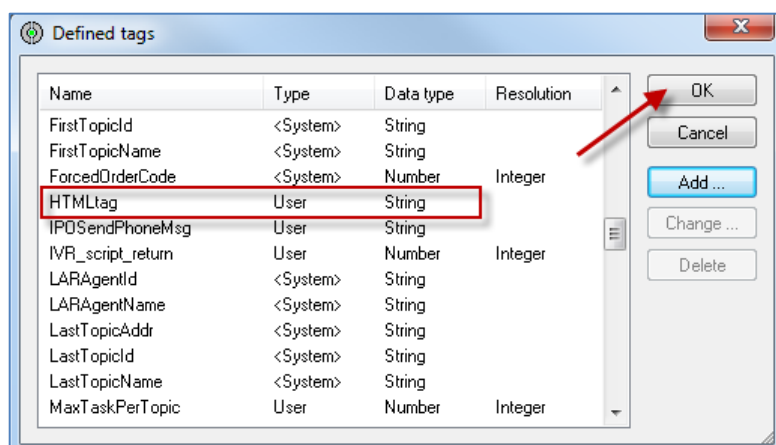
☐ Overwrite-protection

Applying Tags into Task resulting from Conference/Transfer

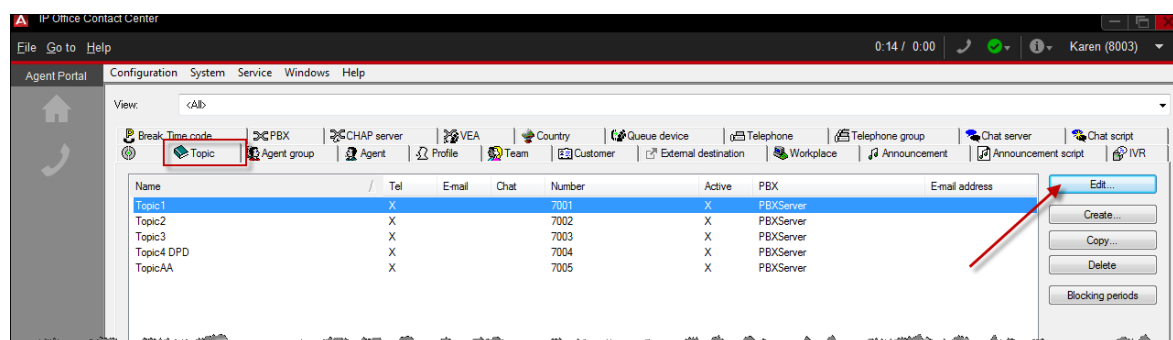
Tag from

- ☒ Ignore
- ☐ Apply, where applicable overwrite
- ☐ Apply only if transferred, where applicable overwrite
- ☐ Apply only if not available in the original task

7. The configured tag is displayed. Click the **OK** button.

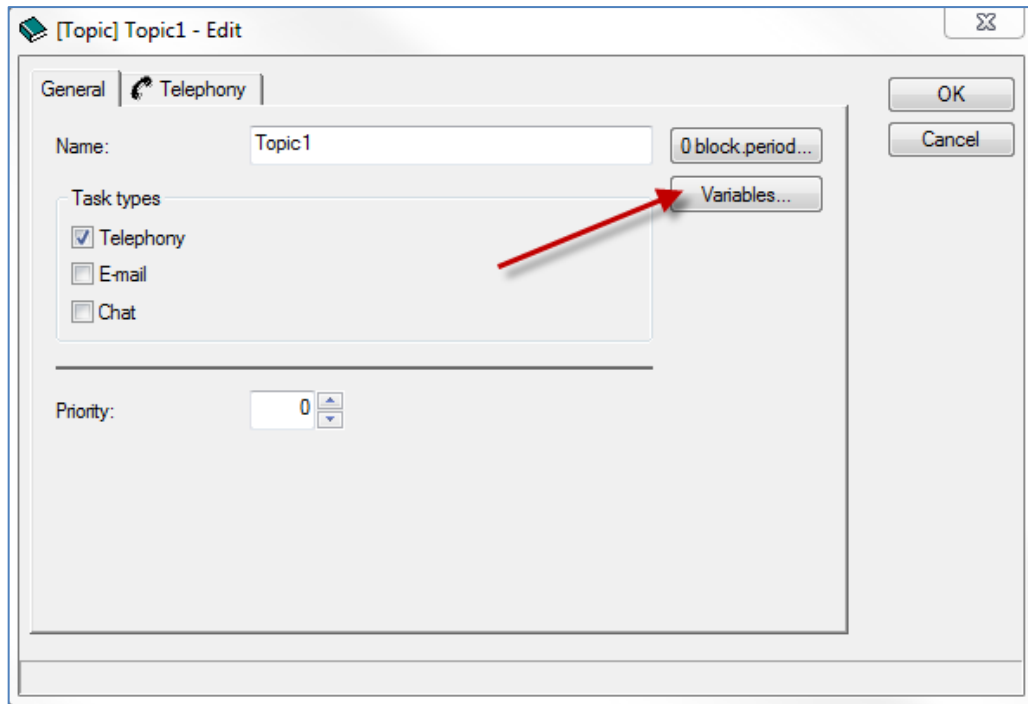


8. The call tag has to be assigned against a variable that is created within the required Topic. The variable will include the webpage to be opened when calls are made to this Topic. Click the **Topic** tab and select the Topic to be utilized. Click the **Edit** button.

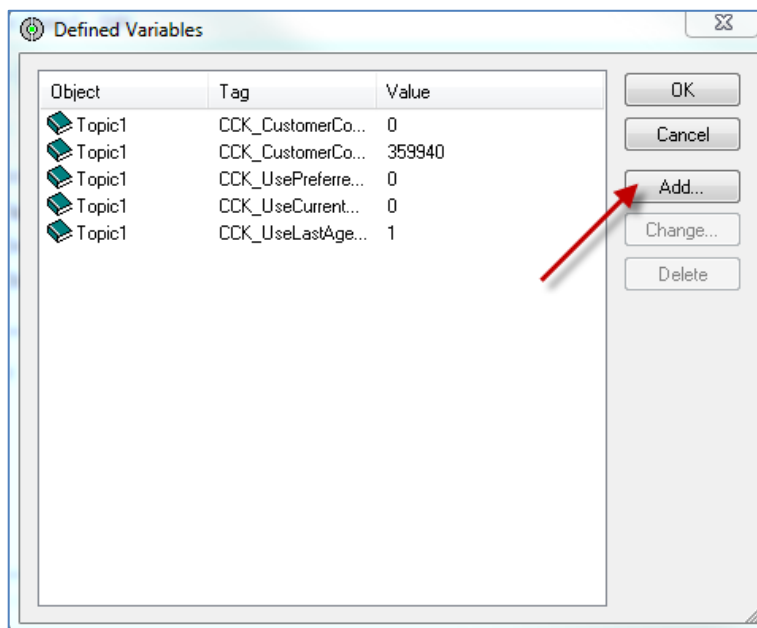


9. Click the **Variables** button.

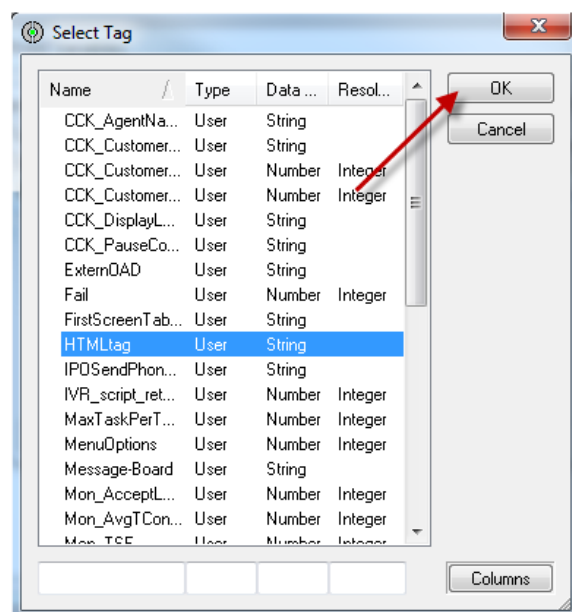
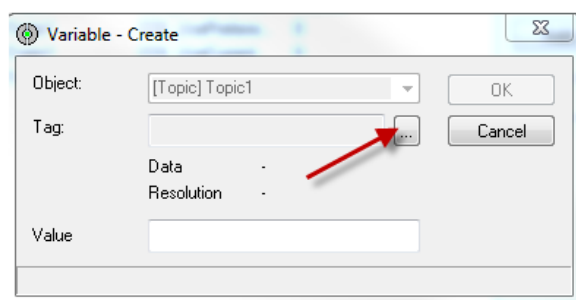




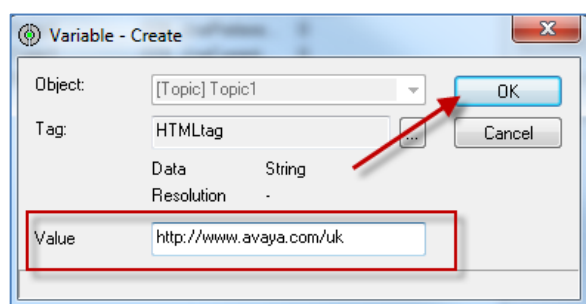
10. The **Defined Variable** dialogue box is displayed. Click the **Add** button.



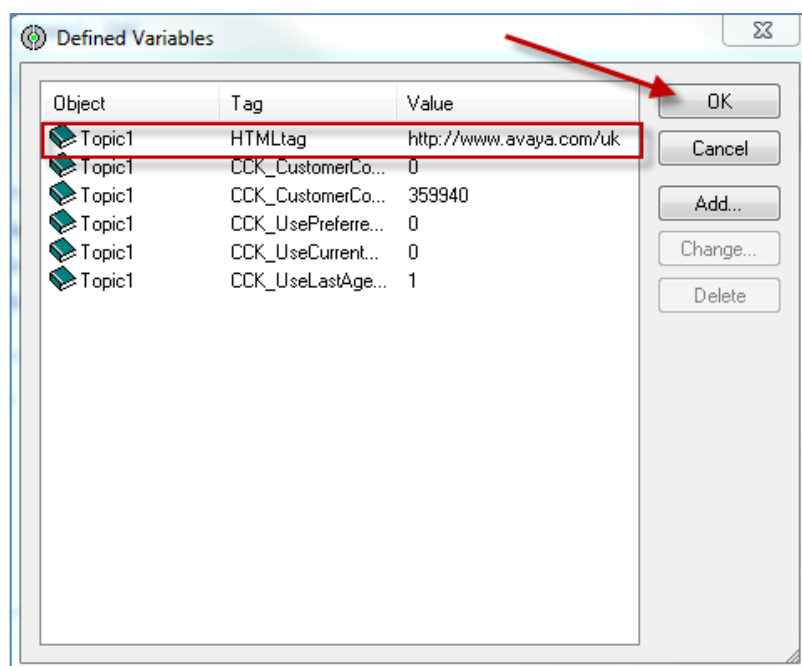
11. The **Variable – Create** dialogue box is displayed. Click the browser button and select the Tag that has previously been configured. Click the **OK** button.



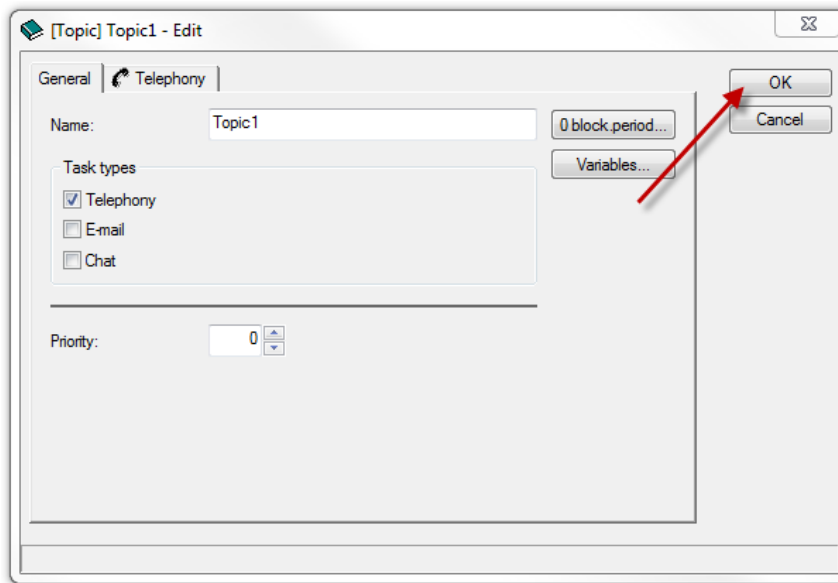
12. In the **Value** field, enter the URL of the web page to be utilized. Then click the **OK** button.



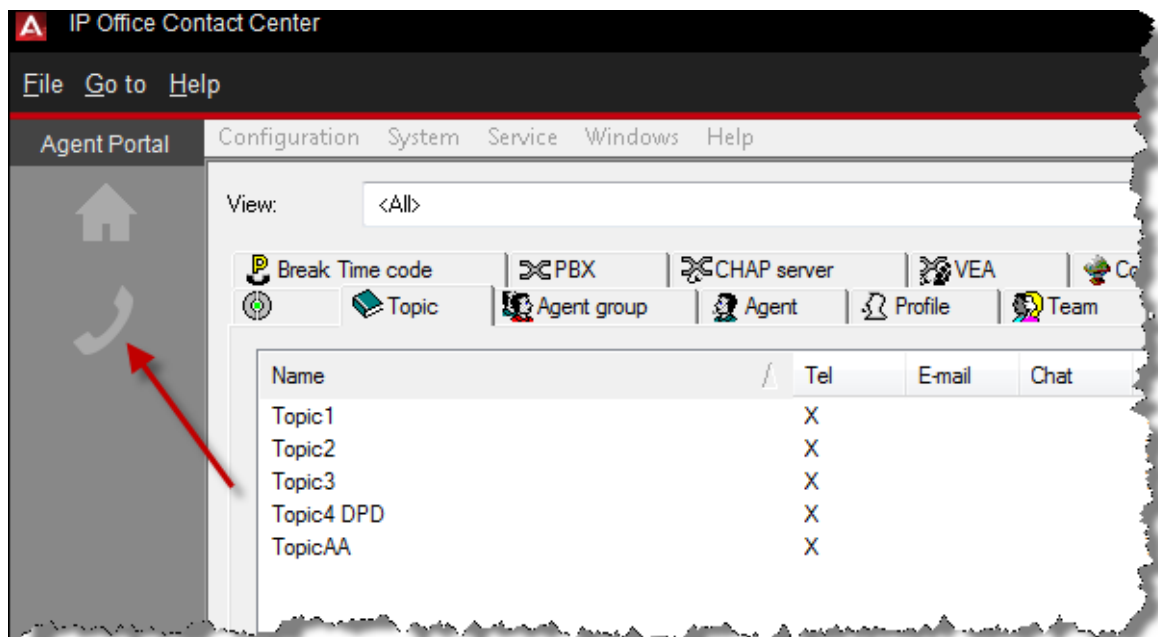
13. The defined variable is displayed, click the **OK** button.



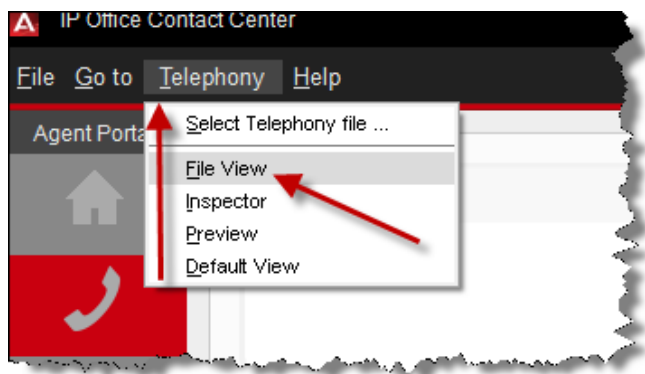
14. Click the **OK** button.



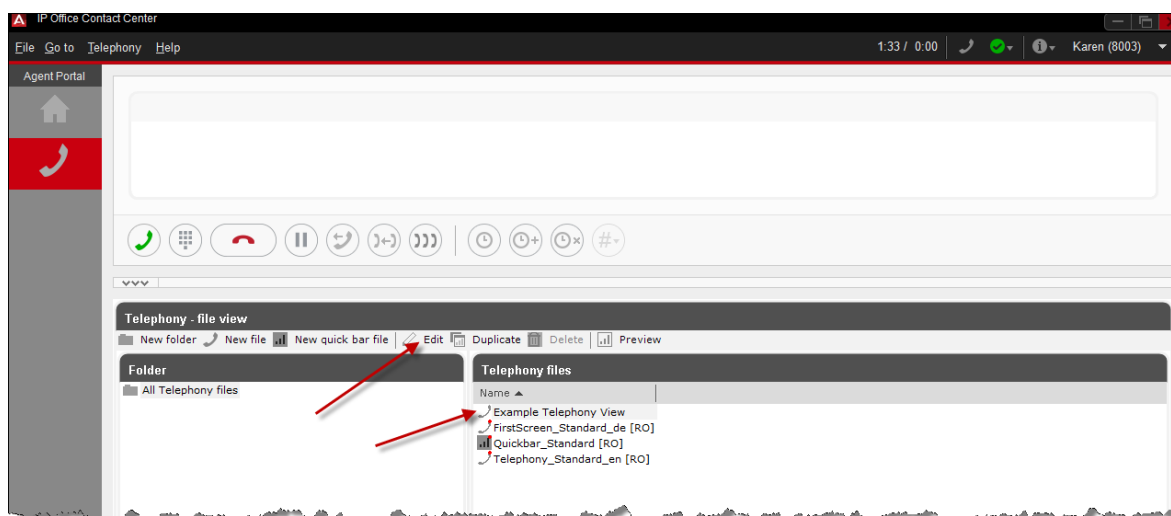
15. Navigate to the **Telephony View**.



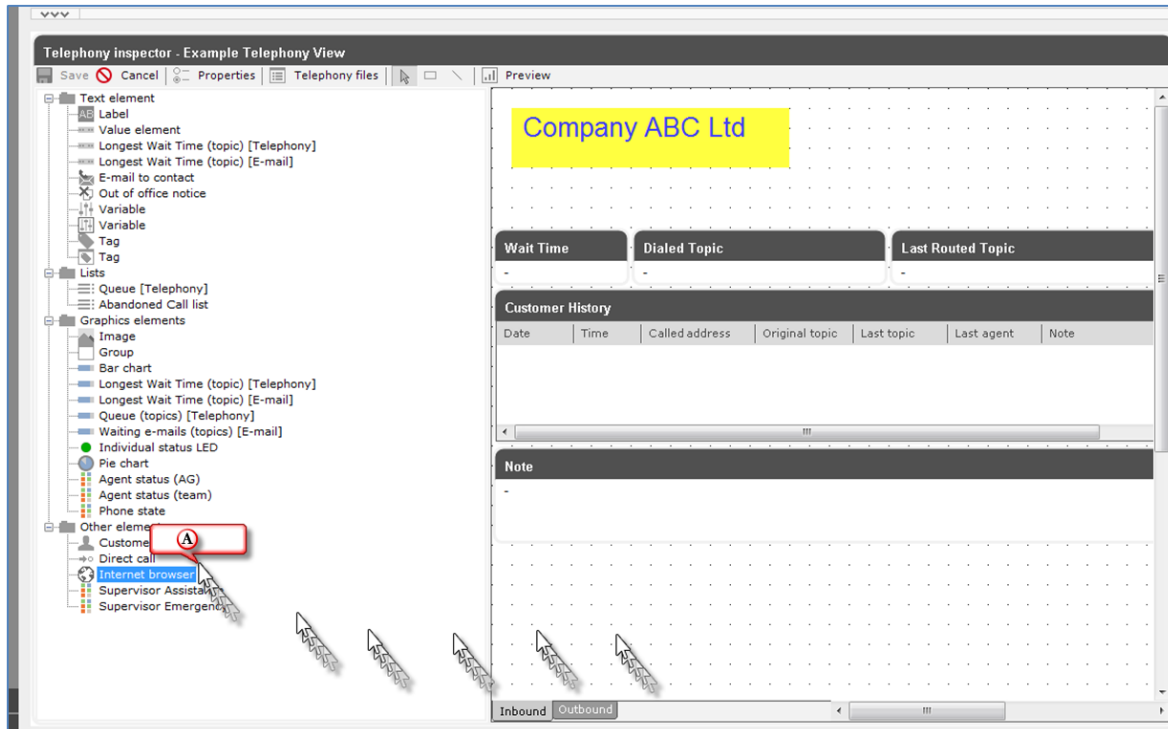
16. Select **Telephony** followed by **File View**.



17. Select the duplicated file to be used and click the **Edit** button.

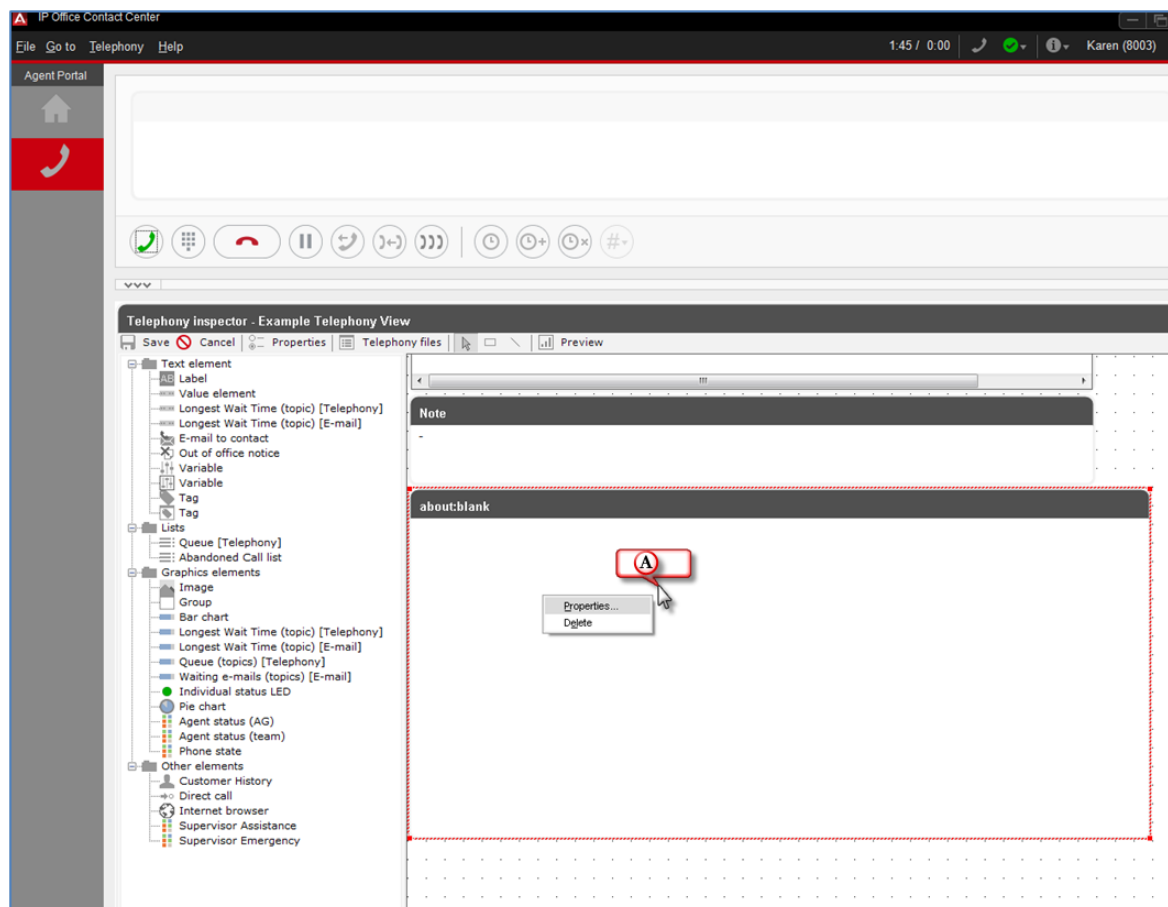


18. Select the **Internet Browser** element and drag it onto the Working Area.



A. Click and drag.

19. Right click on the element and select **Properties**.

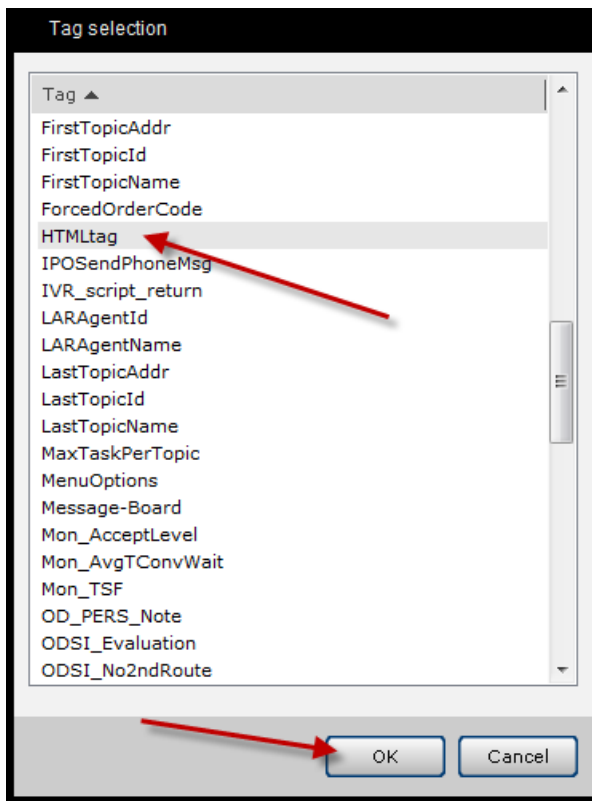


A. Right click.

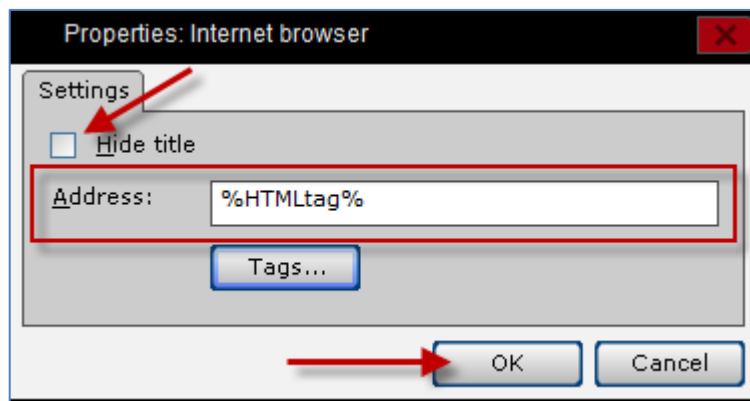
20. The **Properties** dialogue box is displayed. Click the **Tags** button.



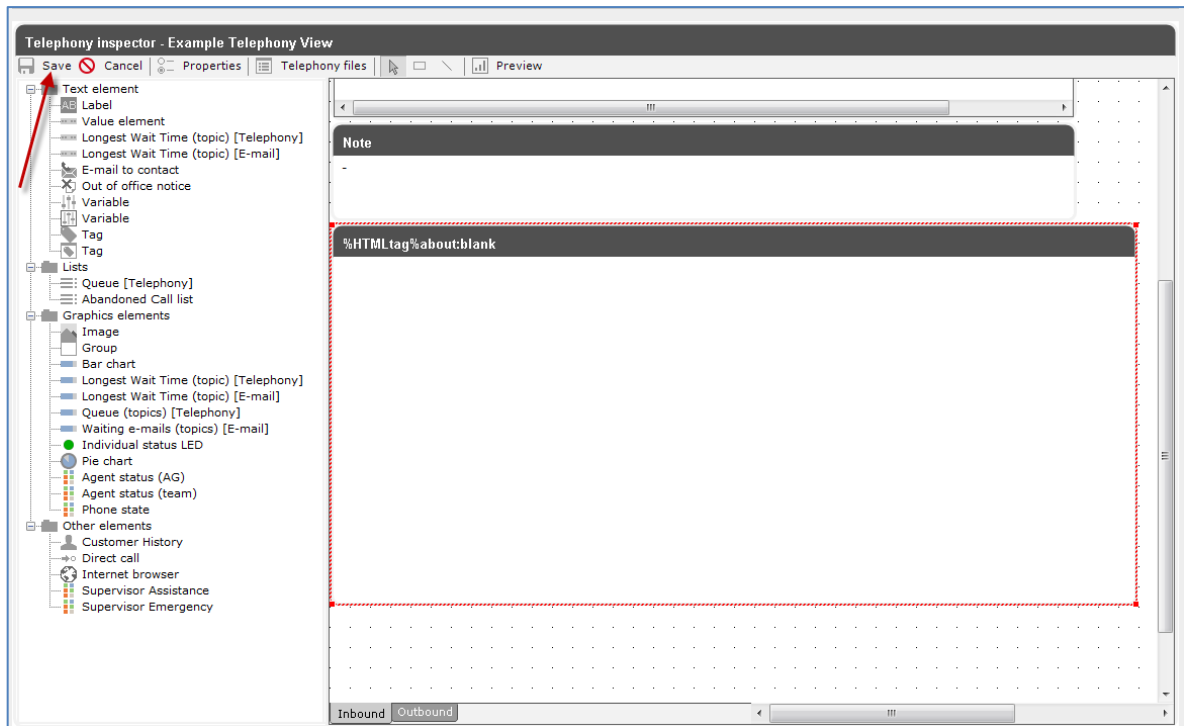
21. Select the previously configured Tag, and then click the **OK** button.



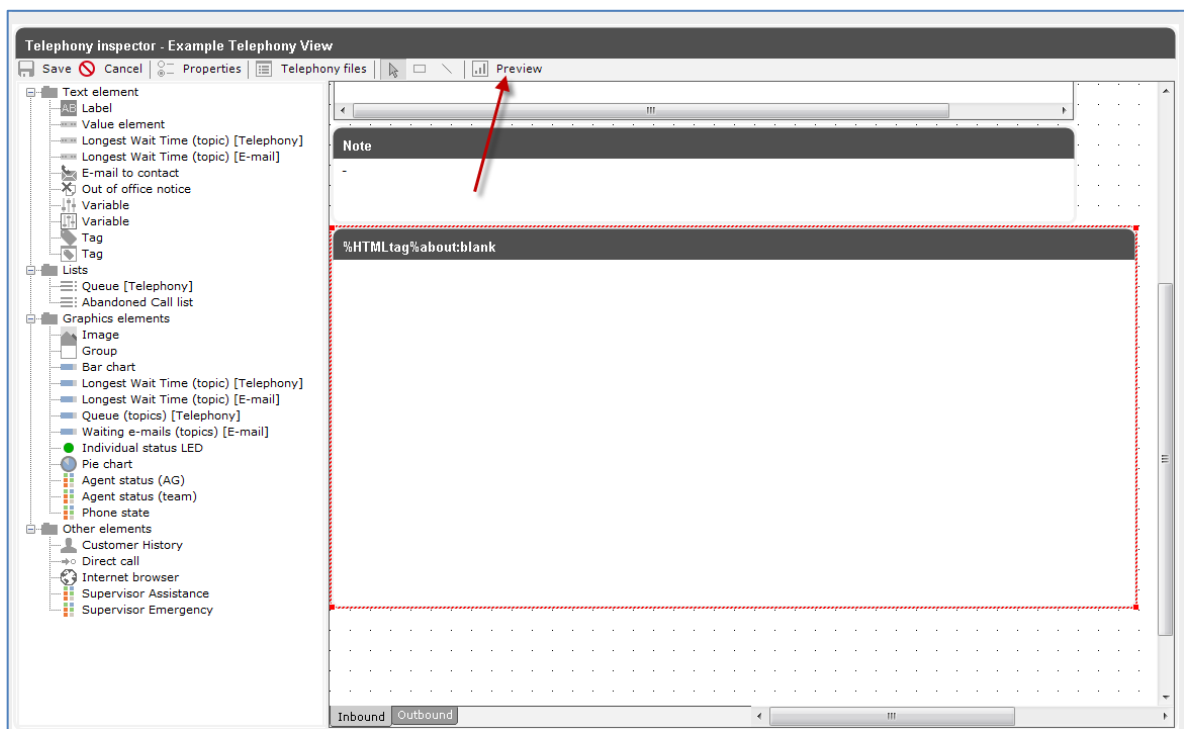
22. The selected **Address** is displayed. A URL title can also be displayed if required. Click the **OK** button.



23. Click the **Save** button.

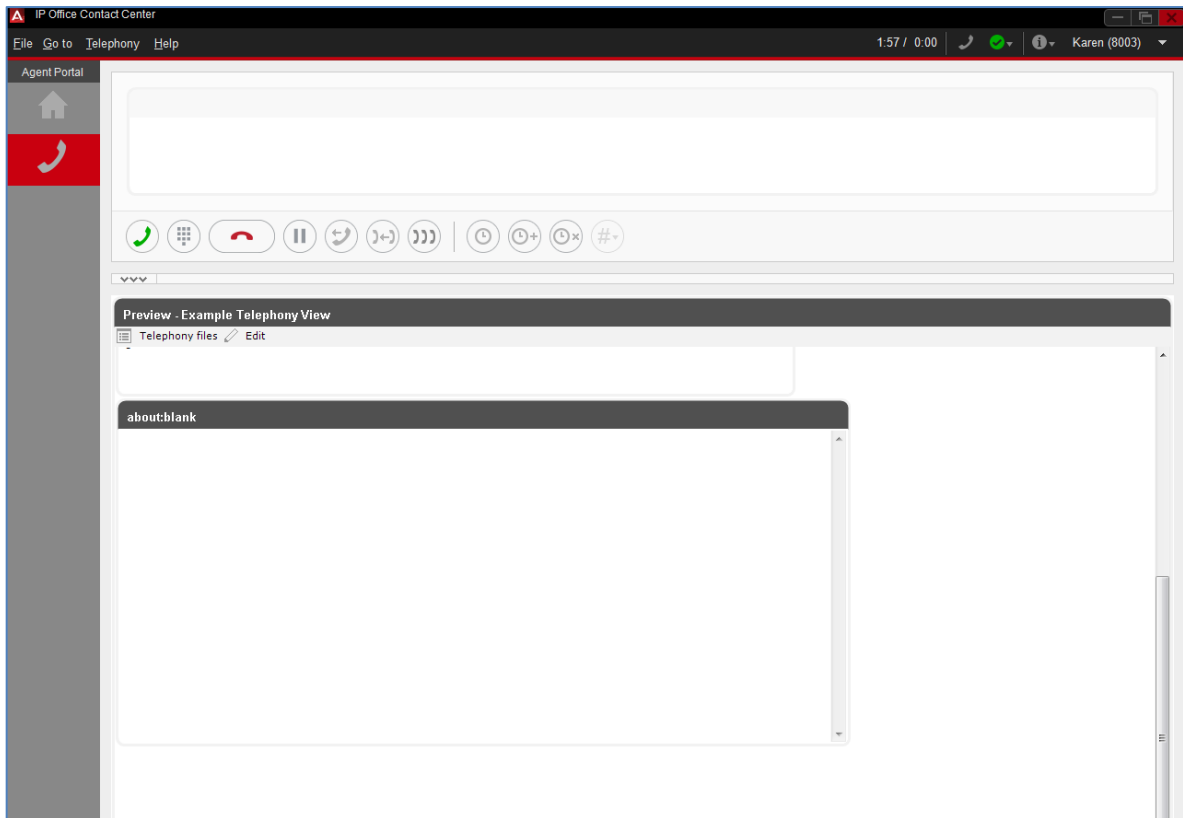


24. Click the **Preview** button.

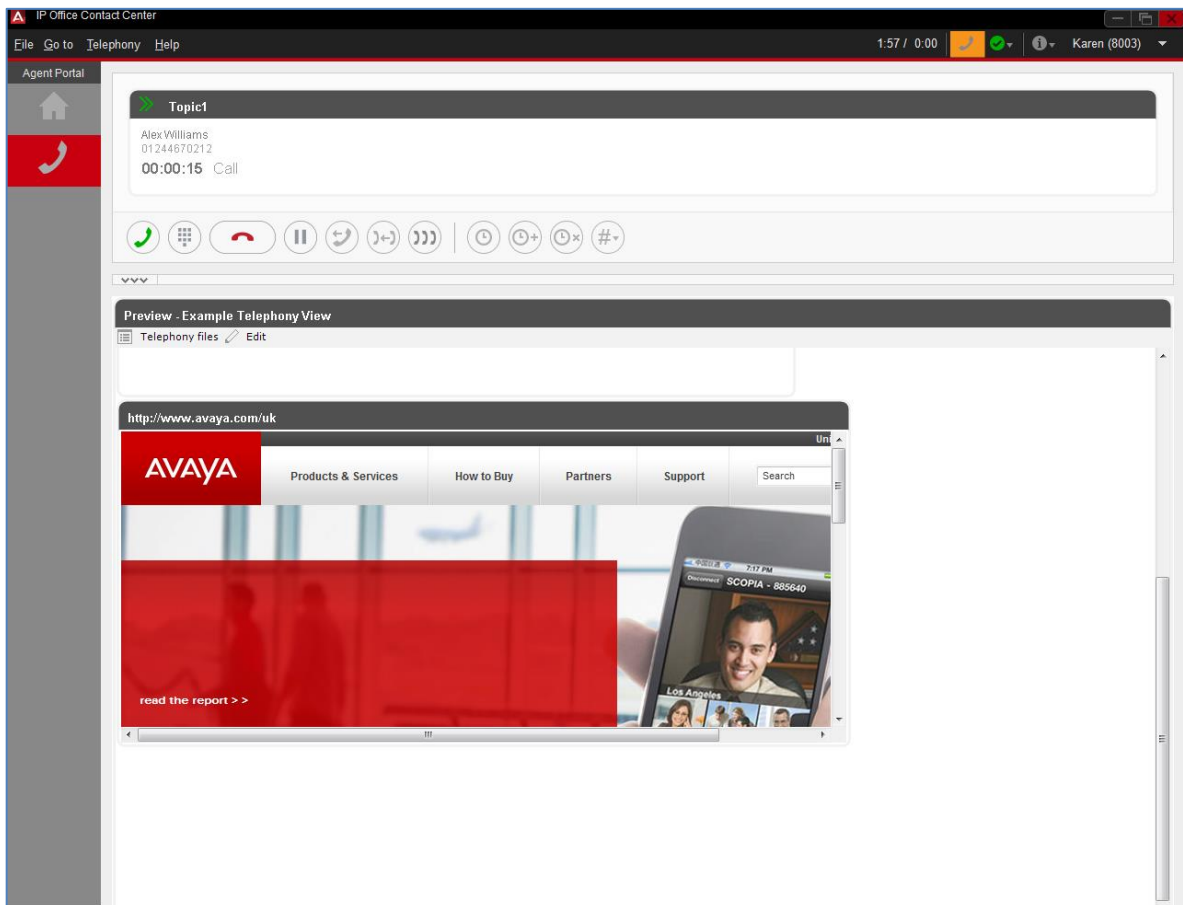


25. The Element is displayed.





26. When a call is presented to the Topic, the defined web page is launched.



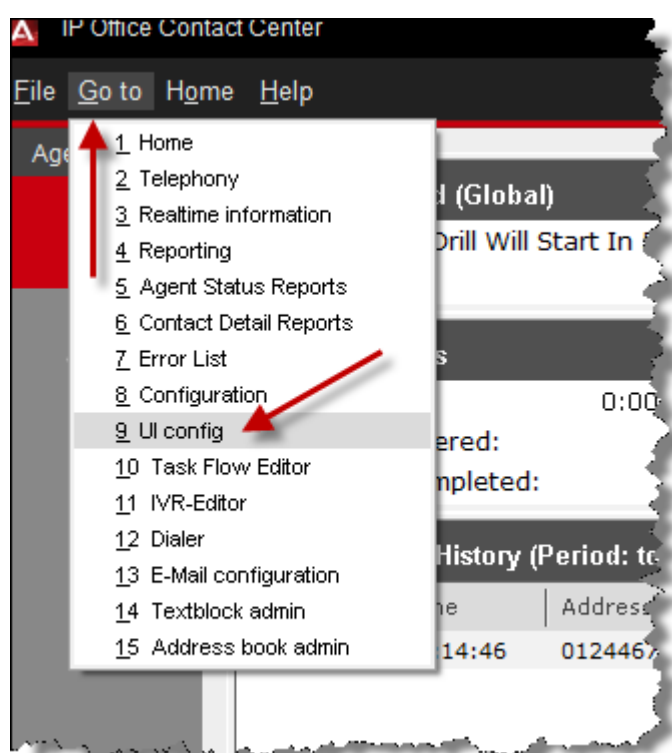
## Contact Bar – User Interface

The Contact Bar is used by an agent to make and receive calls and for call control purposes. Real-time call information is displayed to show call conversation duration in hours, minutes and seconds along with call status such as After Call Works.

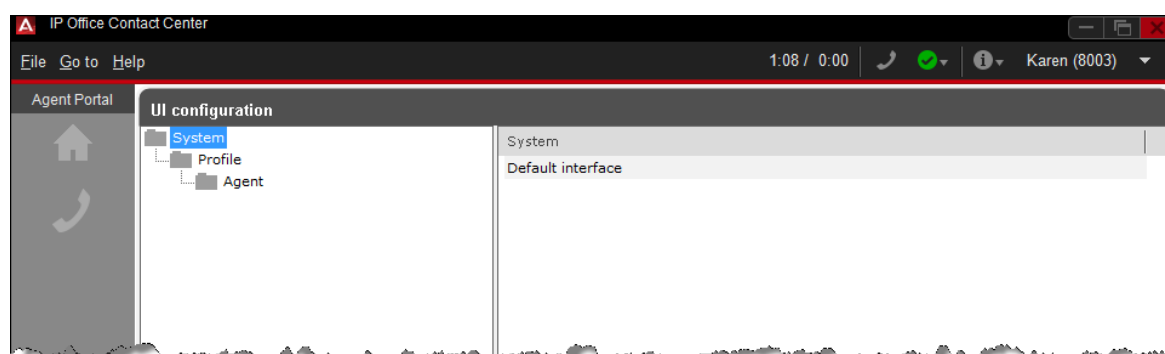
By using the Contact Bar, an agent can dial numbers to make a call, place a call in a conference, put a call on hold and transfer etc

To edit the Contact Bar:

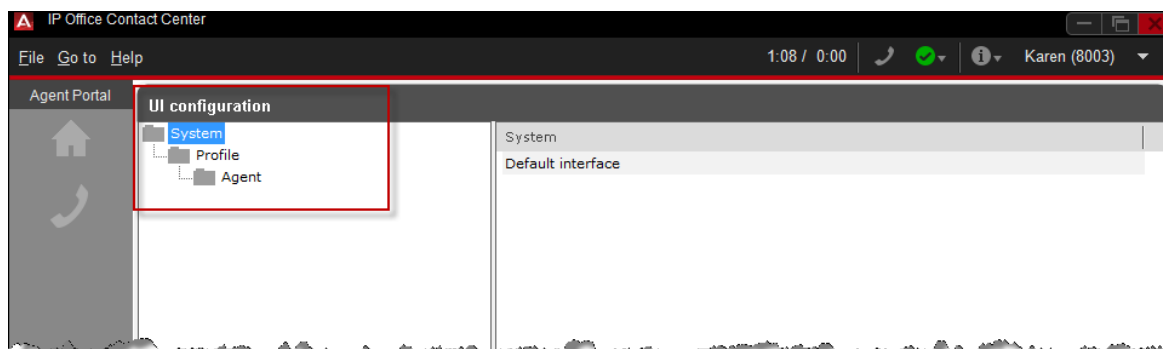
1. Select **Go to** followed **UI config**



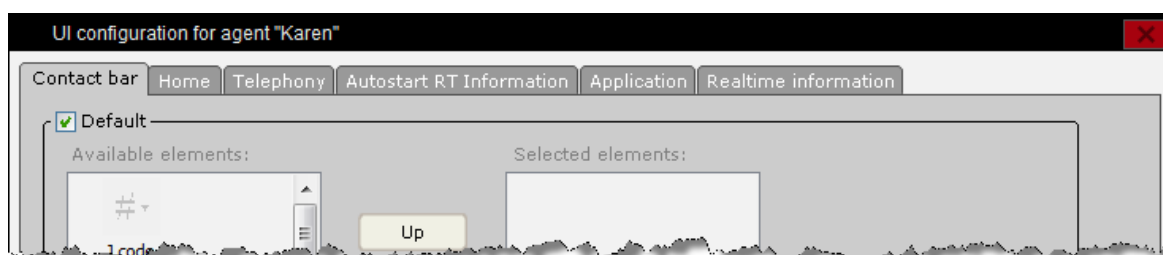
2. The UI Configuration screen is displayed.



Configuration changes can be made to System files, configured Profiles or for individual agents.



The User Interface Configuration screen can be used to select and edit the Contact Bar, select the Home View, the Telephony File, Autostart RT Information, select the Active View when the user interface is launched and the color format of Real Time information.



In the following examples, the Contact Bar will be edited to utilize the Silent Monitoring and Supervisor Emergency elements in the Agent and Supervisor interface.

**Note:** Only the Silent Monitoring and Supervisor Emergency elements are supported. I.e. The Supervisor Assistance element is not supported on IP Office Contact Center.

## Configuring an Agent's Contact Bar.

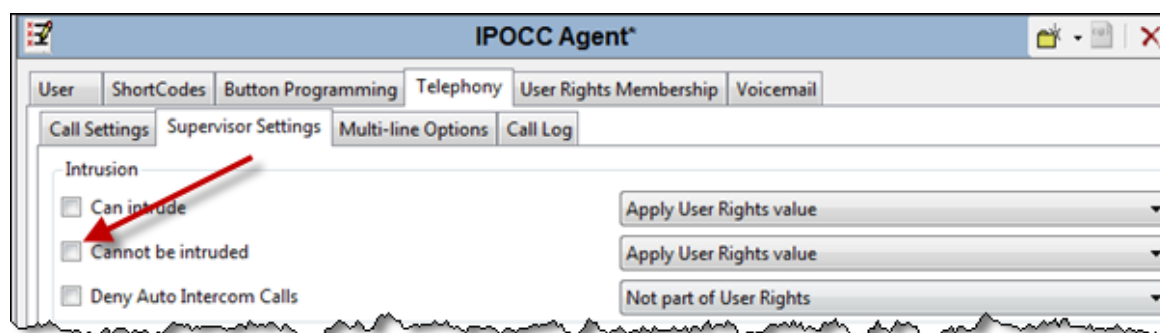
### Silent monitoring

The Silent Monitoring element authorizes a Supervisor to silent monitor configured agents from a selected group.

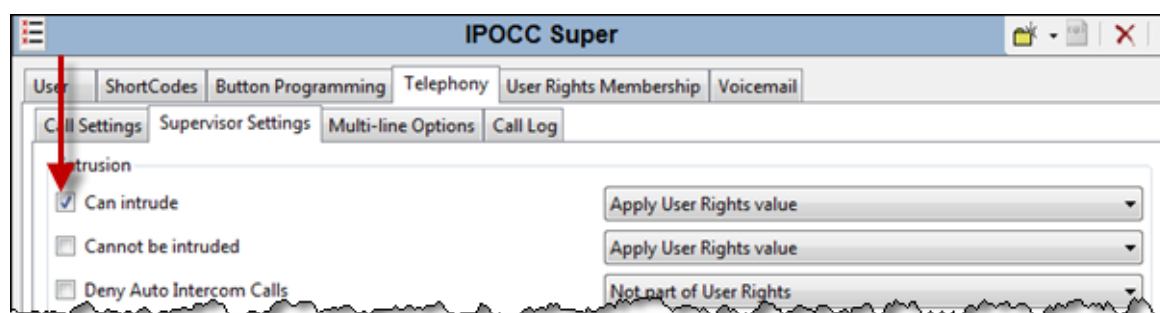
There are number settings that require configuration in the IP Office that will allow the Supervisor to monitor the Agent whilst on a call.

The required Agent's IP Office profile must have the **Cannot be Intruded** option deselected. This can be assigned via an Agents User Right's profile or to individual agents.

1. Login to IP Office Manager. Navigate to the agent profile or the User Rights Profile to be utilized and deselect the **Cannot be Intruded** check box.



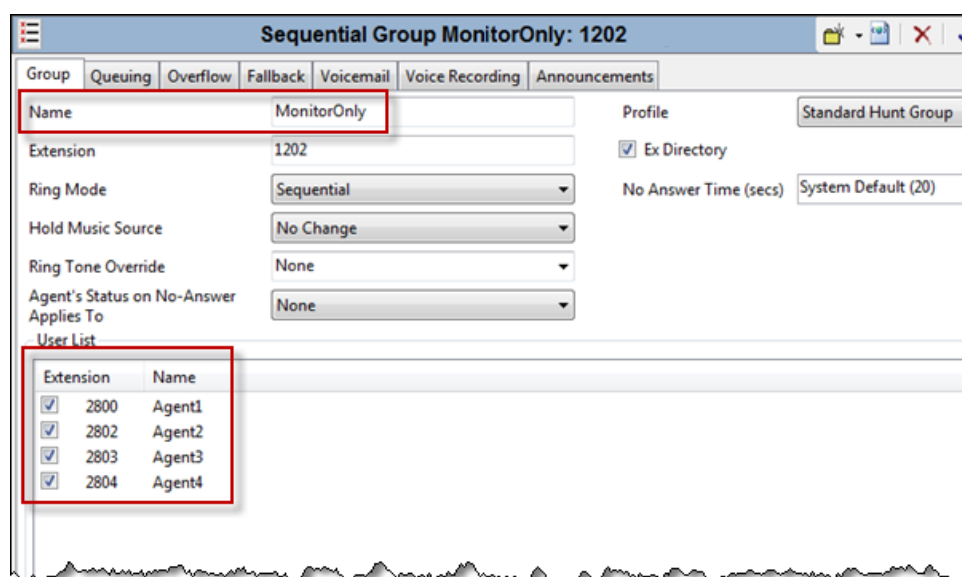
2. The Supervisor's IP Office profile must have the **Can Intrude** check box selected.



**Note:** Check the **Cannot be intruded** option to prevent the supervisor him/herself from being silently monitored.

3. The IP Office uses **Monitor Group** to allow the Supervisor to choose which Agents they are allowed to monitor. Therefore to use this feature with IP Office Contact Center, a hunt group can be created within IP Office Manager that will contain all of the agents to be monitored.

**Note:** Ensure that the supervisor's extension is also included in the Group's User List



4. If you use the option for **Ex Directory** option, this hunt group will not appear in the contacts button on the agent's handset.

**Sequential Group MonitorOnly: 1202**

Group: Queuing | Overflow | Fallback | Voicemail | Voice Recording | Announcements

Name: MonitorOnly | Profile: Standard Hunt Group

Extension: 1202 | ☒ Ex Directory

Ring Mode: Sequential | No Answer Time (secs): System Default (20)

Hold Music Source: No Change

Ring Tone Override: None

Agent's Status on No-Answer Applies To: None

User List

Extension	Name
<input checked="" type="checkbox"/> 2800	Agent1
<input checked="" type="checkbox"/> 2802	Agent2
<input checked="" type="checkbox"/> 2803	Agent3
<input checked="" type="checkbox"/> 2804	Agent4

**Note:** Ensure that the supervisor's extension is also included in the Group's User List

5. Now that all of the Agents are assigned to the hunt group, the supervisor(s) profile has to be configured on the IP Office, to be permitted to monitor that hunt group. This is configured on each supervisor's IP Office profile by selecting the **Monitor Group** drop down list and selecting the configured Hunt Group, in this example the hunt group named **Monitor Only**.

**Supervisor: 2900**

User | Voicemail | DND | ShortCodes | Source Numbers | Telephony | Forwarding | Dial In | Voice Recording | Button Programming

Call Settings | Supervisor Settings | Multi-line Options | Call Log | TUI

Login Code: \*\*\*\*\* | ☐ Force Login

Login Idle Period (secs): | ☐

Monitor Group: MonitorOnly | ☐

Coverage Group: <None> | ☐

Status on No-Answer: Logged On (No change) | ☐

Reset Longest Idle Time: ☒ All Calls | ☐ Can Intrude

☐ External Incoming | ☐ Cannot be Intruded

After Call Work Time (secs): System Default (10) | ☐ Can Trace Calls

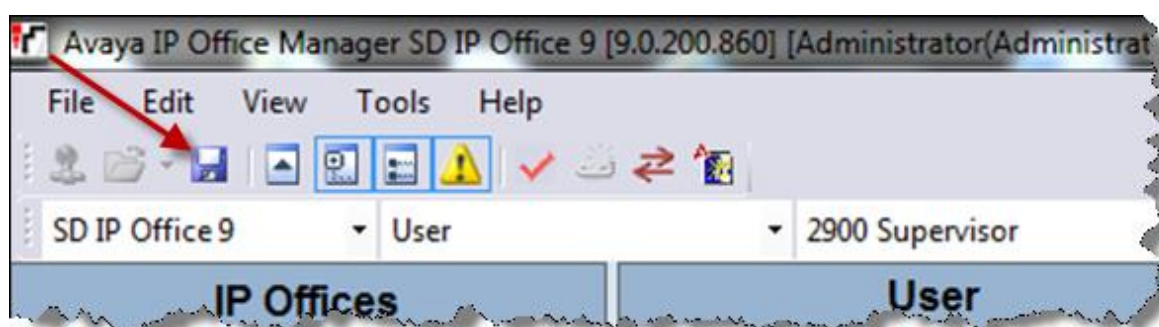
☐ CCR Agent

☐ Automatic After Call Work

☐ Deny Auto Intercom Calls

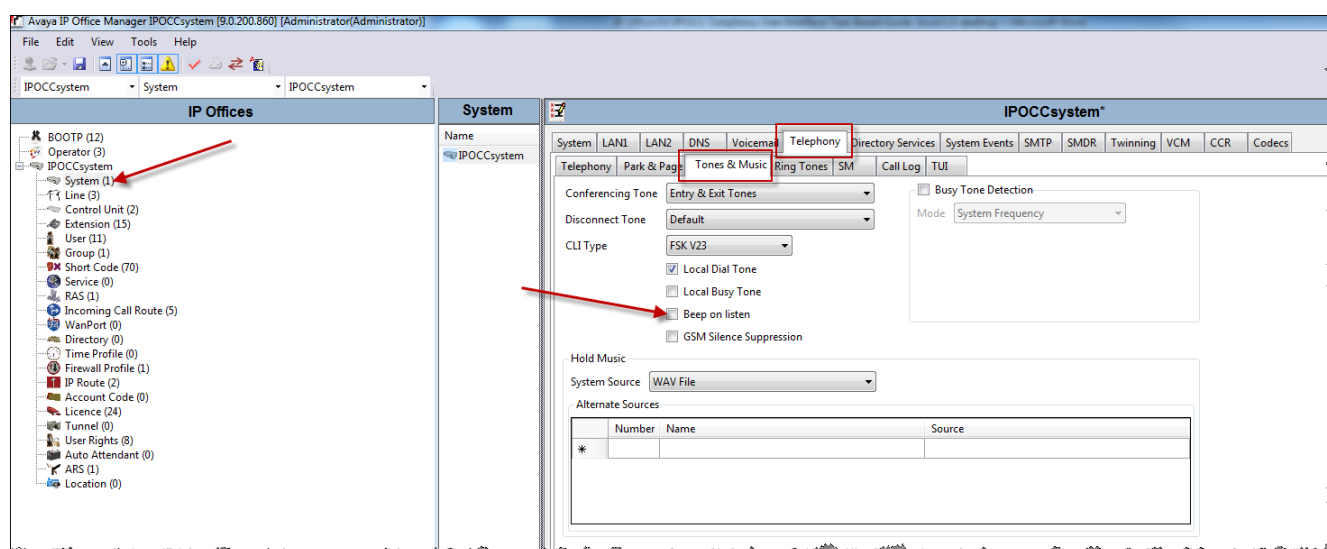
- A. This is a previously configured Hunt Group that contains the agents to be monitored.

6. Remember to save the configuration changes on the IP Office.



**Note:** Any IP Office extension that an IP Office Contact Center User may sign onto would require the above IP Office configuration, if monitoring is to take place from these extensions.

7. By default, the IP Office will produce a Tone at the point that an agent is monitored (the **Beep on listen** option).
8. This can be disabled in IP Office Manager by selecting **System**, **Telephony** followed by the **Tones & Music** tab and then deselecting the **Beep on listen** option.



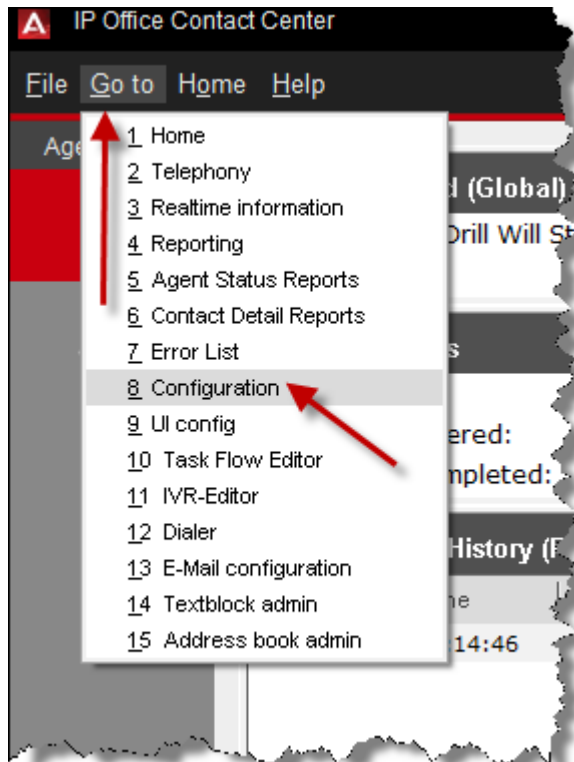
9. Save the configuration changes.

**Note:** this is a system wide setting for all Users of the IP Office.

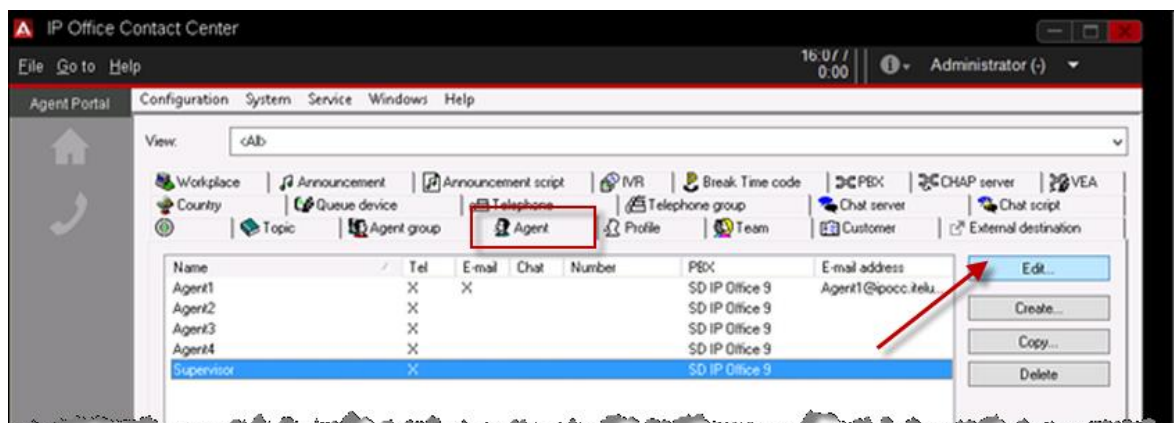
## Silent monitoring – Continued

Privileges will be granted to the Supervisor to allow them to use the **Silent Monitoring** element.

1. Select **Goto** followed by **Configuration**.



2. Select the **Agent** tab. Select the **Supervisor** and click **Edit**.



3. The Supervisors details are displayed, click the **Privileges** button.



[Agent] Supervisor - Edit

General | Telephony

System name:

Login name:

☐ Autom. sign on through Windows user account

Username:

Domain/computer:

Alias:

Language:

Last name:

First name:

Employee ID:

Cost center:

Title

☐ Ms.

☐ Mr.

Privileges...

Predefined profile:

Address book:

Task types

☒ Telephony

☐ E-mail

☐ Chat

Password...

2nd password...

Variables...

Skills...

Availability...

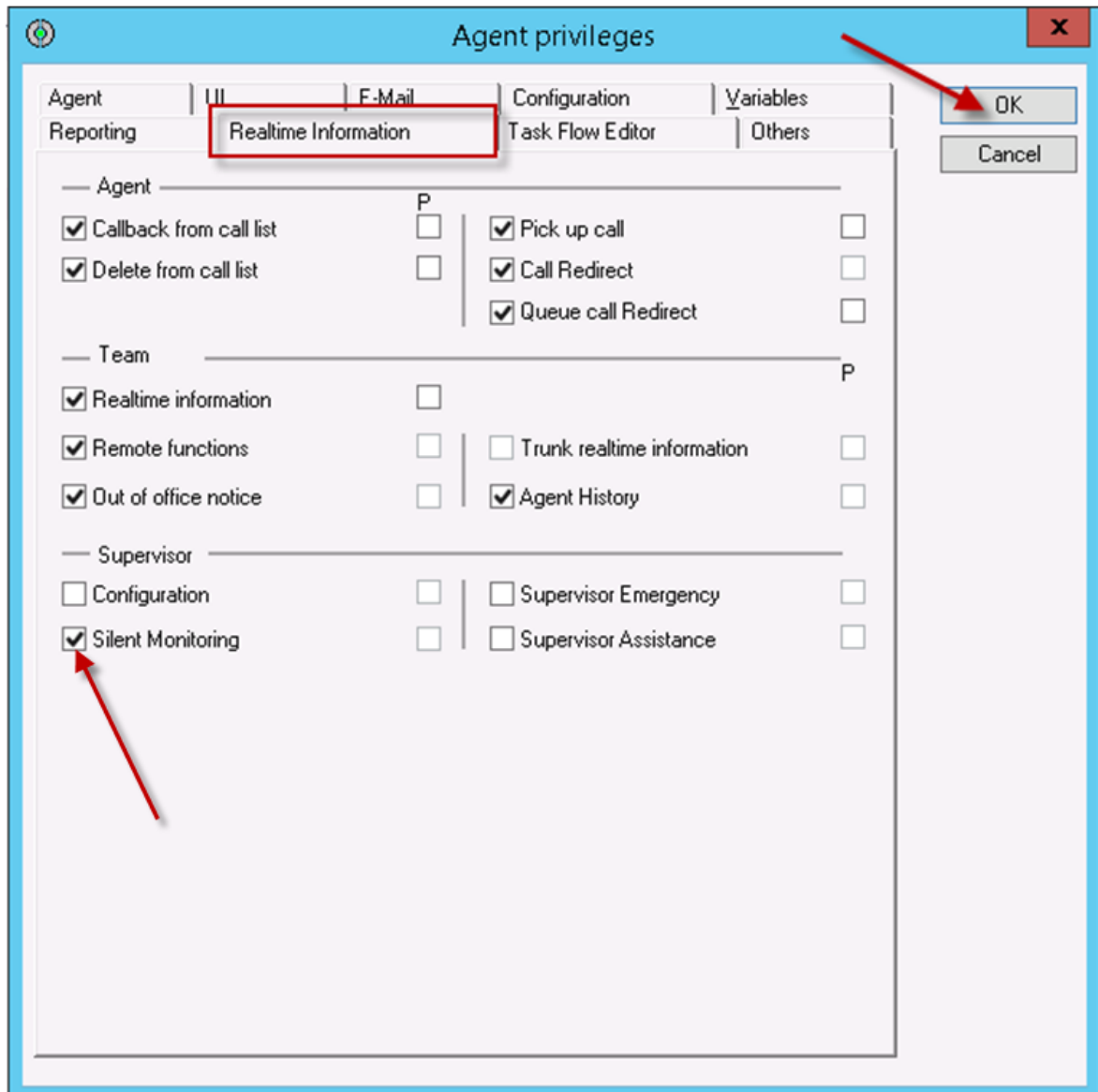
Authorization...

OK

Cancel

4. Select the **Realtime Information** tab followed by the **Silent Monitoring Assistance** privilege and then click the **OK** button.





5. The Privilege has now been applied, click the **OK** button to close.

The screenshot shows the '[Agent] Supervisor - Edit' dialog box with the 'Telephony' tab active. The 'Task types' section has 'Telephony' checked. The 'OK' button is highlighted with a red arrow.

**General** | **Telephony**

System name: Supervisor  
Login name: Supervisor

☐ Autom. sign on through Windows user account

Username:   
Domain/computer:   
Alias:   
Language: <System language>

Last name: Supervisor  
First name:   
Employee ID:   
Cost center:

Predefined profile: <None> ...

Address book: Standard

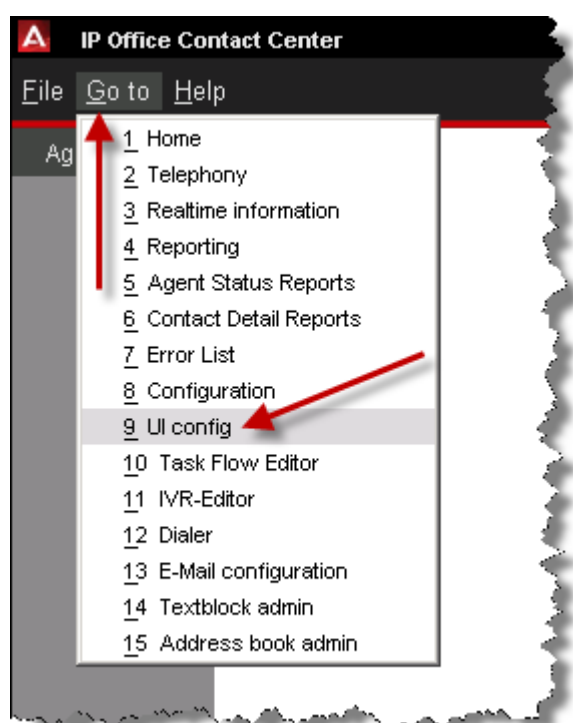
**Task types**  
☒ Telephony  
☐ E-mail  
☐ Chat

**Title**  
☐ Ms.  
☐ Mr.

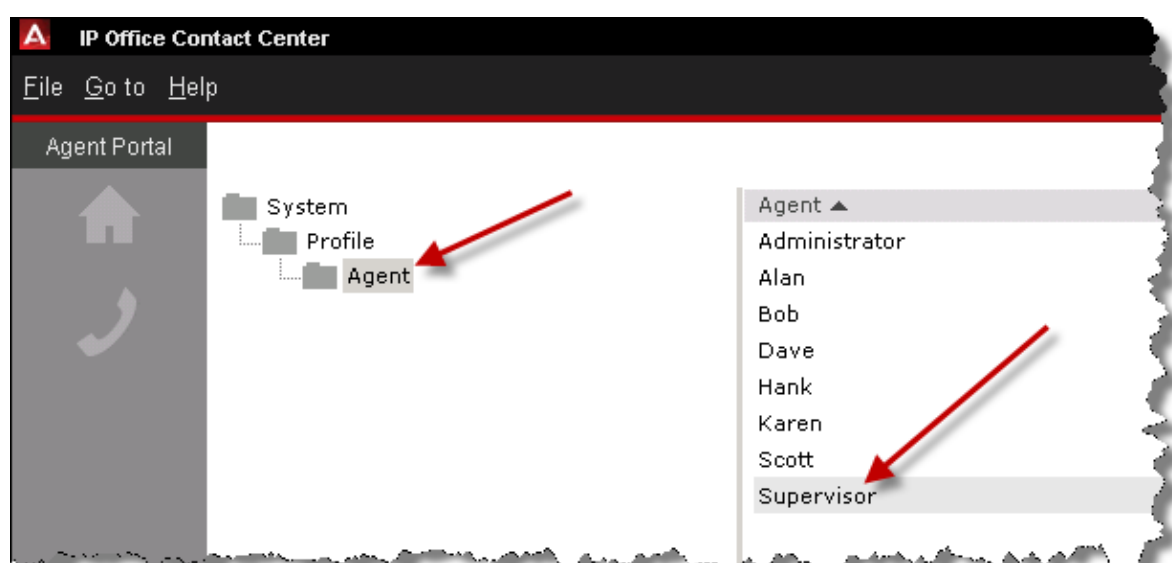
Buttons: Password..., 2nd password..., Variables..., Skills..., Availability..., Privileges..., Authorization...

Buttons: OK, Cancel

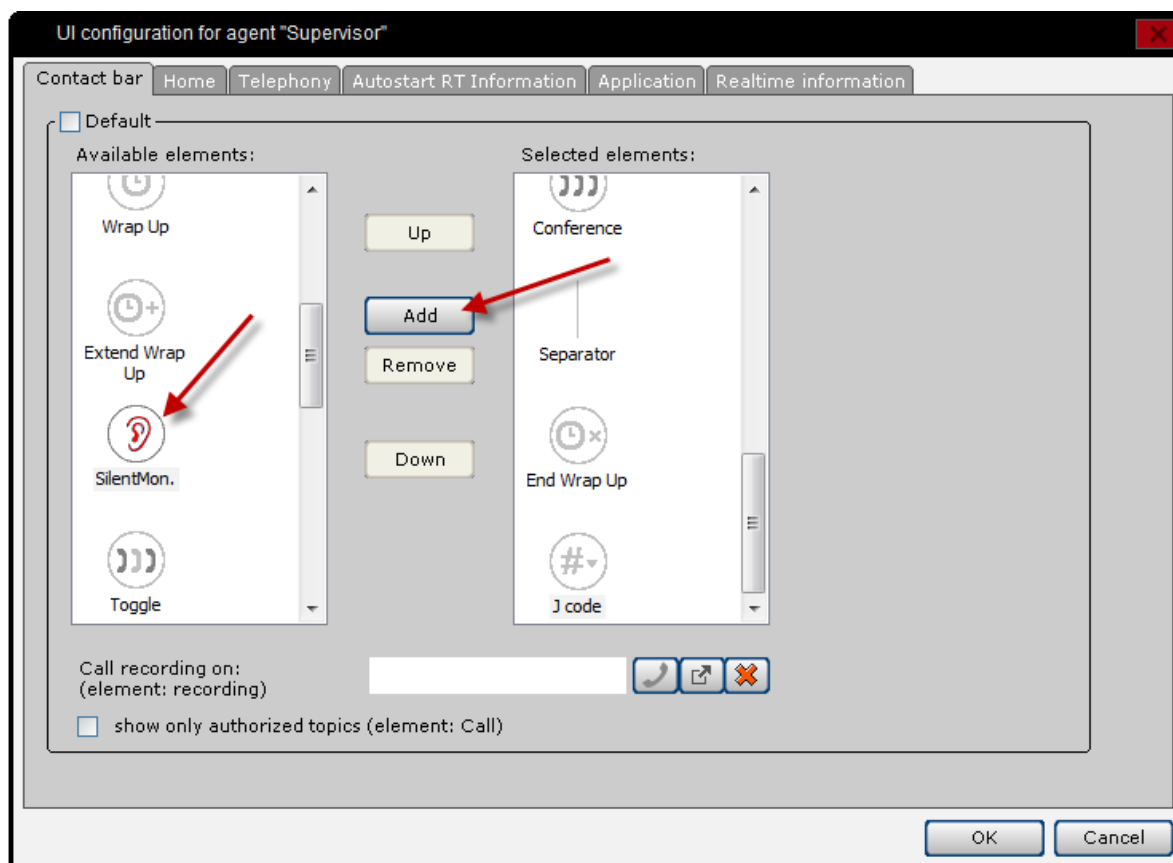
6. The **Silent Monitoring** option can now be added to the Supervisors Contact Bar.
7. Select **Goto UI Configuration**.



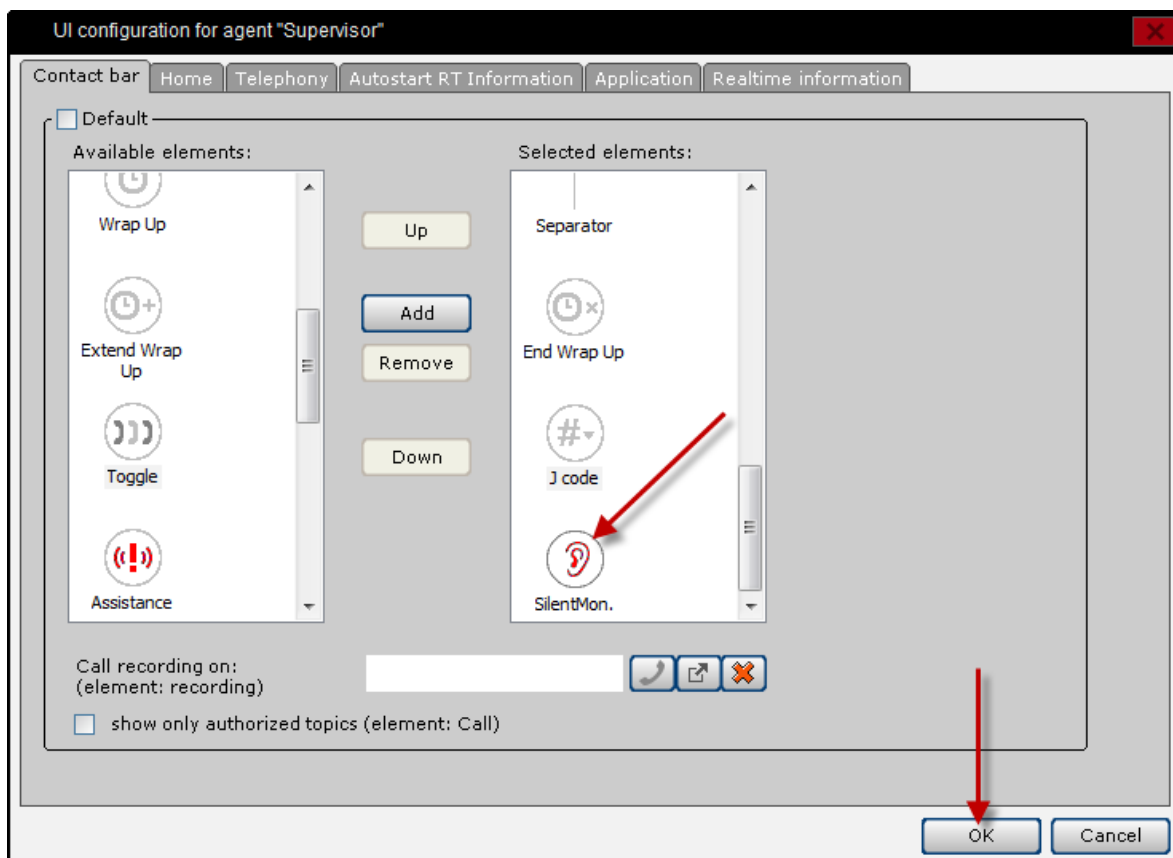
8. Click the **Agent** folder and double click on the required **Supervisor** profile.



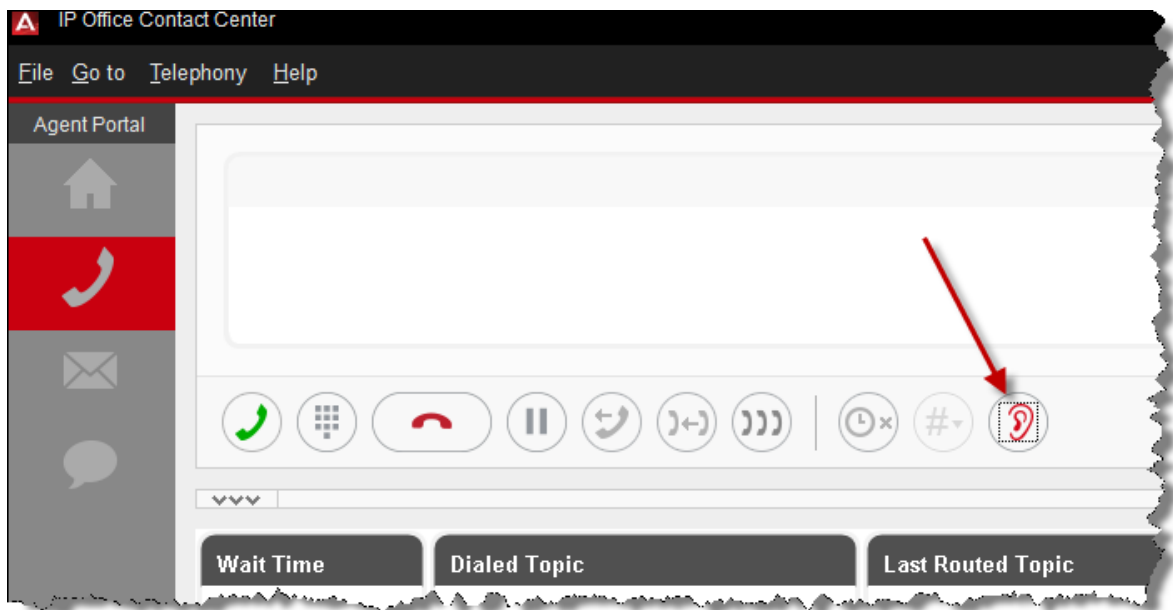
9. Select the **SilentMon.** element then click the **Add** button.



10. The **Silent Monitor** icon is displayed click the **OK** button.

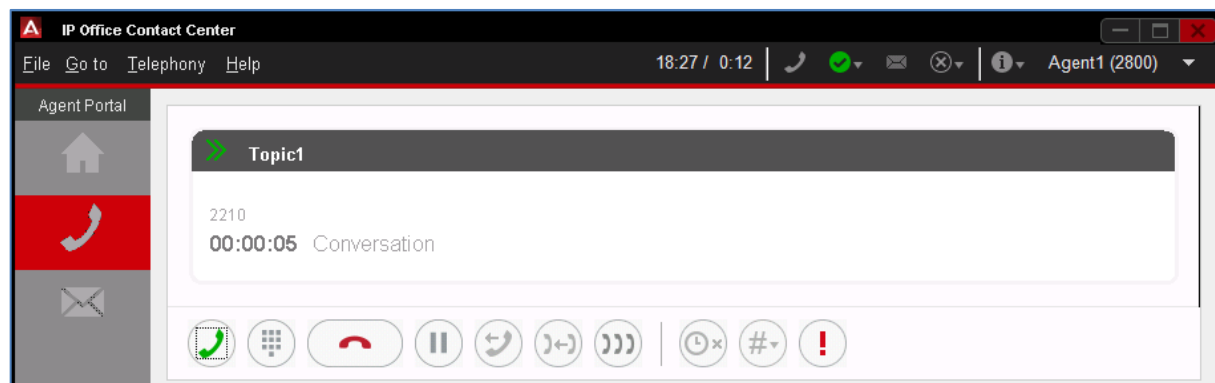


11. The button will be added to the Supervisors Contact bar.

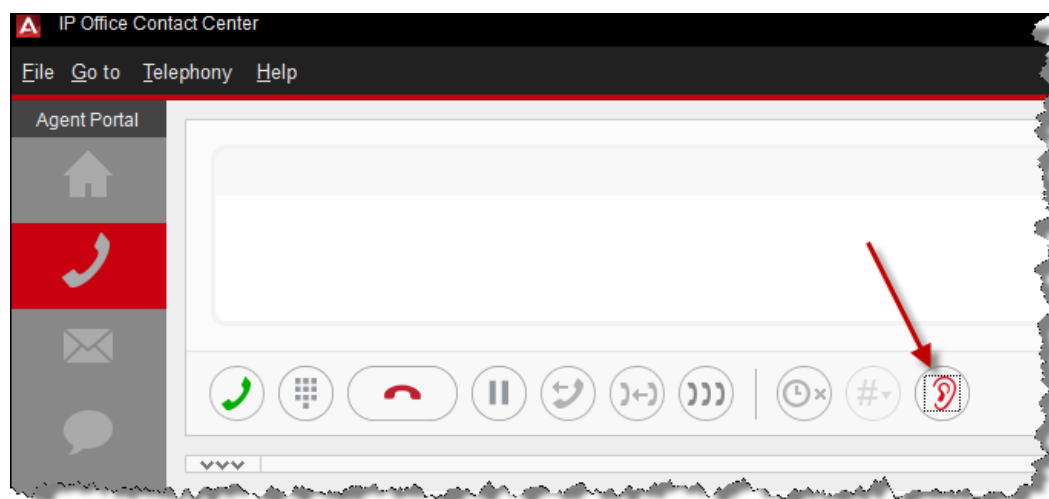


An example of the Supervisor Monitoring utility, in use.

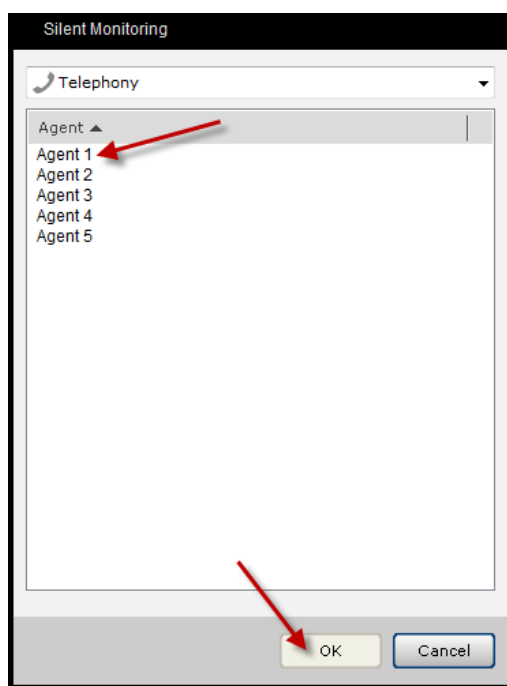
1. An agent is on a call.



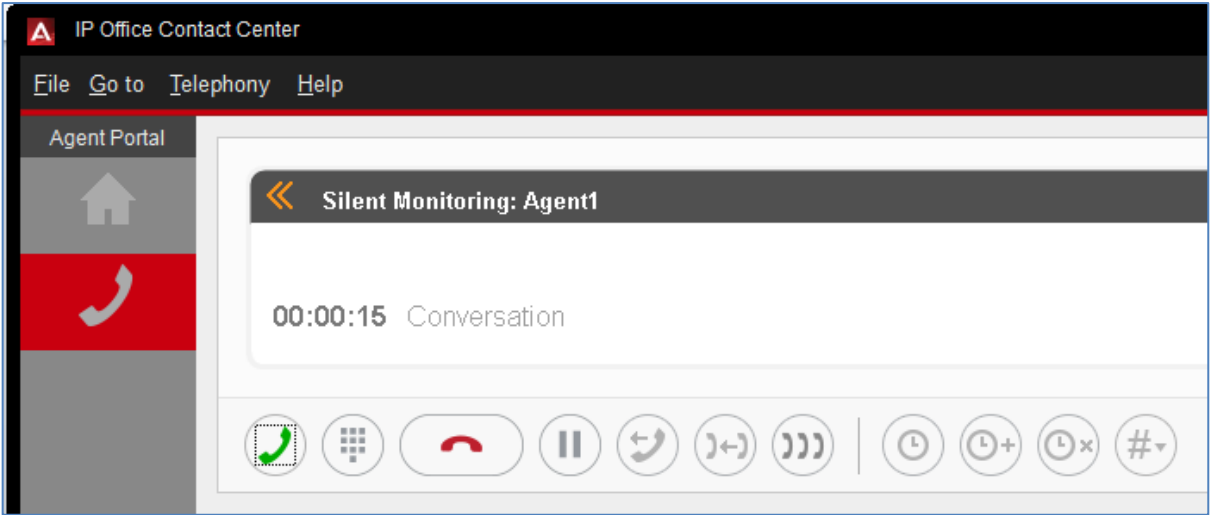
2. The Supervisor clicks the **Silent Monitoring** button.



3. The Supervisor can select the agent to be monitored from the **Silent Monitoring** screen. Select the required agent and click the **OK** button.



4. The Supervisors interface indicates that a Silent Monitoring session is in progress with Agent1.



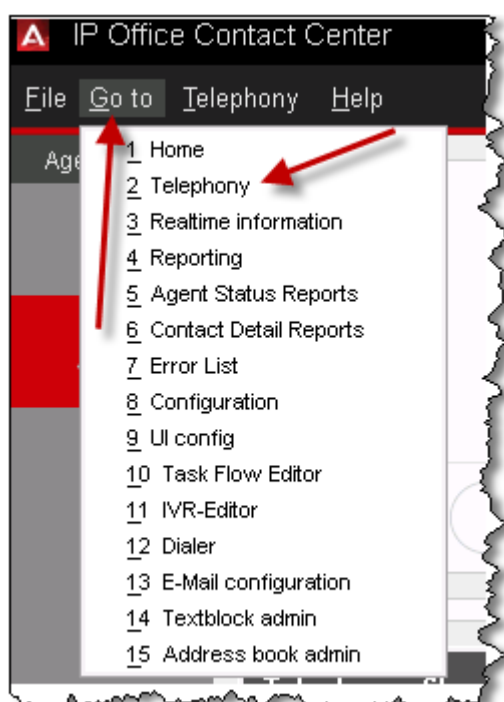
## Supervisor Emergency

This element allows the Agents to contact a Supervisor via their IP Office Contact Center interface to ask for assistance whilst on a call with a customer. If the Supervisor accepts the request, the Supervisor joins the agents call.

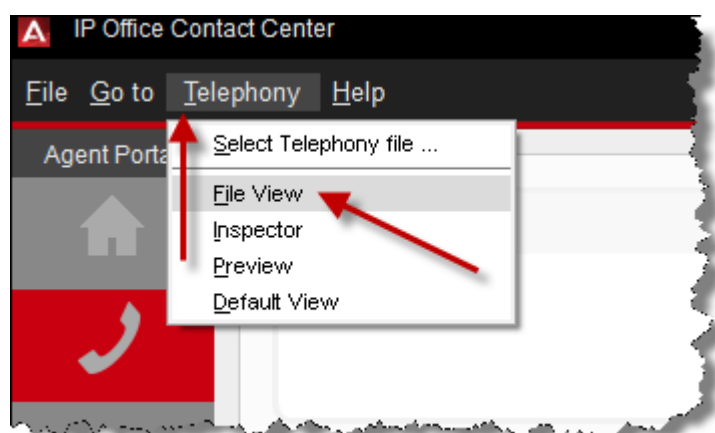
There are two parts to this process, Part 1 Supervisor configuration and Part 2 Agent configuration.

### Part 1 - Supervisor Configuration

1. Select **Go to** followed by **Telephony**.



2. Select **Telephony** followed by **File View**.

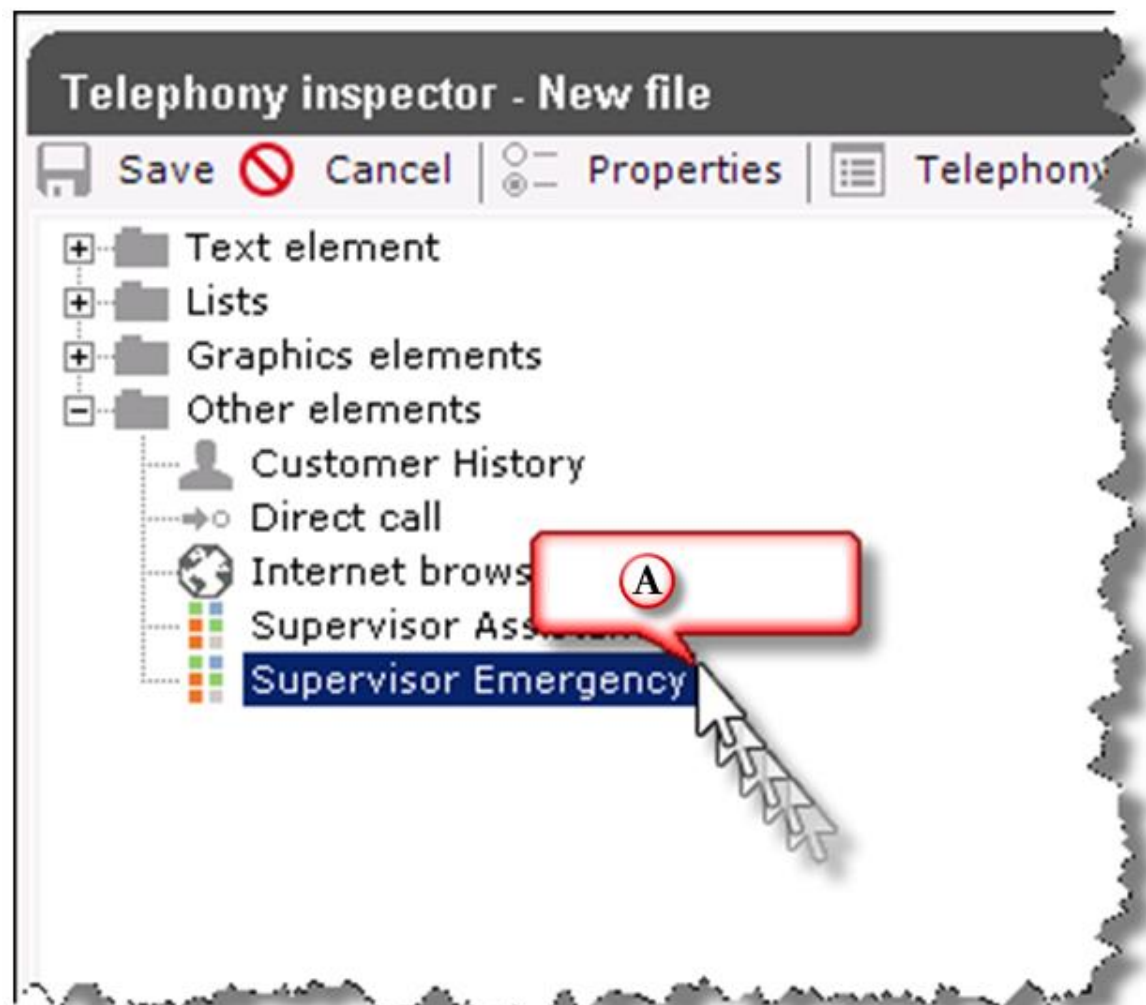




3. Select the duplicated file to be utilized, in this example a file called **Supervisor GUI\_en** has been selected. Click the **Edit** button.

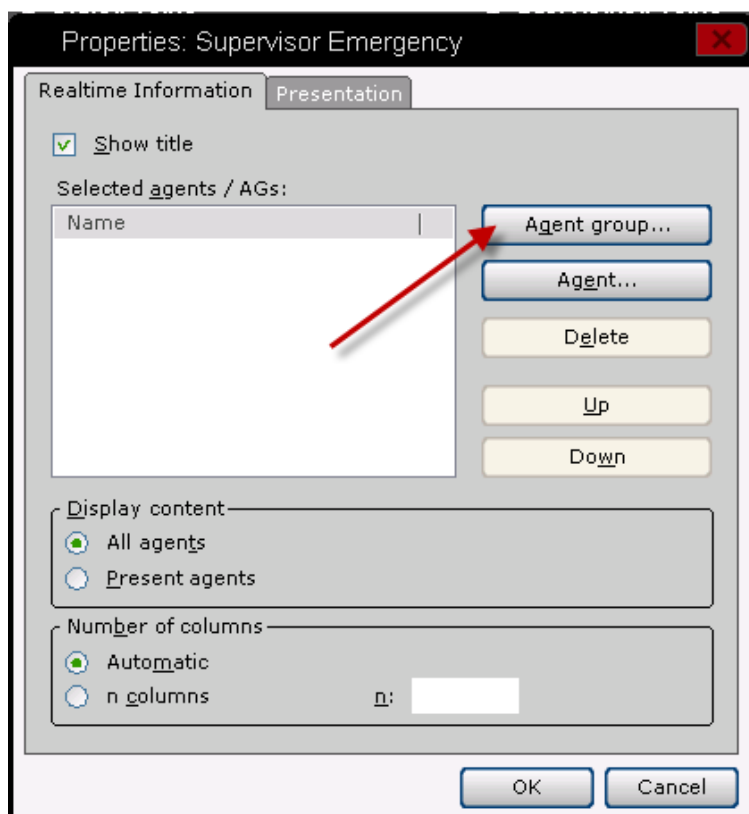


4. Select the **Supervisor Emergency** element and drag it onto the Working Area.

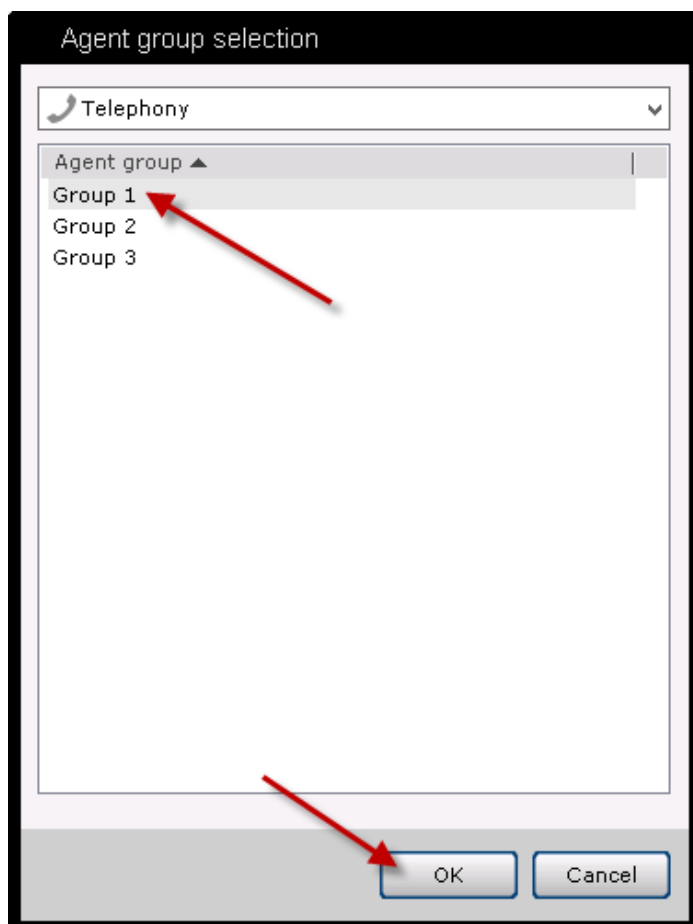


A. Click and drag.

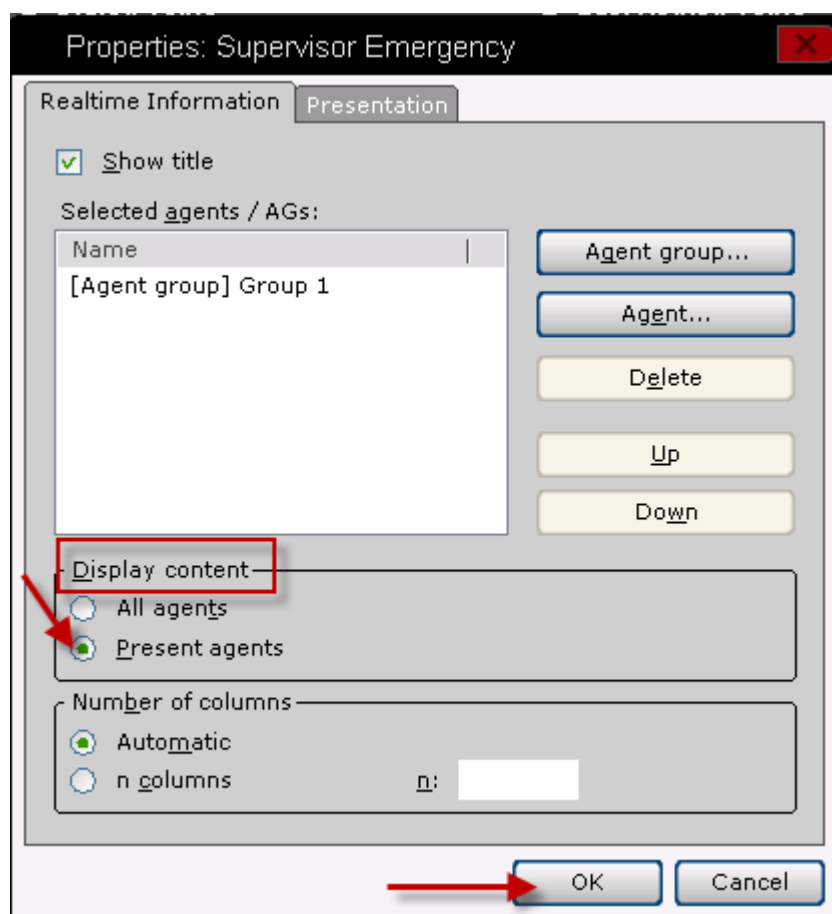
5. Click the **Agent Group** button, and select the required group.



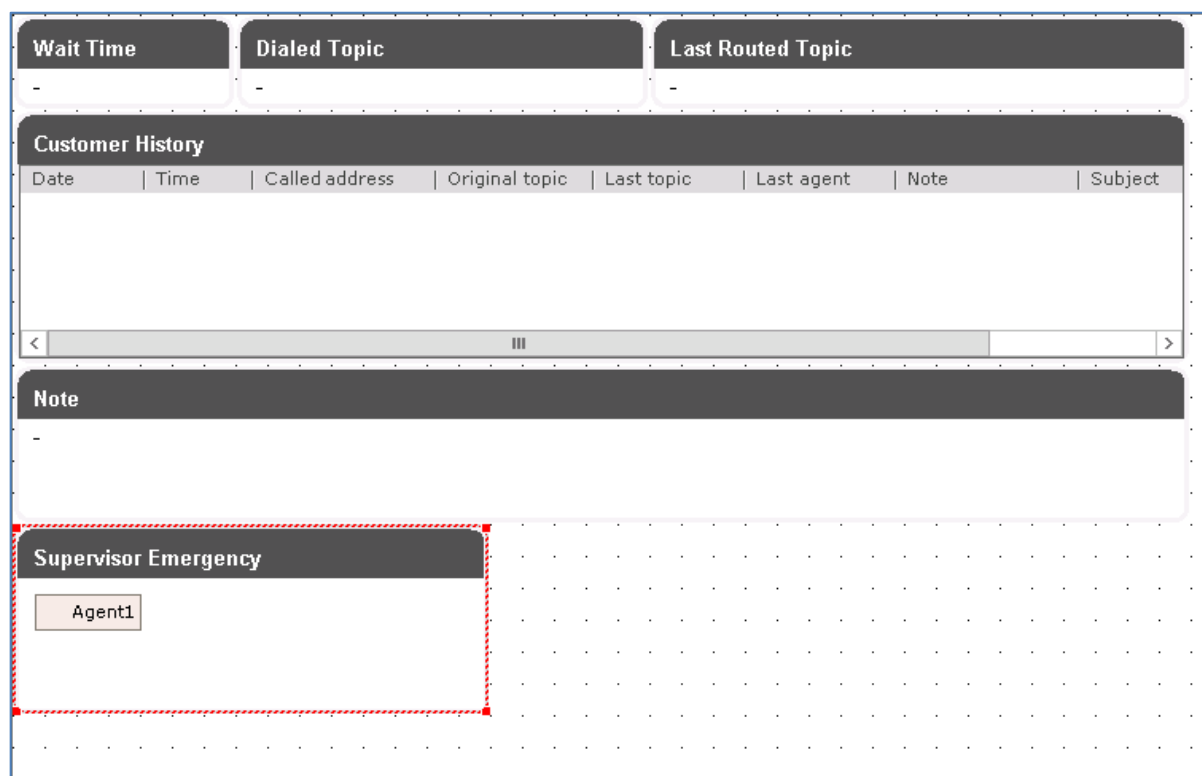
6. In this example Agent Group 1 has been selected. Click the **OK** button.



7. The Agent group is now displayed. Change the **Display Content** option to **Present agents** and click the **OK** button.



8. Select the **Supervisor Emergency** element is displayed.

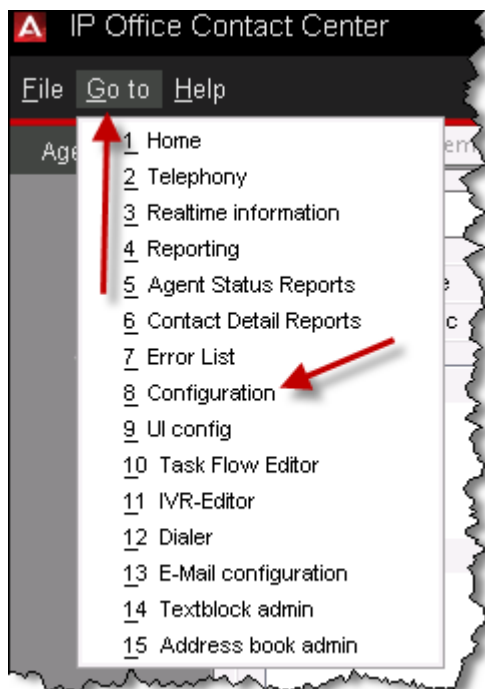


9. Click the **Save** button.

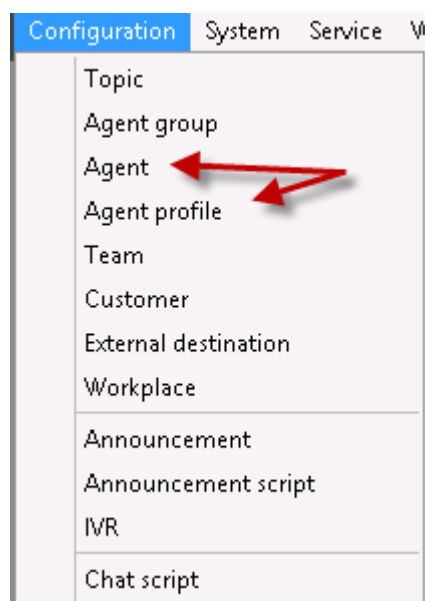


10. The Privileges for the Supervisor and the Agent should be checked to ensure that they are allowed to use the function.

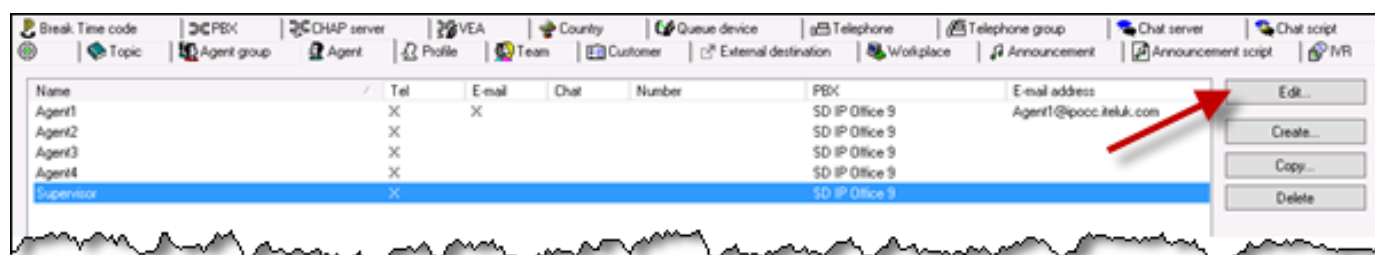
11. Click **Go to** followed by **Configuration**.



12. Select **Configuration** followed by **Agent** or **Agent profile**, if profiles are used.



13. Select the Agent or Supervisor then click the **Edit** button.



14. Click the **Privileges** button.

The screenshot shows the '[Agent] Supervisor - Edit' dialog box with the 'Telephony' tab active. The 'Task types' section has 'Telephony' checked. A red arrow points from the 'Title' section to the 'Privileges...' button.

**General** | **Telephony**

System name: Supervisor  
Login name: Supervisor

☐ Autom. sign on through Windows user account

Username:   
Domain/computer:   
Alias:   
Language: <System language>

Last name: Supervisor  
First name:   
Employee ID:   
Cost center:

Predefined profile: <None> ...

Address book: Standard

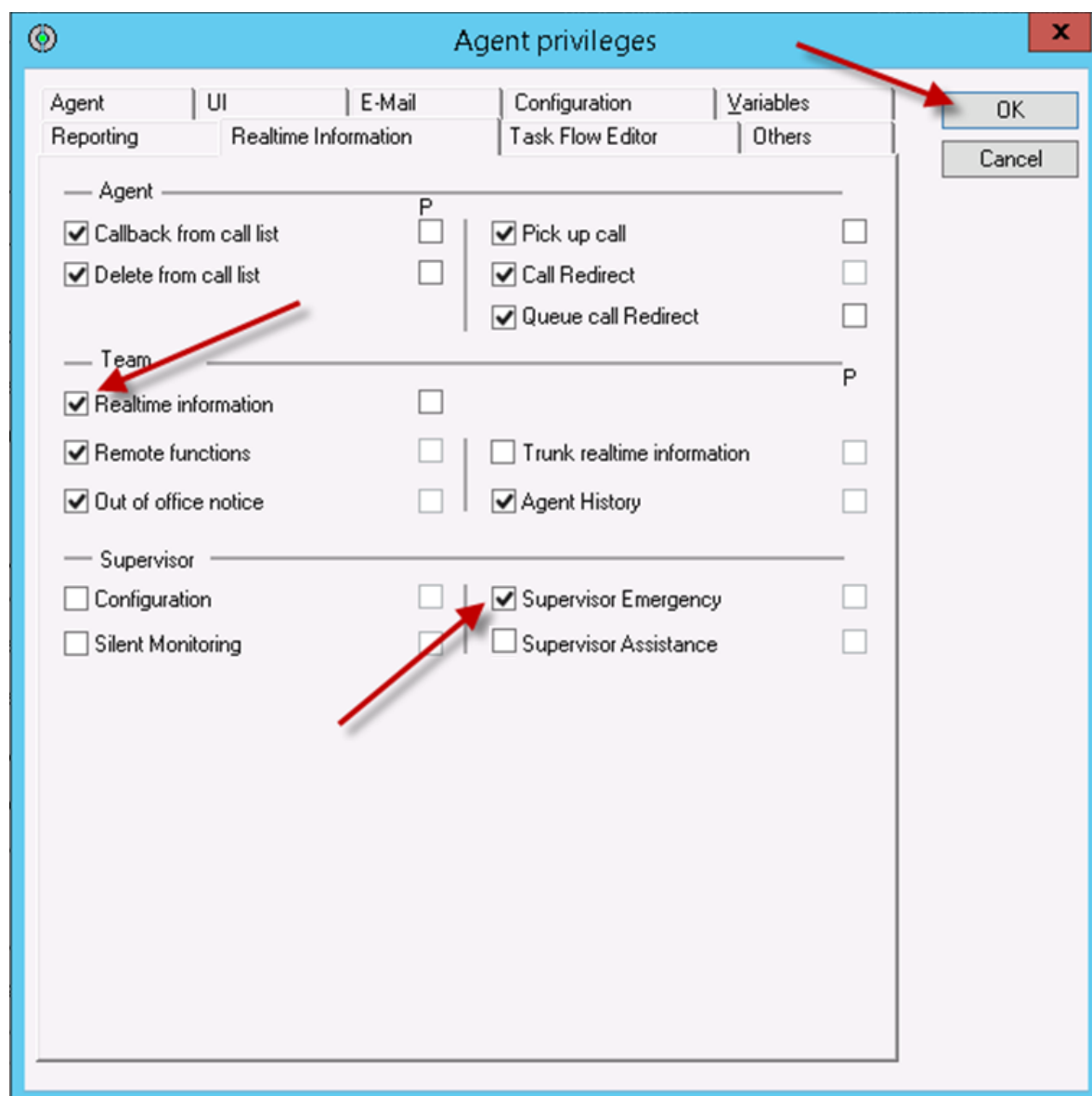
**Task types**  
☒ Telephony  
☐ E-mail  
☐ Chat

**Title**  
☐ Ms.  
☐ Mr.

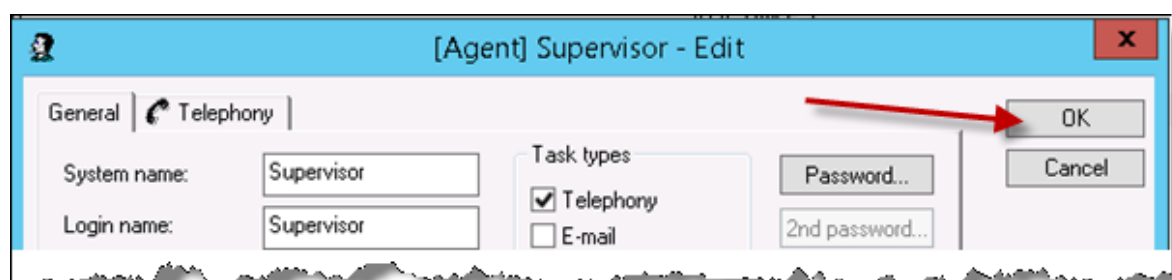
Buttons: Password..., 2nd password..., Variables..., Skills..., Availability..., Privileges..., Authorization...

Buttons: OK, Cancel

15. Select the **Realtime Information** and **Supervisor Emergency** check boxes. Then click the **OK** button.



16. Choose the **OK** button to close.

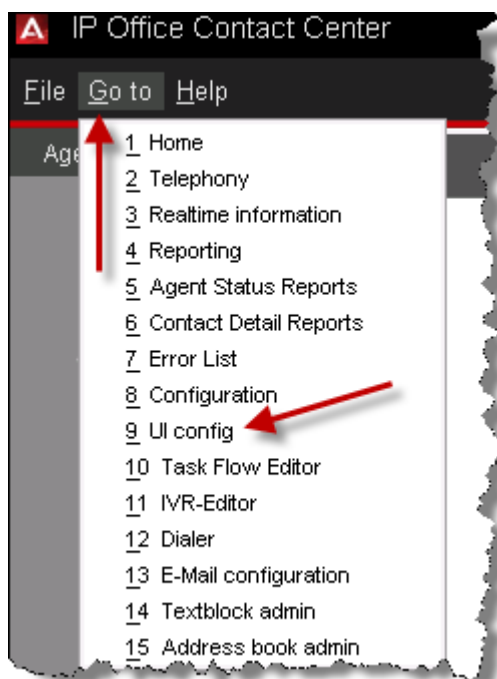


17. This process should be repeated for all Supervisors and all Agents that are to use this feature.

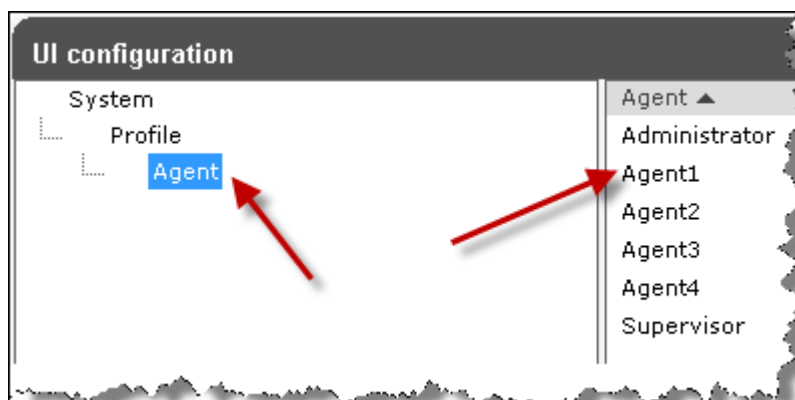


## Part 2 - Agent Configuration

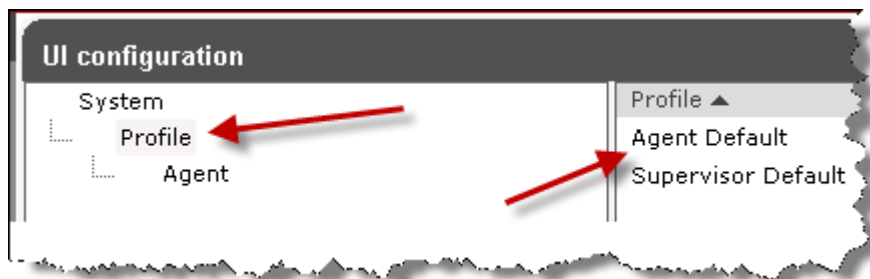
1. Select **Go to** followed by **UI config**.



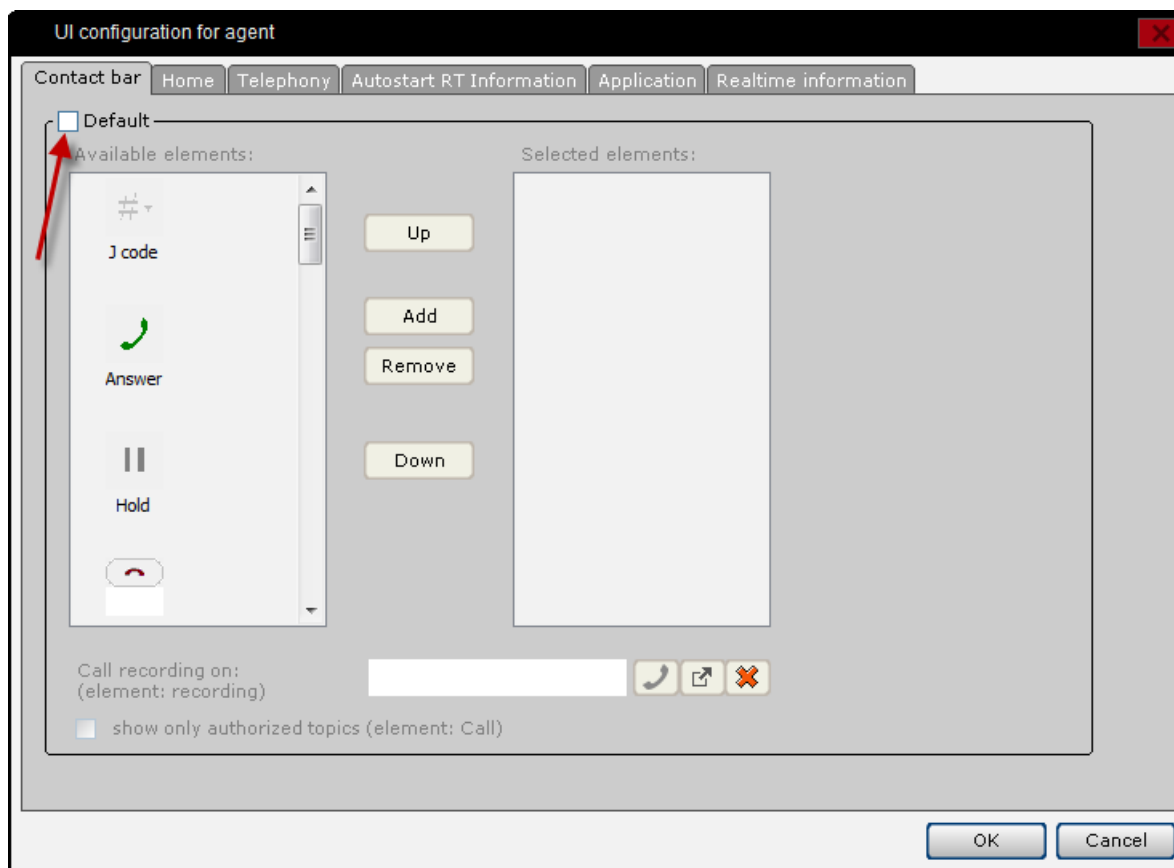
2. Select the Agent to which the changes will be made.



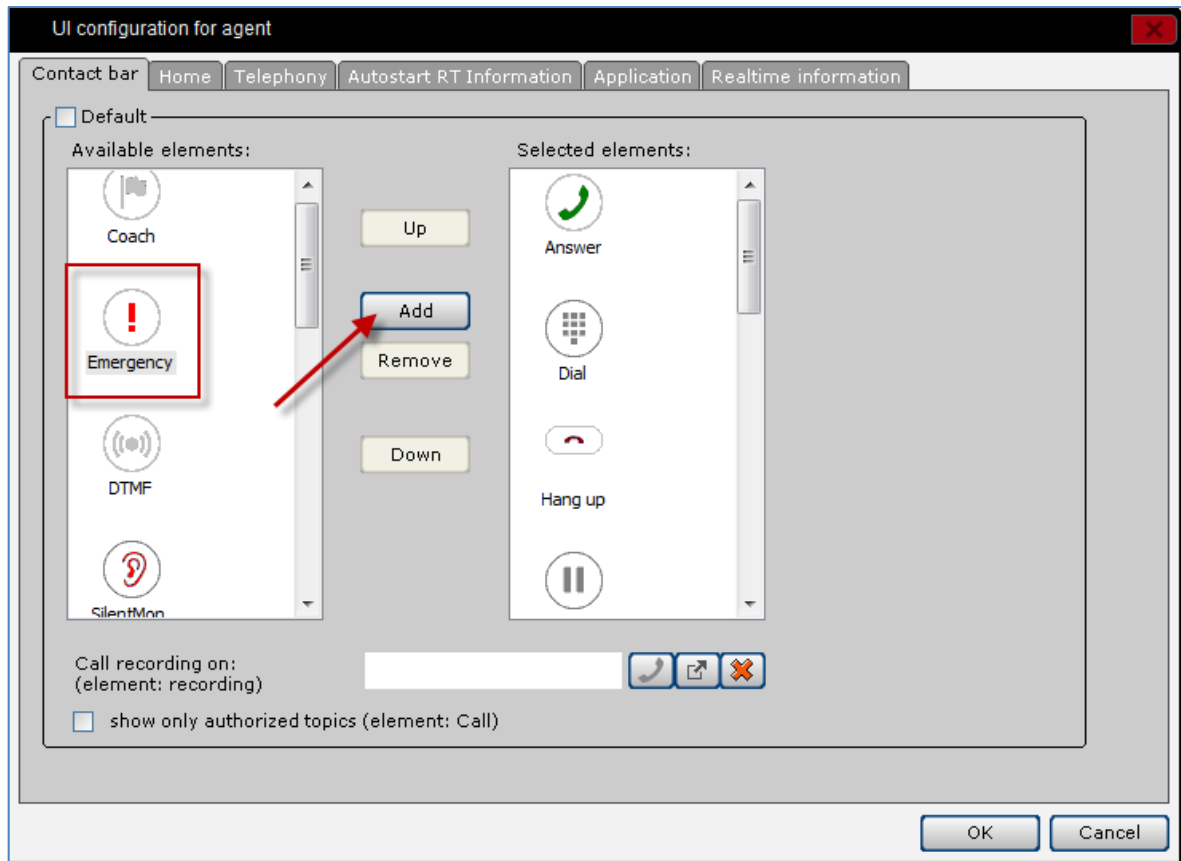
3. If you are using profiles select which profile you wish to change.



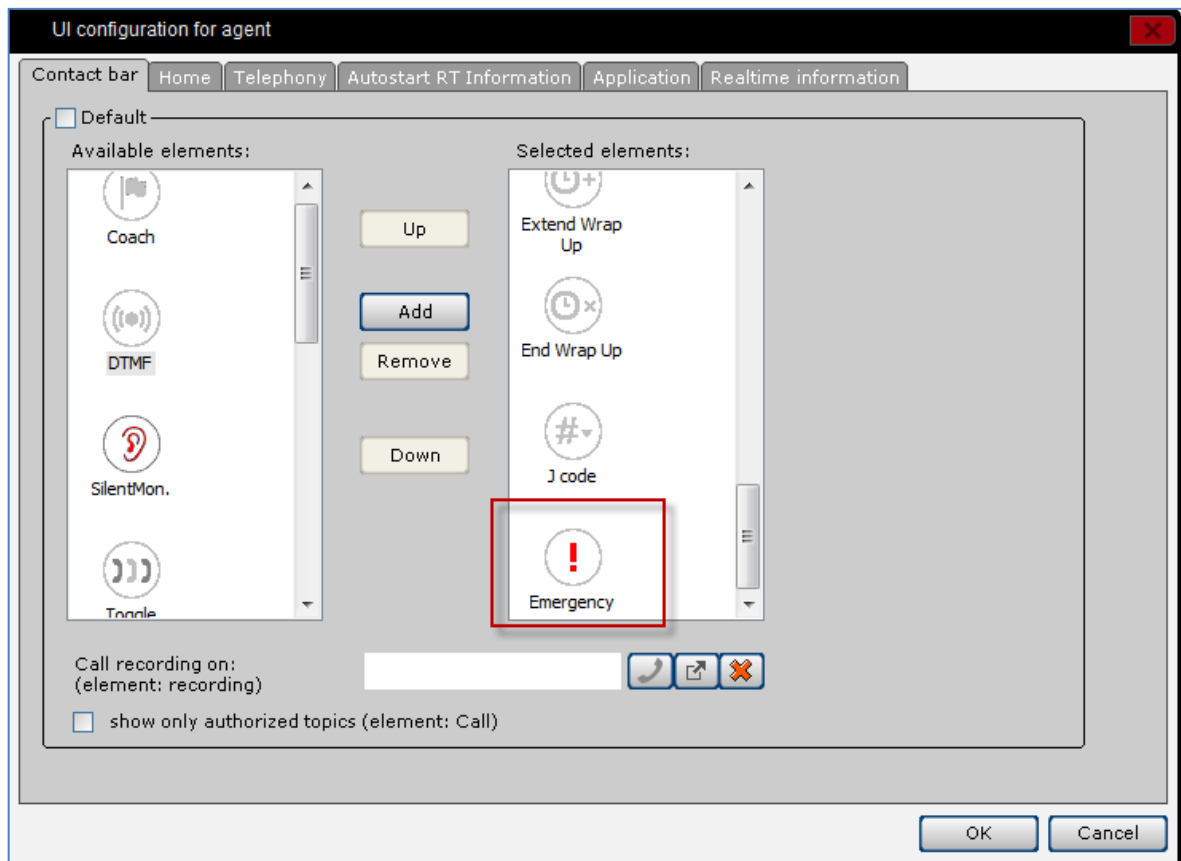
4. Deselect the **Default** check box.



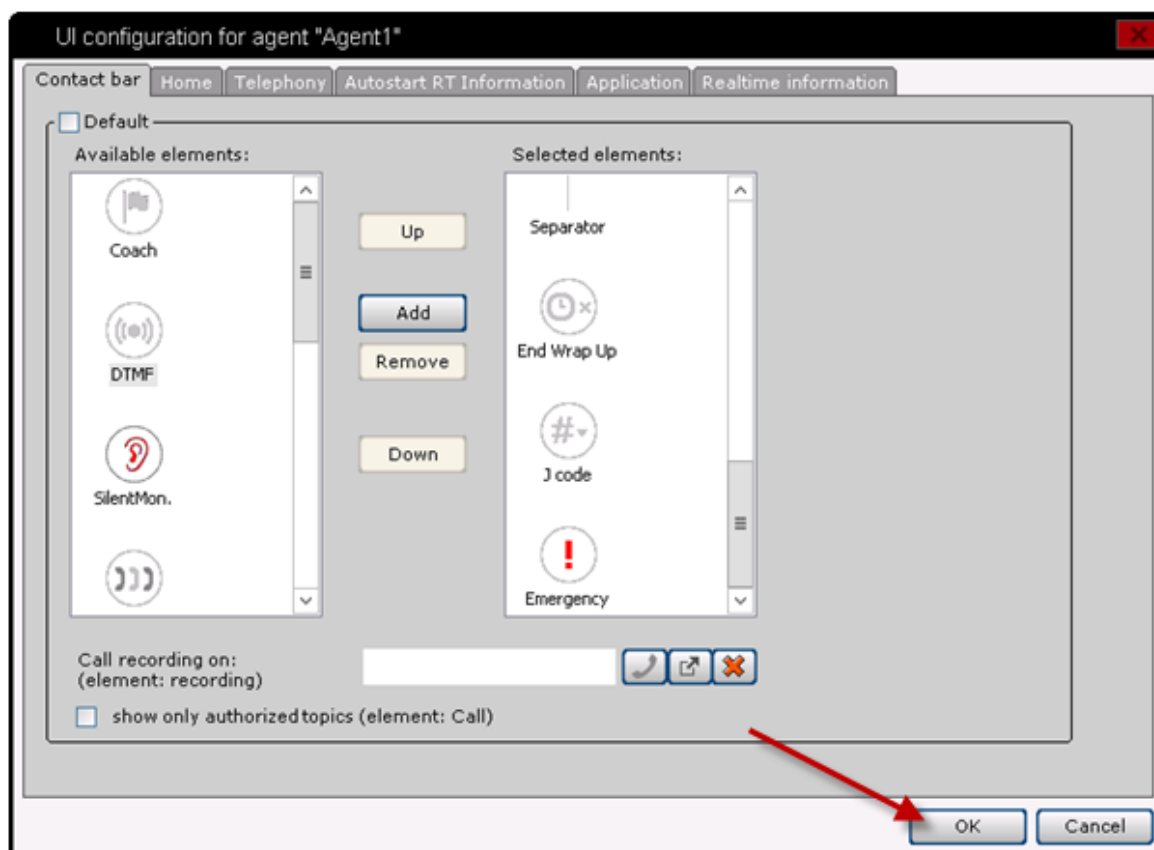
5. Select the **Emergency** and the **Silent Monitoring** element, click the **Add** button.



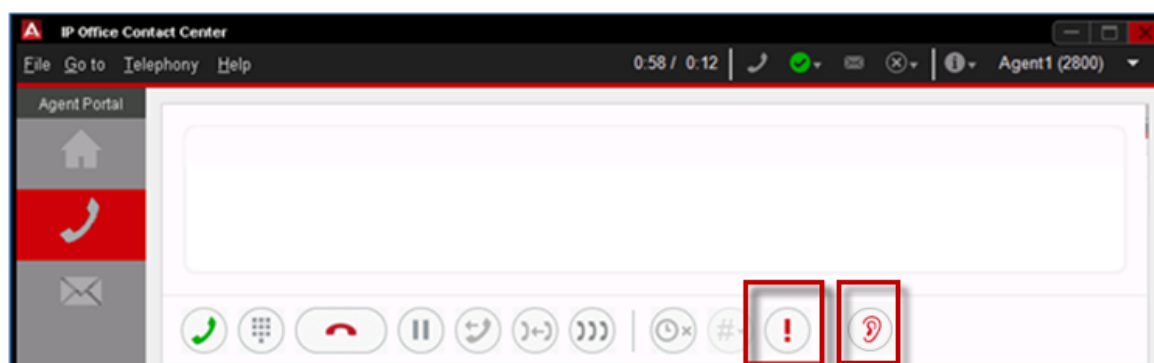
6. The Emergency element is moved to the **Selected elements** panel.



7. Click the **OK** button.



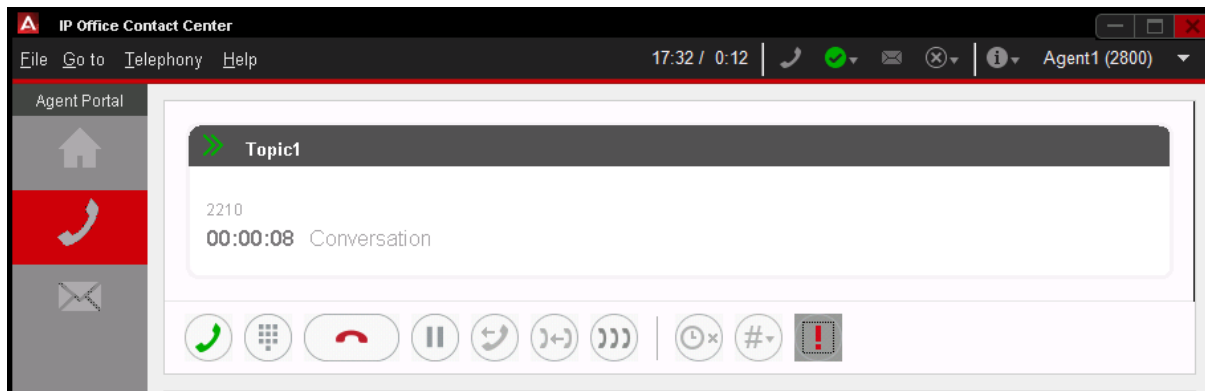
8. When the agent next logs in to the IP Office Contact Center User interface, the new buttons will be visible.



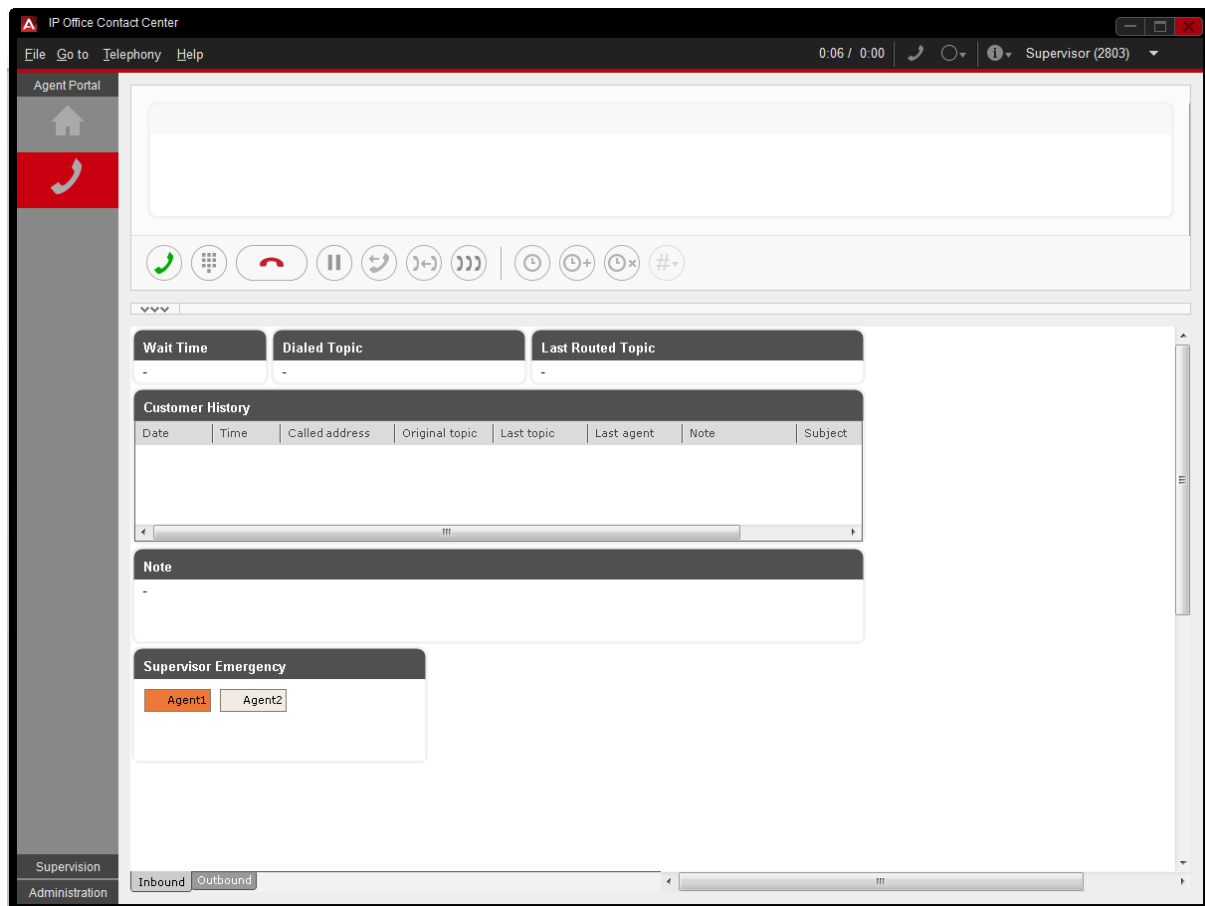
9. The configuration is complete.

## An Example of the Supervisor Emergency feature in use

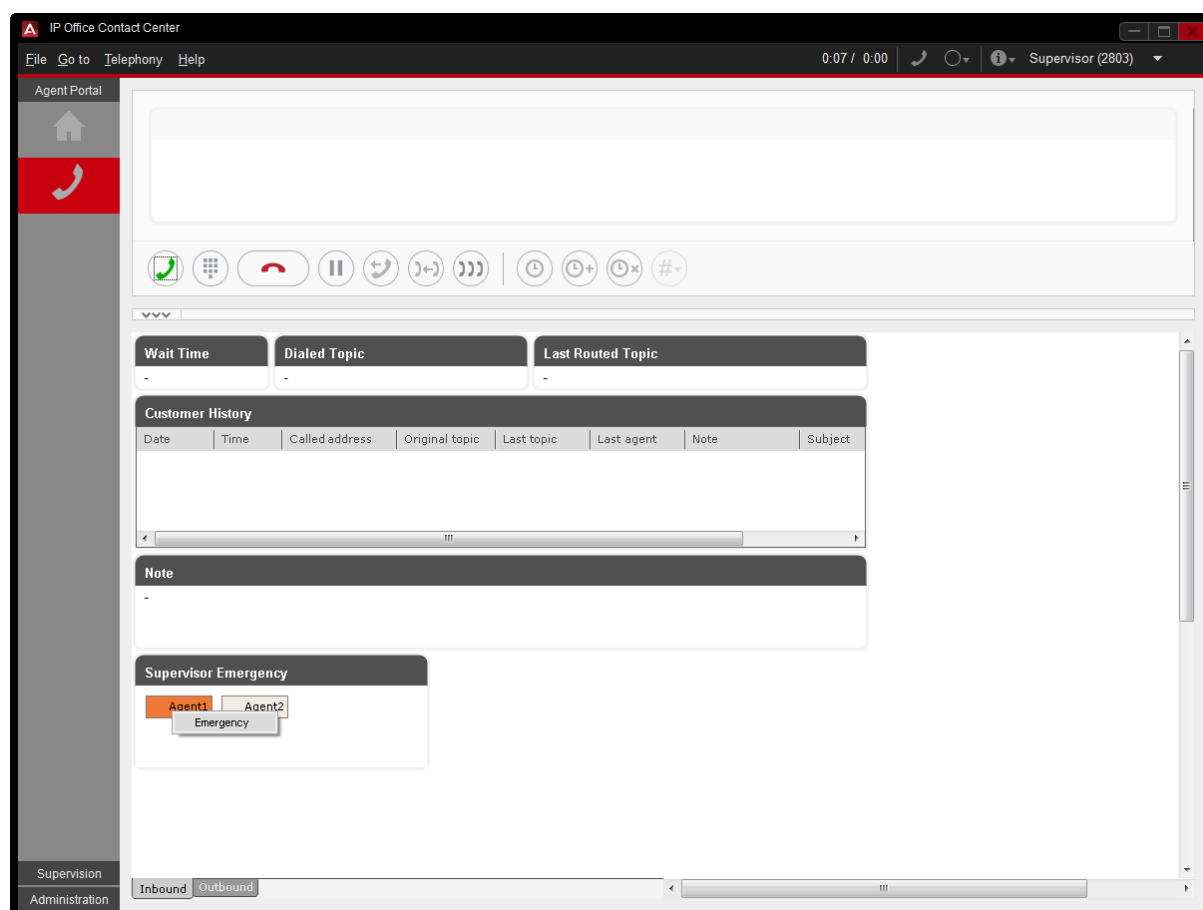
10. While Agent1 is on a Call they can request assistance from a supervisor by clicking the **Supervisor Emergency** button.



11. The Supervisor is alerted of the request.

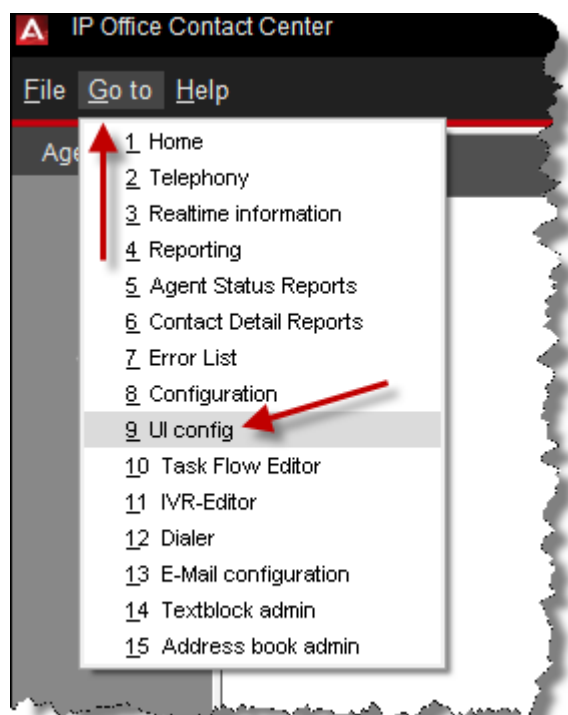


12. The Supervisor can use their Right Mouse Button to select the **Emergency** option and join the Call.

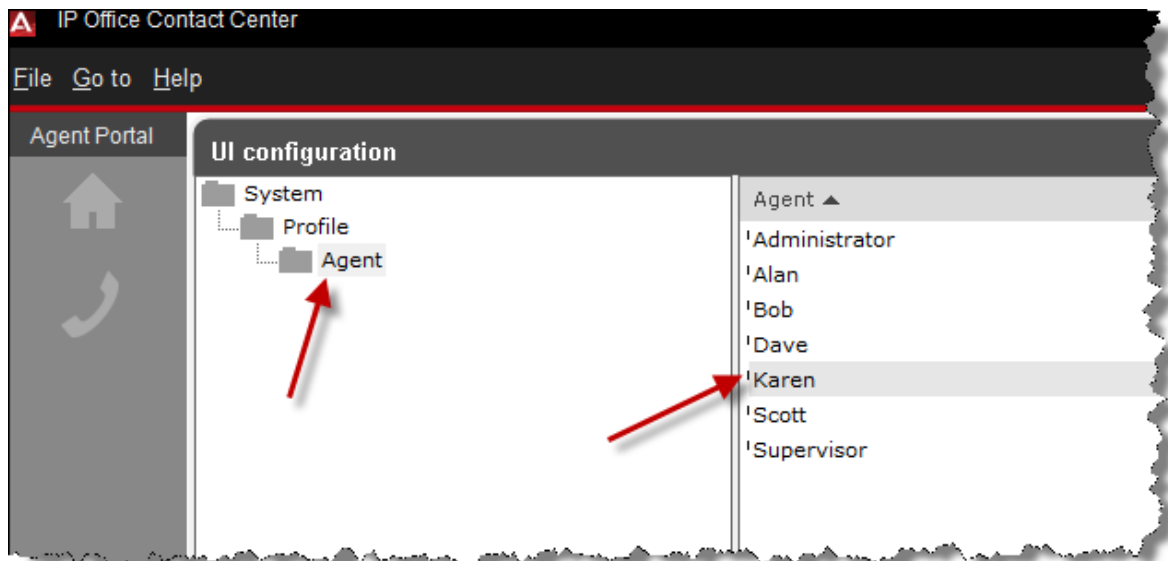


Additional configuration parameters can be viewed from the **UI Configuration** dialogue box.

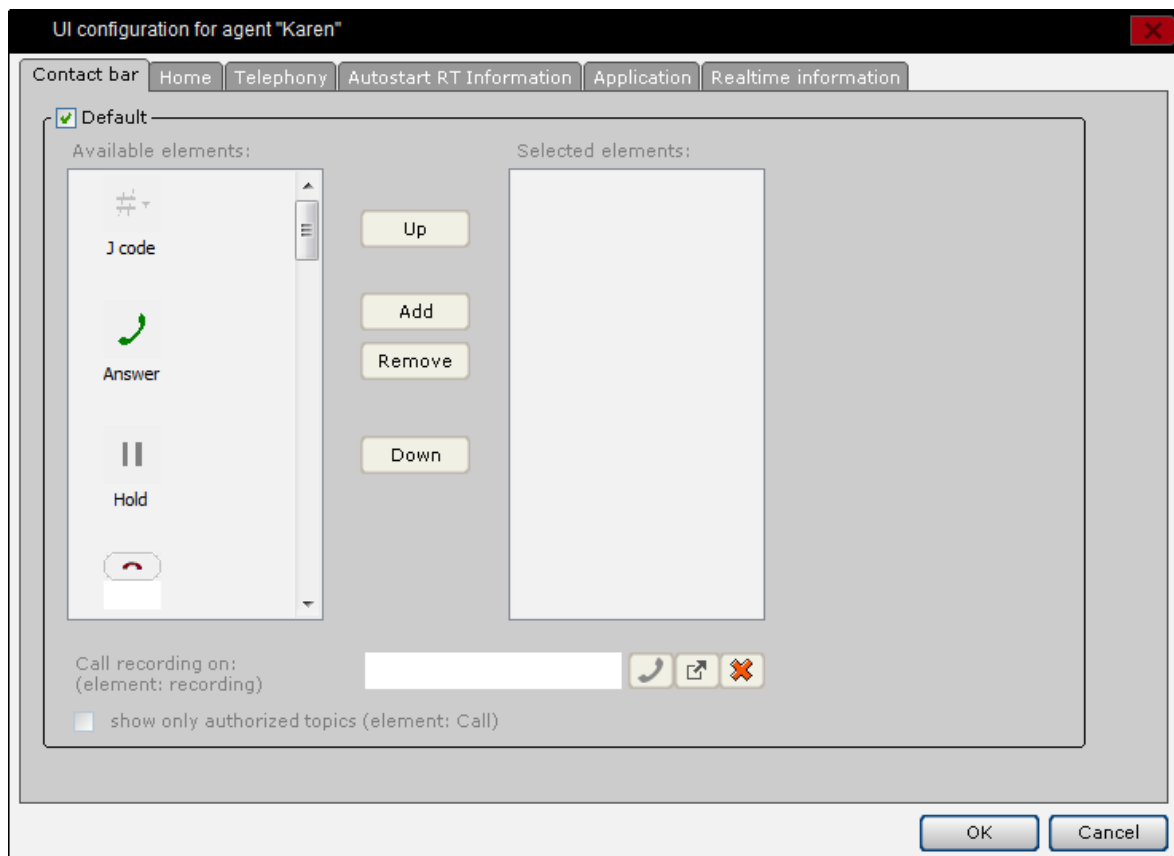
1. Select **Go to** followed by **UI config**.



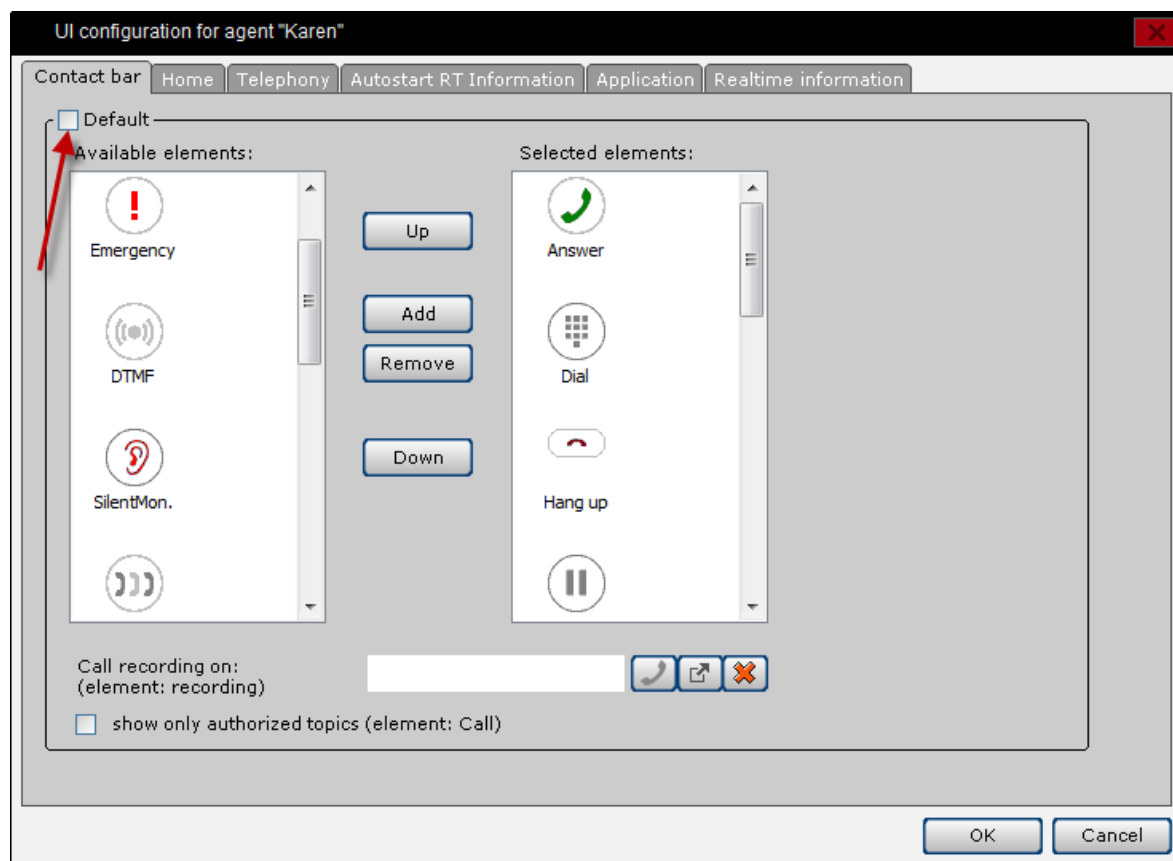
2. In this example, Agent Karen has been selected. Double left click on the agent's name.



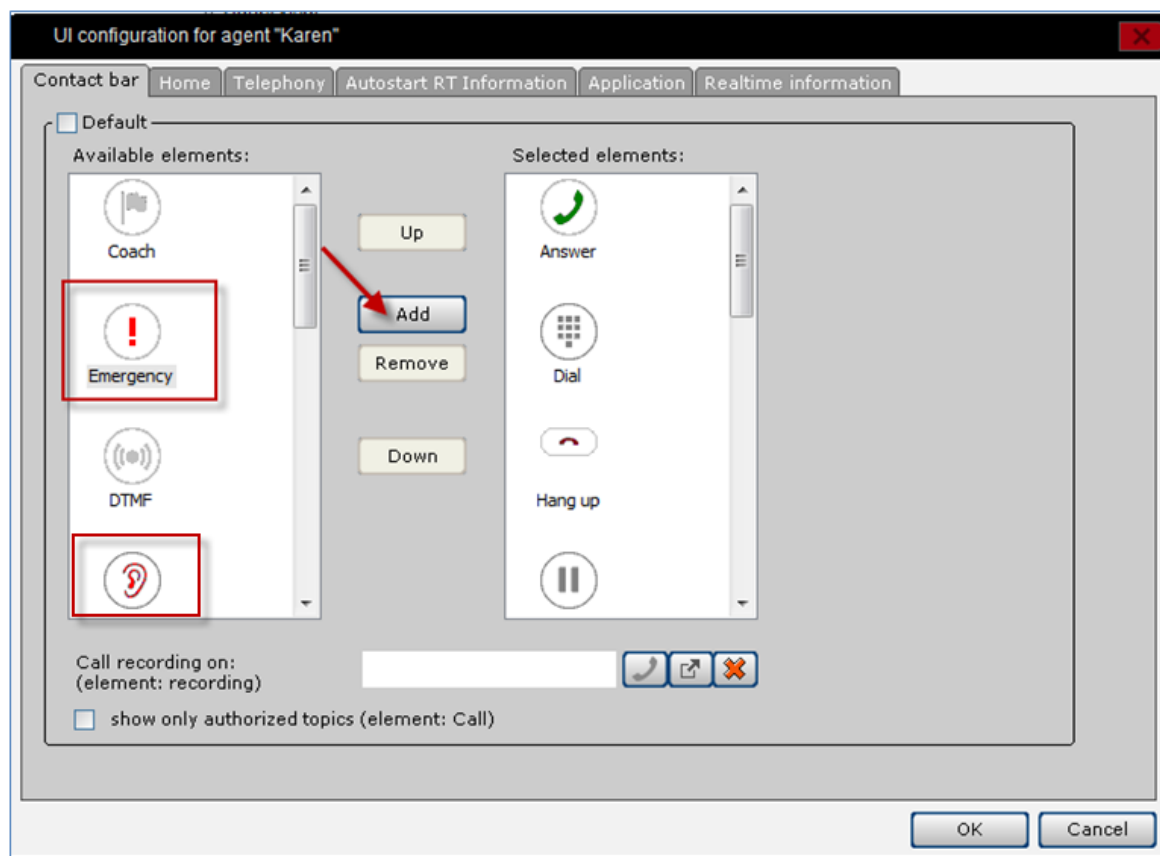
3. The **UI Configuration** dialogue box is displayed.



4. To add additional elements to the Contact Bar, deselect the **Default** check box.

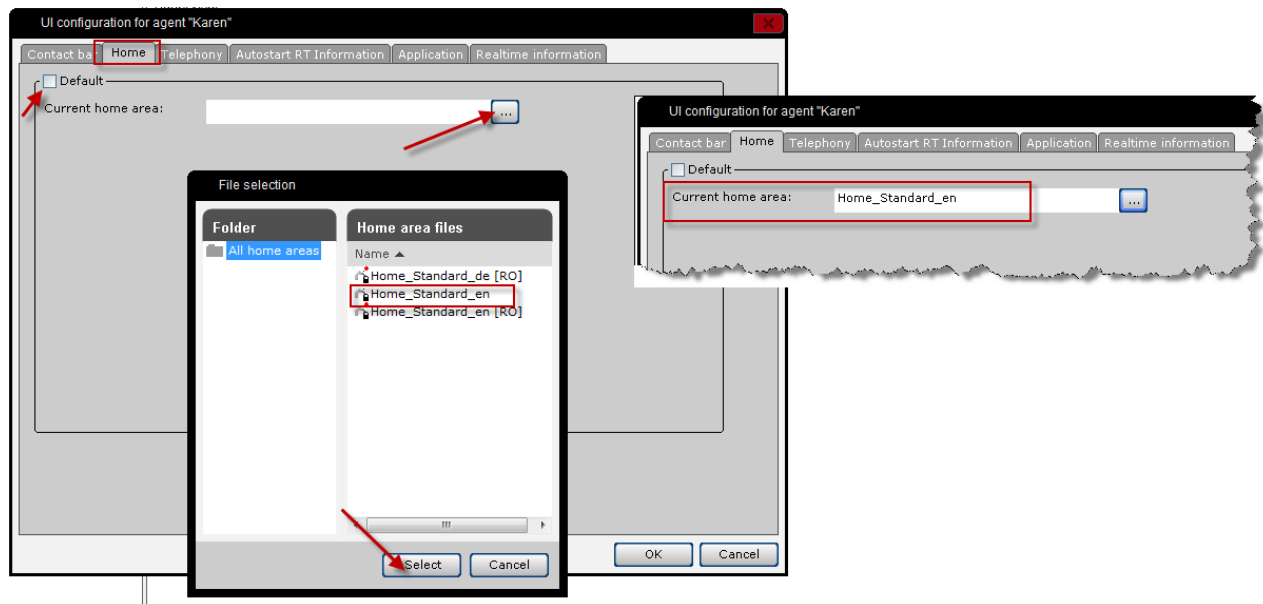


5. Elements can be added for display and use in the **Contact Bar**.

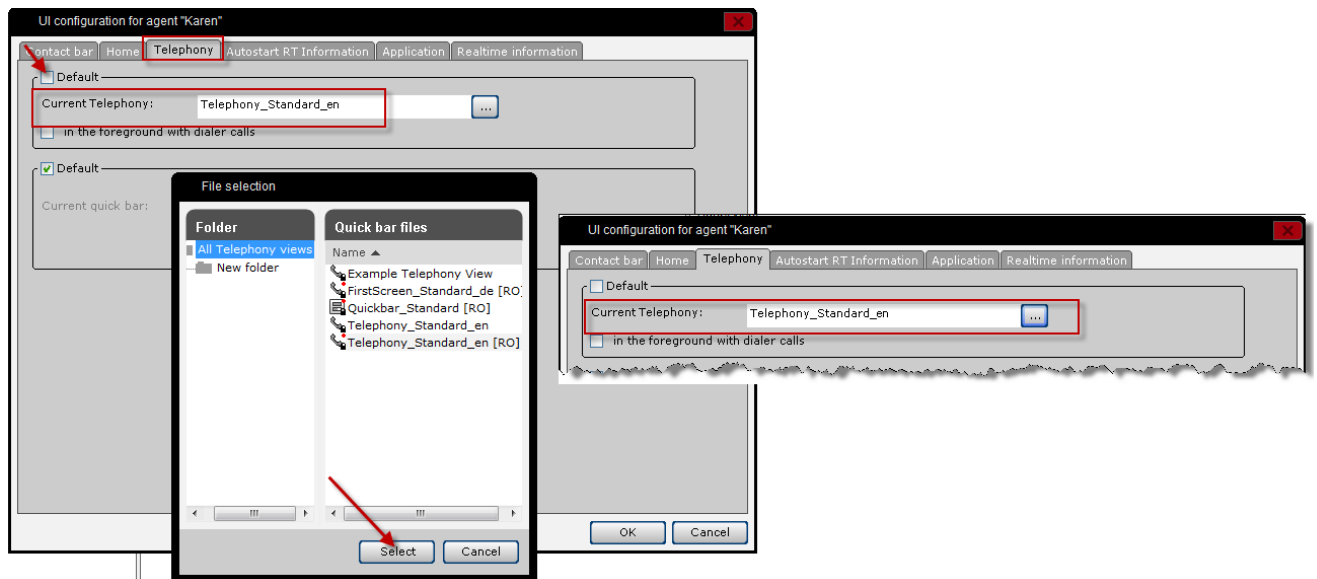




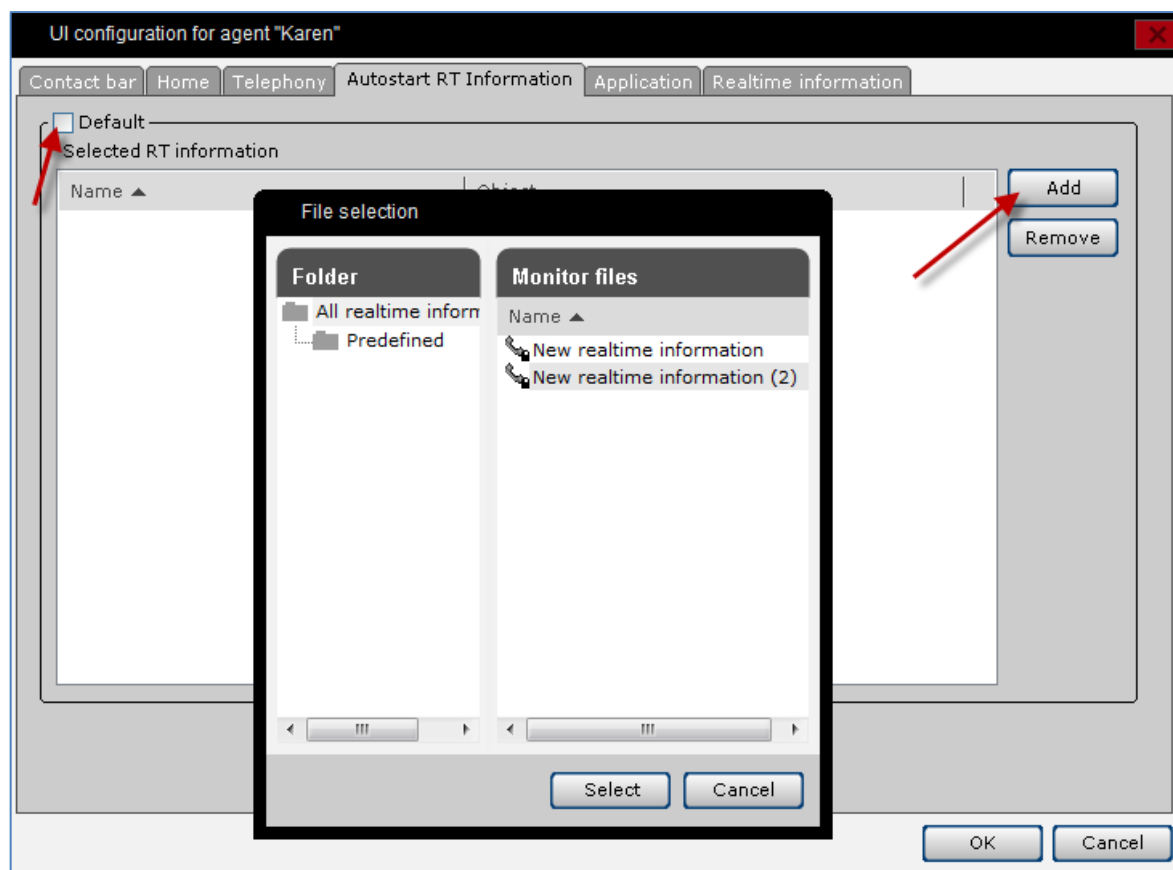
- From the **Home** tab, files can be selected and assigned to be used as the Home view.



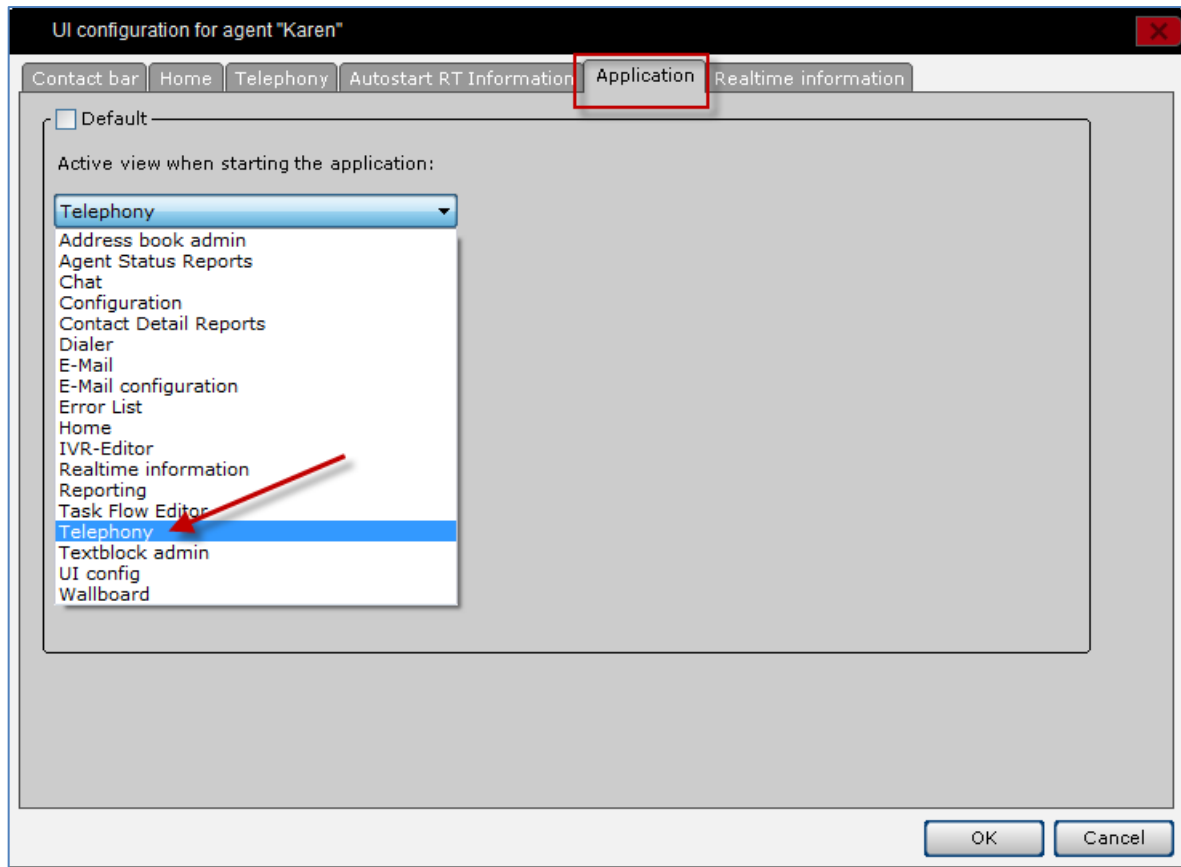
- From the **Telephony** tab, files can be selected and assigned to be used as the **Telephony** view.



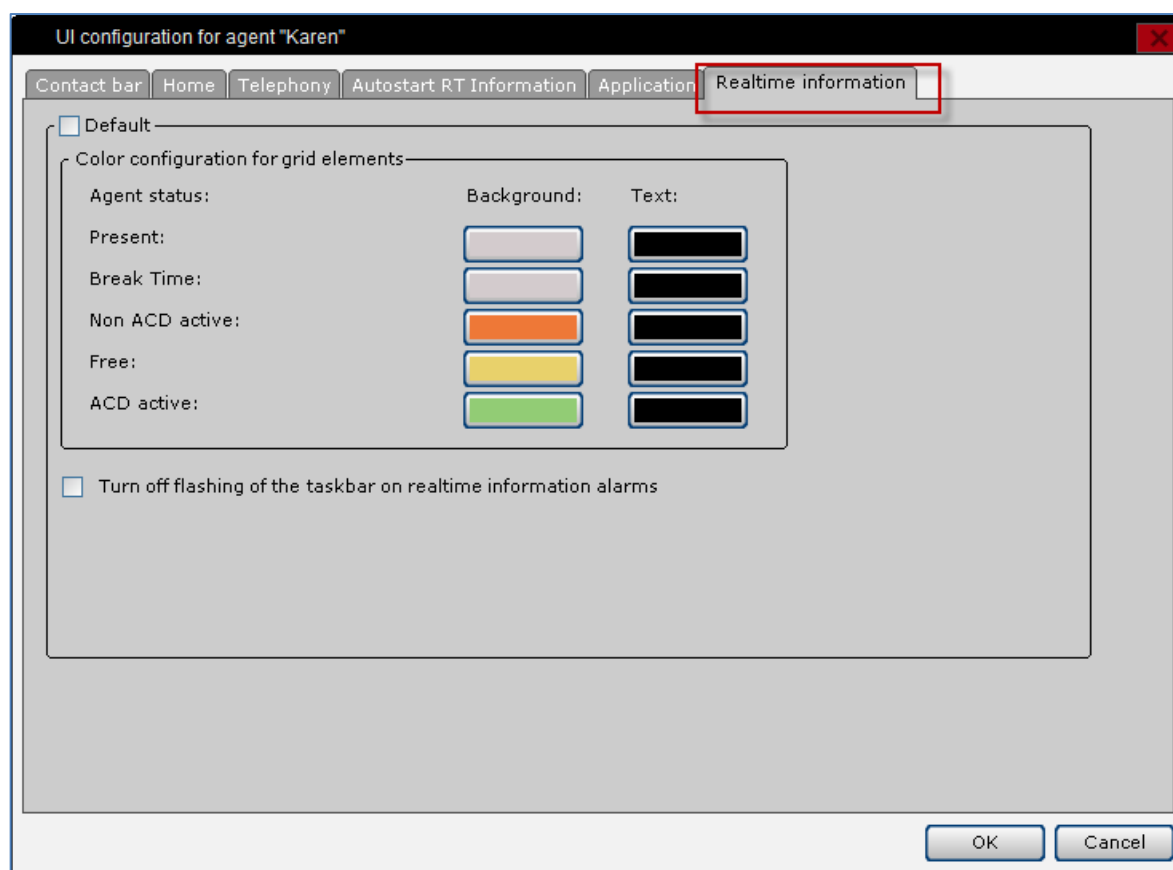
- From the **Autostart RT Information** tab, monitor files can be selected.



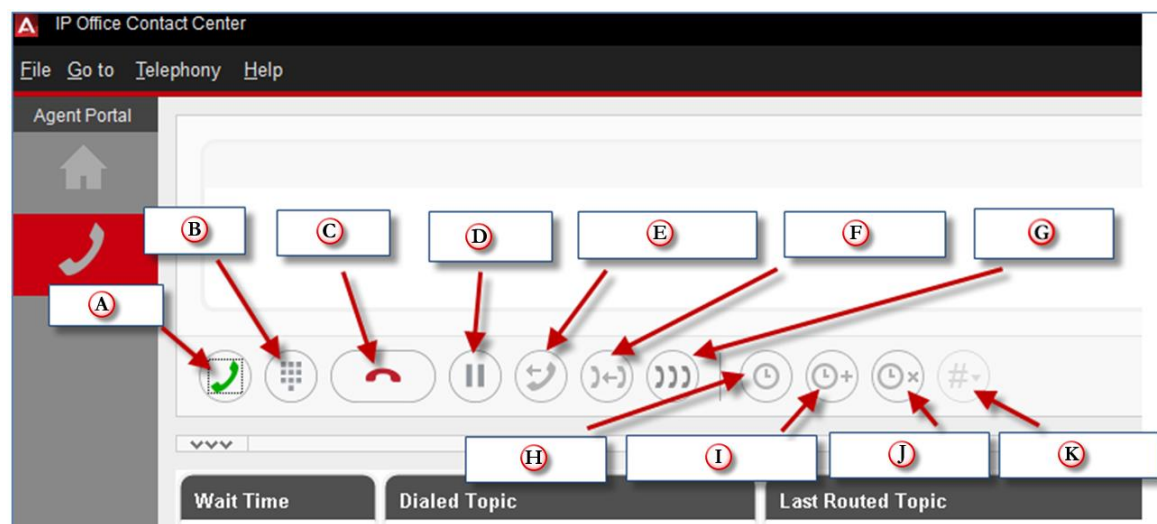
9. From the **Application** tab, the view can be selected that will be displayed when a user signs into the IP Office Contact Center User Interface.



10. The format of the Realtime Information interface can be defined as required from the **Realtime Information** tab.



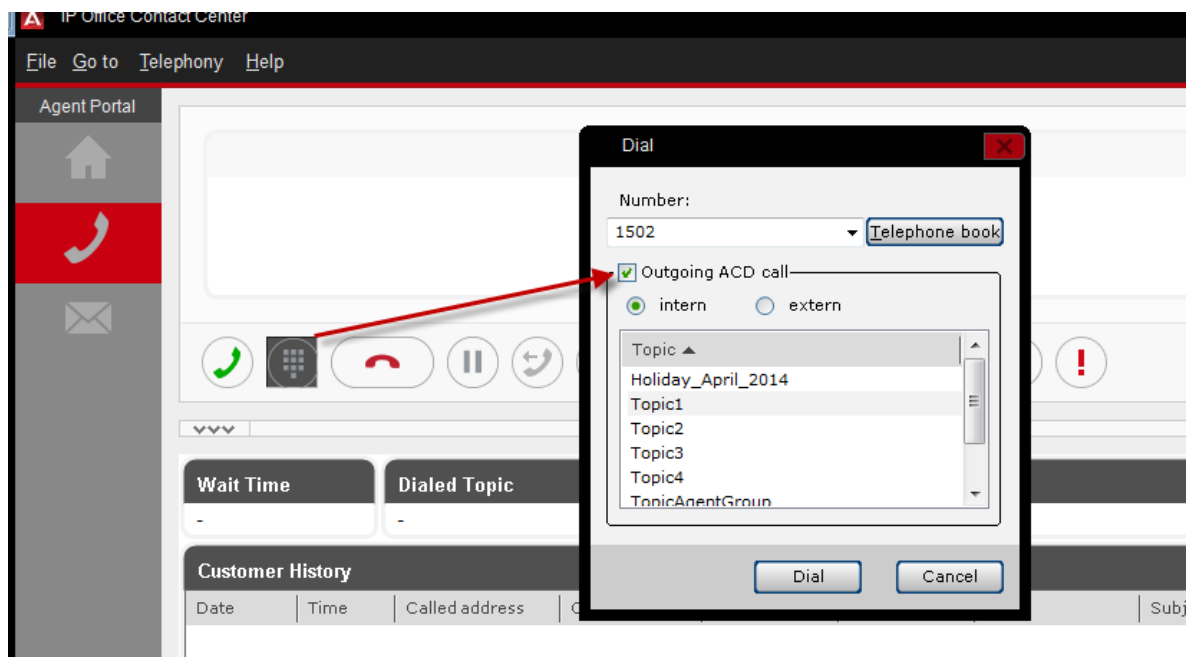
An example of a configured Contact Bar is illustrated below.



- A. Answer
- B. Dial
- C. Hang Up
- D. Hold
- E. Consultation
- F. Transfer
- G. Conference
- H. Wrap Up

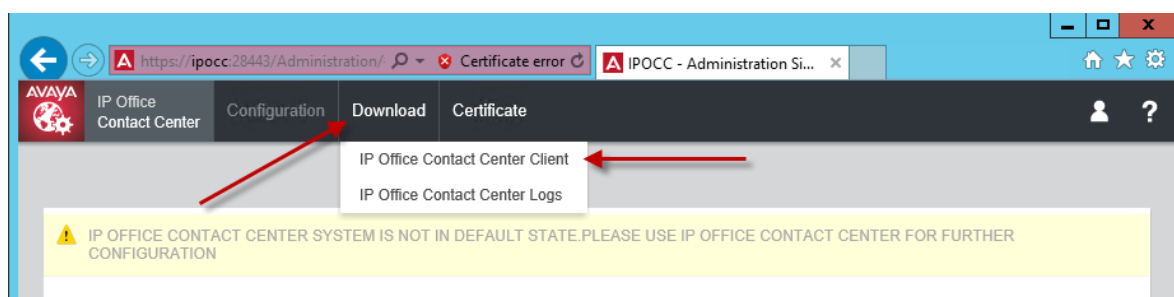
- I. Extend Wrap Up
- J. End Wrap Up
- K. Job Code

**Outgoing ACD Call** – allows calls to be recorded in the database for reporting purposes. A topic can also be selected against the outgoing call being made.



## Upgrading the IP Office Contact Center Client User Interface

**Note:** The Client User Interface software can be downloaded from the **IP Office Contact Center Administration Page Download Link**. Click the **Download** link, followed by **IP Office Contact Center Client**. Please refer to the IP Office Contact Center Installation Task Based Guide for further details.



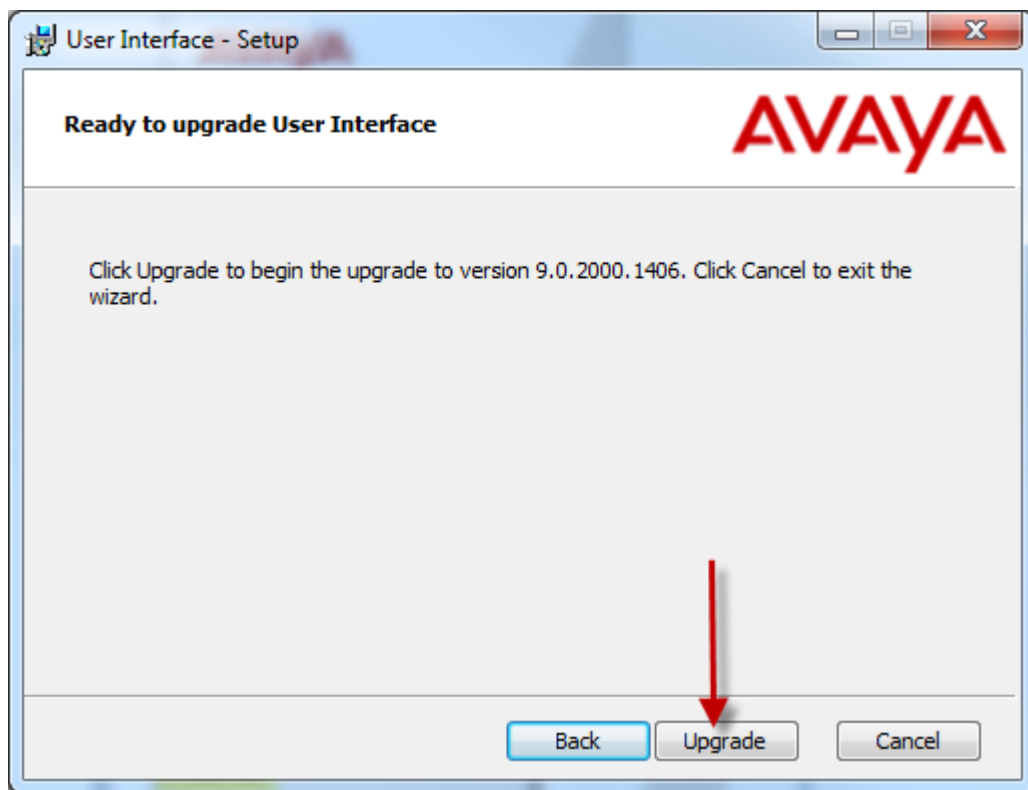
The software can also be found on the IP Office Contact Center installation CD within the Client folder or from Avaya's Support Website. If in doubt, please check with Avaya that you have the required version of software.

To upgrade the IP Office Contact Center User Interface:

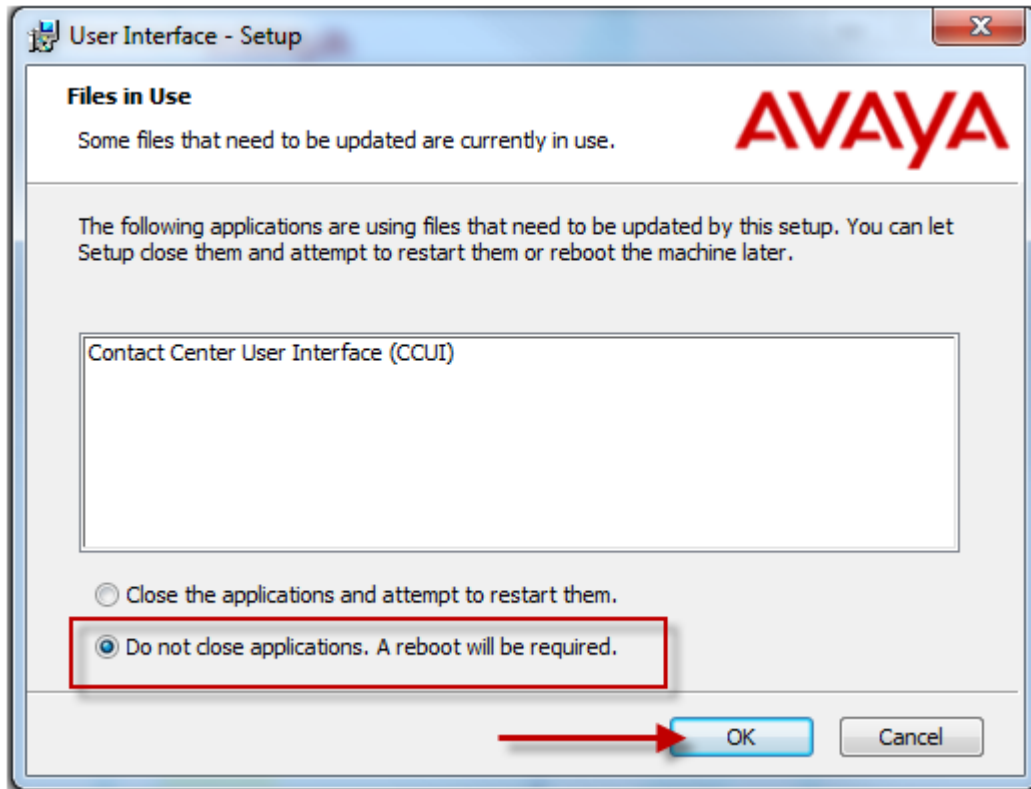
1. Check and make a note of the software version.



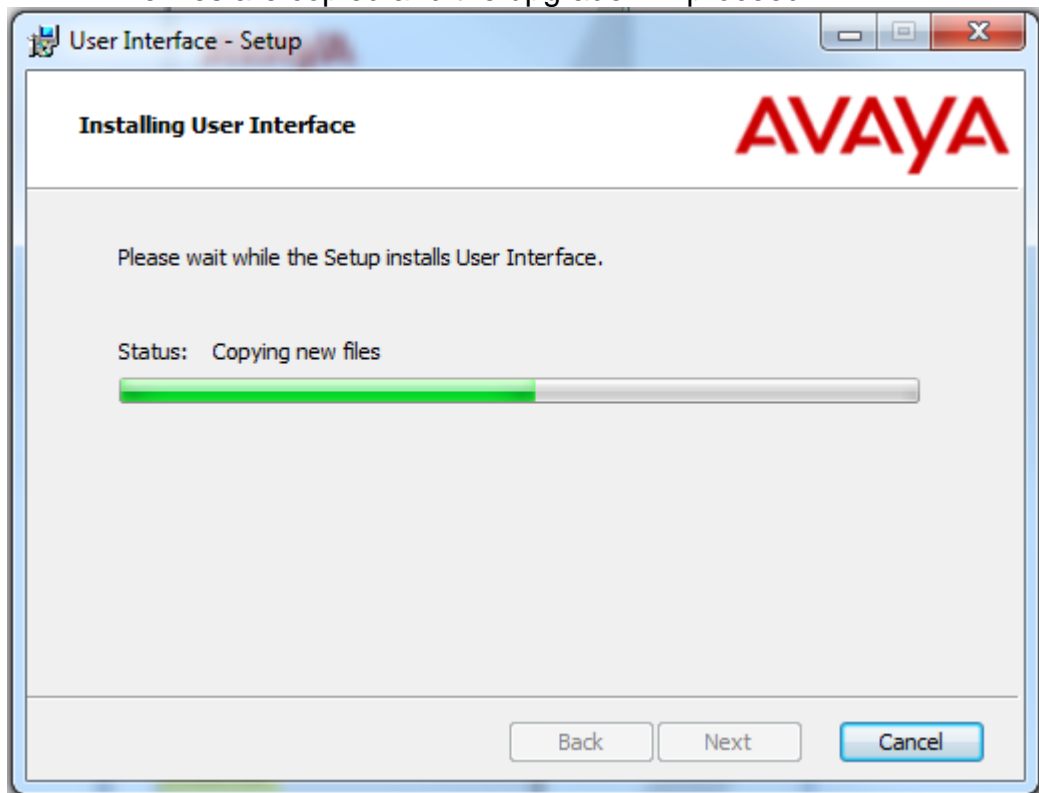
2. Click the **Upgrade** button.



3. Select the **Do not close applications**. A reboot will be required. Click the **OK** button.



4. The files are copied and the upgrade will proceed.



5. Click the **Finish** button.





## Avaya Documentation

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

## Avaya IP Office Contact Center Task Based Guides

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

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

## ITEL IP Office Task Based Guides

### Initial Installation

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

### UCM

10. IP Office Unified Communications Module

### **Core Telephony**

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

### **Users, Telephone & Softphone Configuration**

- 17. IP Office Configuring IP Office Phones and User Accounts
- 18. IP Office Call Handling
- 19. IP Office Configuring the IP Office Softphone

### **Auto Attendant & Voicemail**

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

### **Voicemail Pro**

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

### **One X Portal & IP Office Applications**

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

### **Customer Call Reporter – CCR**

- 32. IP Office Customer Call Reporter Configuration Guide
- 33. IP Office Customer Call Reporter Wallboard Guide

### **Contact Store & Receptionist Console**

- |  |
|--|
| <ul style="list-style-type: none"><li>34. IP Office Contact Store</li><li>35. IP Office Receptionist Console</li></ul> |
|--|

### **Maintenance**

- |  |
|--|
| <ul style="list-style-type: none"><li>36. IP Office Backup and Restore</li><li>37. IP Office System Status Application</li><li>38. IP Office Upgrade Guide</li></ul> |
|--|