



Avaya™ Interaction Center
Release 6.1
VTel User Guide

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Preventing toll fraud

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

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<http://www.avaya.com>

Select **Support**, then select **Escalation Lists**. This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

Providing telecommunications security

Telecommunications security (of voice, data, and video communications) is the prevention of any type of intrusion to (that is, either unauthorized or malicious access to or use of) your company's telecommunications equipment by some party.

Your company's "telecommunications equipment" includes both this Avaya product and any other voice/data/video equipment that could be accessed via this Avaya product (that is, "networked equipment").

An "outside party" is anyone who is not a corporate employee, agent, subcontractor, or person working on your company's behalf. Whereas, a "malicious party" is anyone (including someone who may be otherwise authorized) who accesses your telecommunications equipment with either malicious or mischievous intent.

Such intrusions may be either to/through synchronous (time-multiplexed and/or circuit-based) or asynchronous (character-, message-, or packet-based) equipment or interfaces for reasons of:

- Use (of capabilities special to the accessed equipment)
- Theft (such as, of intellectual property, financial assets, or toll-facility access)
- Eavesdropping (privacy invasions to humans)
- Mischief (troubling, but apparently innocuous, tampering)
- Harm (such as harmful tampering, data loss or alteration, regardless of motive or intent)

Be aware that there may be a risk of unauthorized intrusions associated with your system and/or its networked equipment. Also realize that, if such an intrusion should occur, it could result in a variety of losses to your company (including, but not limited to, human and data privacy, intellectual property, material assets, financial resources, labor costs, and legal costs).

Your responsibility for your company's telecommunications security

The final responsibility for securing both this system and its networked equipment rests with you, an Avaya customer's system administrator, your telecommunications peers, and your managers. Base the fulfillment of your responsibility on acquired knowledge and resources from a variety of sources, including, but not limited to:

- Installation documents
- System administration documents
- Security documents
- Hardware-/software-based security tools
- Shared information between you and your peers
- Telecommunications security experts

To prevent intrusions to your telecommunications equipment, you and your peers should carefully program and configure:

- Your Avaya-provided telecommunications systems and their interfaces
- Your Avaya-provided software applications, as well as their underlying hardware/software platforms and interfaces
- Any other equipment networked to your Avaya products.

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Avaya support

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

<http://www.avaya.com>

Select **Support**, then select **Escalation Lists**. This Web site includes telephone numbers for escalation within the United States. For escalation telephone numbers outside the United States, select **Global Escalation List**.

Avaya Training

Avaya provides training for Avaya Operational Analyst. For more information, contact Avaya University at:

Web site: http://www.avaya-learning.com/logon_form.asp

E-mail address: avaya.u.helpdesk@accenture.com

US telephone: 1-800-288-5327

Outside US telephone: +1-303-406-6089

Comments

To comment on this document, send e-mail to crminfodev@avaya.com.

Acknowledgment

This document was written by the CRM Information Development group.

**Avaya™ Interaction Center
Release 6.1
Vtel User Guide**

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Before You Begin

Typographical Conventions

This guide uses the following font conventions:

Font Type	Meaning
<code>command</code>	This font signifies commands, information that you enter into the computer, or information contained in a file on your computer.
<i>commandvariable</i>	This font indicates variables in a command string.
<i>italics</i>	This font is used to add emphasis to important words and for references to other chapter names and manual titles.
link	Blue underlined text in online documents indicates a hypertext jump to related information. To view the related material, click the blue underlined text.

Notes, Tips, and Cautions

Note:

A note calls attention to important information.

 **Important:**

An important note calls attention to a situation that has the potential to cause serious inconvenience or other similar repercussions.

Tip:

A tip offers additional how-to advice.

 **CAUTION:**

A caution points out actions that may lead to data loss or other serious problems.

Contacting Technical Support

If you are having trouble using Avaya software, you should:

1. Retry the action. Carefully follow the instructions in written or online documentation.
2. Check the documentation that came with your hardware for maintenance or hardware-related issues.
3. Note the sequence of events that led to the problem and the exact messages displayed. Have the Avaya documentation available.
4. If you continue to have a problem, contact Avaya Technical Support by:
 - Logging in to the Avaya Technical Support Web site
<http://www.avaya.com/support/qq>
 - Calling or faxing one of the following numbers from 8:30 a.m. to 8:30 p.m. (Eastern Standard Time), Monday through Friday (excluding holidays):
 - Toll free in the U.S. and Canada: 1-888-TECH-SPT (1-888-832-4778)
 - Direct line for international and domestic calls: 1-512-425-2201
 - Direct line for faxes: 1-512-997-4330
 - Sending email with your question or problem to crmsupport@avaya.com. You may be asked to email one or more files to Technical Support for analysis of your application and its environment.

Note:

If you have difficulty reaching Avaya Technical Support through the above URL or email address, please go to <http://www.avaya.com> for further information.

Product Documentation

Most Avaya product documentation is available in both printed and online form. However, some reference material is available only online, and certain information is available only in printed form. A PDF document with detailed information about all of the documentation for the Avaya Interaction Center is included in the `Doc` directory on the product CD-ROM. This PDF document is also included on the separate documentation CD-ROM.

Readme File

The Readme file is a PDF file included on the Avaya Interaction Center software CD-ROM. This file contains important information that was collected too late for inclusion in the printed documentation. The Readme file can include installation instructions, system

requirements, information on new product features and enhancements, suggested work-arounds to known problems, and other information critical to successfully installing and using your Avaya software. Avaya may also deliver an Addendum to the Readme, which will be posted on the Avaya Technical Support Web site. The Readme Addendum will contain similar information uncovered after the manufacture of the product CD-ROM. Review the Readme file and the Readme Addendum before you install your new Avaya software.

Electronic Documentation

The electronic documentation (in PDF or HTML format) for each Avaya Interaction Center product is installed automatically with the program. Electronic documentation for the entire Avaya product suite is included on the product CD-ROM and the documentation CD-ROM.

You can also view the documentation set online at <http://www.avayadocs.com>.

Printed Documentation

You can purchase printed copies of these manuals separately. For details, see [Ordering information: Avaya Publications Center](#) on the back of this manual's title page.

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Before You Begin

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- Over the telephone at 800-288-5327 (within the U.S.) +001 303-406-6089 (outside of the U.S.)
- Through email at Avaya.U.Helpdesk@accenture.com



Chapter 1: Overview

This section provides an overview of the VTel softphone. It contains the following topics:

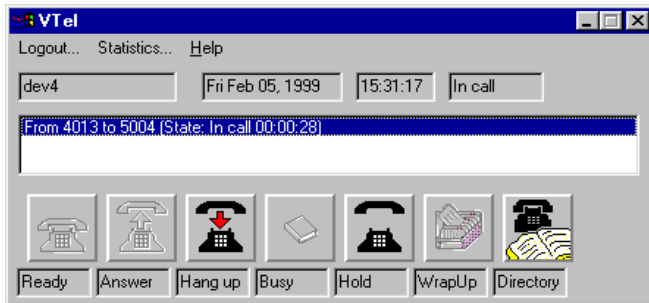
- [VTel softphone](#) on page 10
- [Terms and definitions](#) on page 11
- [Call routing and queues](#) on page 12

 **Important:**

The VTel softphone executable is installed with Avaya Interaction Center. However, it is not enabled to run out-of-the-box. In order to enable the VTel softphone, please contact Technical Support for assistance. Contact information is available in [Contacting Technical Support](#) on page 6.

VTel softphone

The VTel softphone allows agents (also known as Customer Service Representatives, or CSRs) to perform standard telephone operations without using a physical phone set. VTel can be positioned vertically or horizontally on your desktop, as shown in the following illustration.



Depending on your system configuration, you can use the VTel softphone to:

- Make calls
- Receive calls
- Transfer calls
- Initiate consultative transfers or conference calls
- Place calls on hold
- Terminate calls

[The VTel user interface](#) on page 17 describes how to use the VTel softphone to perform these standard telephone operations.

Terms and definitions

Term	Definition
call	An active connection between two or more parties that allows transmission of speech.
call type	Distinguishes between <i>direct calls</i> , which are calls placed to a specific equipment phone number, and <i>ACD calls</i> , which are calls placed to a phone number that is controlled by an Automatic Call Distribution (ACD) system.
line appearances	The number of possible simultaneous calls on a telephone. Available line appearances for a phone can be divided according to whether a call is inbound or outbound, internal or external, or with mixed limits for different types of calls.
phone	An implement that can accept and/or make calls, and has at least one line appearance available. <i>Simple phones</i> can accept only direct calls. <i>ACD phones</i> can accept both direct calls and ACD calls.

Call routing and queues

Term	Definition
queue	<p>A means of routing calls to any one of a number of agents qualified to handle the call. Each queue is often oriented toward a specific product, a specific service, or a particular skill set. In some systems, each time an agent logs into the system, the skills associated with his ID are used to place him in a queue. In other systems, the agent must directly specify the queue. Depending on the telephone switch used, an agent can be in several queues at once, or can be changed to other queues by a supervisor to meet changing needs during the day.</p>
routing	<p>Calls are routed to a phone when:</p> <ul style="list-style-type: none">● the specific phone number assigned to the phone is called (a direct call)● a logical phone number, which is mapped to the specific phone number, is called (a direct call)● the call arrives through a call queue (an ACD call) <p>All ACD calls, and only ACD calls, are handled through a queue. When an ACD call is transferred directly to another agent (not another queue), it becomes a direct call.</p>

■ ■ ■ ■ ■ ■ Chapter 2: Using VTel

This section explains how to use VTel. It contains the following topics:

- [Before logging into VTel](#) on page 14
- [VTel Login](#) on page 15
- [The VTel user interface](#) on page 17
- [The VTel main menu](#) on page 18
- [Ready, Busy, and WrapUp states](#) on page 23
- [Phone state after hang up](#) on page 24
- [Softphone states](#) on page 25
- [DTMF](#) on page 34
- [DEFINITY Reason Codes](#) on page 34

Before logging into VTel

If you have installed but not run VTel, you will need to make sure that the `AVAYA_IC61_HOME` environment variable is set correctly. When you install VTel, a `.bat` file is installed that will add this environment variable for you.

Note:

These instructions are dependent on where you locate the various supporting files to run VTel as a stand-alone application. For more information on installing VTel as a stand-alone application, please contact Technical Support as described in [Contacting Technical Support](#) on page 6.

To set the `AVAYA_IC61_HOME` environment variable:

1. Using Windows Explorer, navigate to the bin directory of your VTel installation. Copy the `vtel.bat` file to the `\etc` directory.
2. Create a shortcut to the `vtel.bat` file by right clicking the `vtel.bat` file and selecting **Create shortcut**. A shortcut will be created in the `\etc` directory.
3. Move the shortcut to your desktop by dragging and dropping the shortcut file.
4. Right-click the shortcut on your desktop and select **Properties**. In the **Start in** box, make sure that the path specifies the directory where you copied the `vtel.bat` file. Click **Apply** to save the changes, then click **OK** to close the **Properties** window. To start VTel, double-click the shortcut on your desktop.

VTel Login

This illustration shows the VTel **Login** dialog:

Agents may have to identify themselves to the system in two ways: with an Avaya Computer Telephony for IC (Telephony) Login ID and with an Agent ID.

Individual login entries are determined by the System Administrator. The VTel **Login** dialog fields are defined as follows:

Login ID	An agent is required to log in with a Telephony Login ID. For a direct phone, the system maps this Login ID to the physical phoneset. There is no switch involvement with the login of a direct phone. For an ACD phone, the system maps this Login ID to an Agent ID.
Password	(for Telephony) Confirms the identity of the agent to Telephony.
Agent ID	This is used with Automatic Call Distribution (ACD) phones. An agent logs into the phone system using the Agent ID, and Telephony assigns this ID to the phoneset the agent currently uses. The switch automatically routes calls for that Agent ID to that phone set.
Password	(for Phone) Confirms the identity of the agent to the phone system.

Station ID	Identifies the station or equipment number for the agent's phoneset.
Queue	Depending upon your telephone switch, this may be used with Automatic Call Distribution (ACD) phones. For a DEFINITY switch running in ACD mode, this is the Group Extension number (which can be dialed) specified in the Hunt Group to which the agent is assigned.

Note:

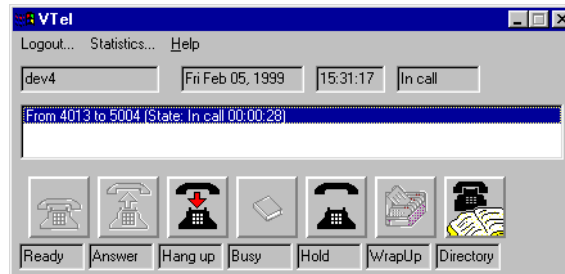
The login procedure is switch-dependent and varies for each system. If you are operating with the Aspect switch 6.0 or greater and a Telephony Server 2.0.0 or greater, your VTel login entries will also log you into your physical phoneset. If you are operating with a Meridian switch, your phoneset must be Off Hook for you to log in.

 **Important:**

On some systems, you may encounter a VTel login error if you attempt to log into VTel when you are already logged into a physical phoneset, or immediately after logging out of the physical phoneset. To clear the error, close and restart VTel. To avoid the error, wait for approximately 15 seconds after logging out of the phoneset before attempting to log into VTel.

The VTel user interface

Once you have logged into the VTel application, the application displays VTel softphone on your desktop. The default view is shown in this illustration:



Note:

Your System Administrator will configure the appearance, behavior, and positioning of the VTel softphone on your desktop; your desktop may differ from the screens presented in this manual.

The four small rectangles across the top, called the *status fields*, contain:

- the agent's login ID (*dev4*)
- the current date (*Fri Feb 05, 1999*)
- the current time (*15:31:17*)
- the phone state (*In call*)

The large rectangular box immediately above the buttons is called the *call list box* and contains information about the current telephone calls. In the call list box, each entry maps to a single line appearance on the phone.

The VTel main menu

The VTel softphone contains a menu bar with three items:

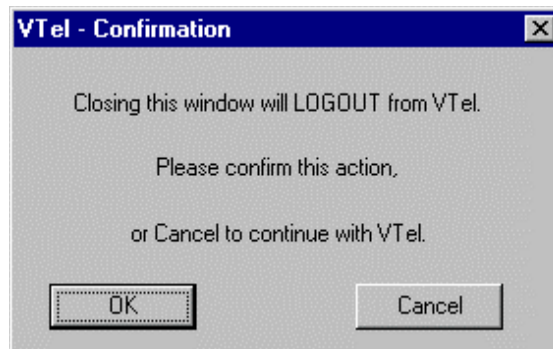
- **Logout**
- **Statistics**
- **Help.**

Logout menu

The **Logout** menu is used to end the current VTel session.

To log out of VTel:

1. Click on the **Logout** menu. VTel displays a logout confirmation message box, seen in Figure 4.
2. Do one of the following:
 - a. Click the **OK** button to end the VTel session.
 - b. Click **Cancel** to continue with VTel.

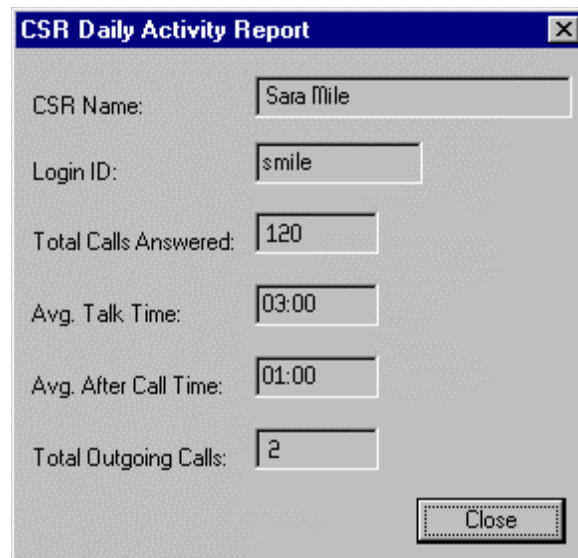


Statistics menu

You can use the **Statistics** menu to obtain information about your daily call activity. The CSR Daily Activity Report measures the average time you have spent in the Talk and After Work phases of total calls answered. The report also records totals for Calls Answered and Outgoing Calls.

The CSR Daily Activity Report enables you to review your daily accomplishments. You may also choose to use this report for other purposes, such as to:

- Gauge how effectively you use **Talk** and **After Call Time**
- Review your **Total Call** goals
- Compare your day-to-day accomplishments



The screenshot shows a window titled "CSR Daily Activity Report" with a close button in the top right corner. The window contains the following fields:

CSR Name:	Sara Mile
Login ID:	smile
Total Calls Answered:	120
Avg. Talk Time:	03:00
Avg. After Call Time:	01:00
Total Outgoing Calls:	2

A "Close" button is located at the bottom right of the window.

When you log into VTel, the CSR Daily Activity Report is created. When you log out of VTel, the contents of the current Daily Activity Report no longer exist.

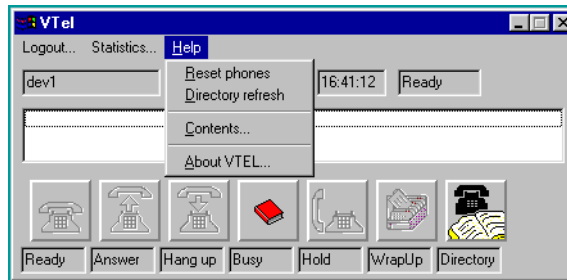
To view information about your daily call activities:

1. Click on the **Statistics** menu. VTel presents the CSR Daily Activity report, as shown in the illustration above.
2. Select **Close** to exit the window.

Help menu

The **Help** menu, shown in the following illustration, contains the following commands:

- **Reset phones**, described in [Reset phones](#) on page 20
- **Directory refresh**, described in [Directory refresh](#) on page 20
- **Contents**, described in [Contents](#) on page 21
- **About VTel**, described in [About VTel](#) on page 21.



Reset phones

Occasionally, communications between VTel and the physical telephone are disrupted and VTel fails to function properly. A failure of this nature is indicated by VTel's inability to perform a telephone operation or, more rarely, VTel's appearance of being 'locked up' for any length of time. **Reset phones** is used to reestablish and synchronize the relationship between VTel and your physical telephone.

To synchronize the relationship between VTel and the phoneset:

1. Complete the current call manually.
2. Select **Reset phones** from the **Help** menu. If this does not resolve the problem, contact your System Administrator.

Note:

Before selecting **Reset phones**, you should always complete the call and set the phoneset to **Busy**. **Reset phones** clears all current activity from VTel, terminating all calls.

Directory refresh

Directory refresh is used to refresh the Dial Directory. The Dial Directory is a listing of all the Telephony users (agents, queues, supervisors, and so on) in your organization. This directory is an internal 'phone book' for you to use when you need to transfer a call or

initiate a conference or consultative call. Refer to [Directory](#) on page 30, for information about using the Dial Directory.

When you log into VTel, the contents of the Dial Directory are retrieved from the Directory Server database and stored in memory on your workstation. Because supervisors frequently make changes to the directory (adding new agents, changing queues, etc.) during the course of daily business, you may want to refresh the directory to ensure that it remains current.

To refresh the Dial Directory window in VTel, select **Directory refresh** from the **Help** menu. The data in the directory is refreshed with the updated information.

Contents

Contents includes a variety of tools that allow you to access the library of help topics. This command also permits you to move from topic to topic throughout the Help system.

To display Help Contents and choose a topic, do one of the following:

- from the **Help** menu, select **Contents**
- click on the menu you want information about and press **F1**

The main Contents window opens and displays a series of buttons located along the top of the Help window. Combined, these buttons allow you to move through the Help system and to perform searches using a variety of methods. These buttons are:

Help Topics	The Help Topics dialog box contains the search keywords list which is similar to that of a book's index. Choose from the index entry list or type a word (partial or whole) to help narrow your search.
Back	The Back button returns you to the topic that has been most recently viewed. Use this feature to retrace your steps through Online Help.
<< and >>	The Browse Sequence buttons allow you to navigate backward (<<) or forward (>>) through a predefined sequence of Help topics. When you have reached the first or last topic in the series, the button is grayed.
Print	The Print button allows you to print the contents of the topic being viewed. Your ability to print Help Topics is determined by default printer settings on your desktop.

About VTel

The **About VTel** command displays a window containing the VTel release number that is running on your system.

Using VTel

To view the release number of the VTel program:

1. Select **About VTel** from the **Help** menu.
2. Click the **OK** button to close the window.

Ready, Busy, and WrapUp states

Some telephone switches support a variety of states for ACD phones, including:

- the *Ready* state, which makes the phone available to receive another call. The Ready state is sometimes known as *Available*.
- the *Busy* state, which prevents the switch from sending a new ACD call, but will generally allow new direct calls if additional inbound line appearances are available. The Busy state is sometimes known as *Auxiliary Work* (or *Aux Work*).
- the *WrapUp* state, which follows a call when the call has ended (on hook, hangup) but the agent is still processing information related to that call or customer. The WrapUp state is sometimes known as *After Call Work* (or *ACW*).

Note:

WrapUp for direct calls is switch-dependent.

While a direct call is active, you generally cannot put the phone in the Ready state for another ACD call. Although VTel may remain in the Ready state, the telephone switch will prevent the queue from dispatching another call until the phone is idle.

 **Important:**

When using a physical phoneset in conjunction with VTel, you should avoid changing states using the physical phoneset. For example, if VTel is preset to enter the Ready state after a call ends, and you set your physical phoneset to enter the WrapUp state after a call ends, VTel and your physical phoneset may be out of sync when you end a call. To prevent this condition, try to use VTel to change states.

Phone state after hang up

The default state after hang up is configured by your System Administrator. The manner in which you override a default state setting will depend on whether your System Administrator has configured VTel to be in the Preset style or the Immediate style. (Either style of override is available only for ACD calls.)

Softphone states

The VTel softphone enables you to perform standard telephone operations without having to touch a physical telephone. The status of VTel is displayed below the main menu and will determine the operability of buttons on the VTel softphone (e.g., you must be in an In call state to place a call on hold or hang up a call).

CAUTION:

If a call's preset state settings on the VTel softphone and the physical telephone are set differently, using both the VTel softphone and the telephone interchangeably may cause the VTel softphone to become unresponsive. To avoid this problem, ask your System Administrator to confirm that the preset state settings for your physical telephone and the VTel softphone are identical.

Note:

The buttons, icons, and labels on your VTel desktop may differ from those shown in the illustrations that follow.

The Softphone states are described in the following sections:

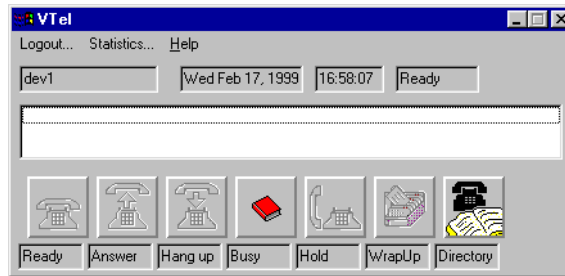
- [Ready](#) on page 25
- [Answer](#) on page 26
- [In Call](#) on page 26
- [Busy](#) on page 28
- [Hold](#) on page 28
- [WrapUp](#) on page 29

Ready

Your VTel softphone may be configured to place you in the Ready state when you log into VTel. If the VTel softphone does not place you in the Ready state at log in, click the **Ready** button to enter the Ready state.

Using VTel

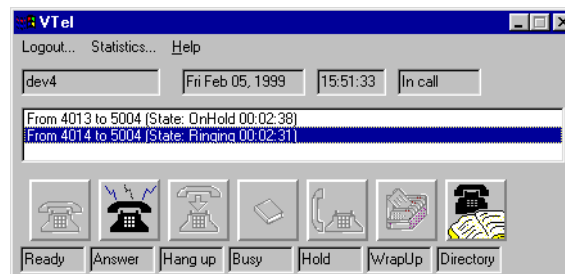
The *Ready* state indicates that VTel is ready to accept a telephone call. The current date, time, and state are displayed in the corresponding phone state display boxes.



In the illustration, the phone is in the Ready state and is able to accept an incoming call. The agent could click the **Busy** button to enter the Busy state, or could click the **Directory** button to view the Dial Directory.

Answer

The ringing telephone icon in this illustration indicates that there is an incoming call. The incoming call has changed the contents of phone-state status field from Ready to In call. Information about the call is displayed in the call list box.



To answer the call, click the **Answer** button.

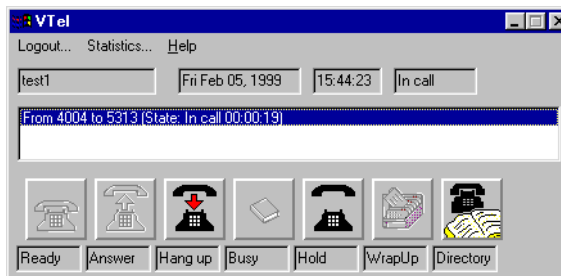
Note:

Since auto-answer can be configured for both ACD and direct calls, many agents will not use the **Answer** button.

In Call

Once an incoming call has been answered, VTel displays additional buttons that enable agents to perform a variety of telephone operations.

In call (direct call)

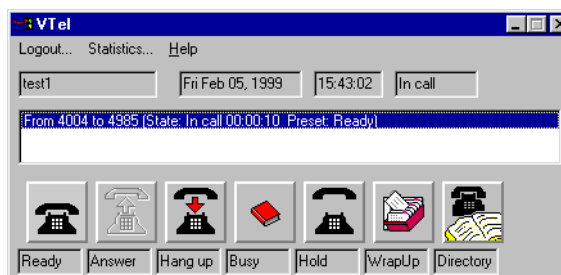


In this illustration, an incoming direct call has been answered. The current phone state is In call. The call list box contains information about the origin of the call, whence the call was delivered, and the time elapsed since the call was answered.

It is clear that this call is a direct call because:

- the information about the call in the call list box does not contain the word *Preset*, indicating that the Preset style is not enabled. The Preset style cannot be enabled for a direct call.
- the **Ready**, **Busy**, and **WrapUp** buttons are disabled. The Preset and the Immediate styles cannot be used with direct calls. As a result, the functions available in those styles cannot be used.

In call (ACD call)



In this illustration, an incoming direct call has been answered. The current phone state is In call. The call list box contains information about the origin of the call, whence the call was delivered, and the time elapsed since the call was answered.

It is clear that this call is a ACD call because:

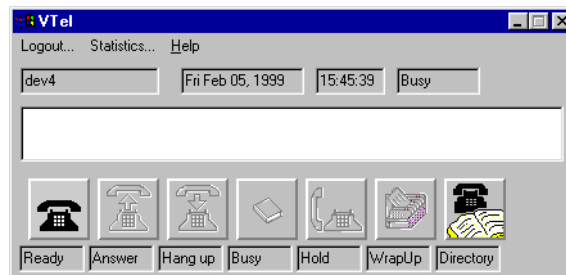
- The information about the call in the call list box contains the word *Preset*, indicating that the Preset style is enabled. The Preset style can be enabled for an ACD call.
- The **Ready**, **Busy**, and **WrapUp** buttons are enabled. The Preset and the Immediate styles can only be used with ACD calls. As a result, the functions available in those styles are available.

Busy

The Busy state indicates that the agent is unable to accept an incoming ACD call, although new direct calls may continue to arrive on the desktop.

Note:

A phone is considered busy when it is in the In call or WrapUp state. However, VTel lists the phone state as Busy only when the busy state has been entered by the agent clicking the **Busy** button.



In this illustration, the agent has clicked the **Busy** button to prevent VTel from sending a new ACD call. Notice that the phone state is Busy. The agent could click the **Ready** button to return to the ready state, or could click the **Directory** button to view the Dial Directory.

Note:

When the `vtel.ini` file property `IgnoreCallsWhenBusy` is set to `Y` by an agent, and that agent is in the busy or the wrapup state, other agents that make direct calls to that agent are not notified of the incoming direct call by VTel. For more information about the `vtel.ini` file, see [VTel Programmer Guide](#).

Hold

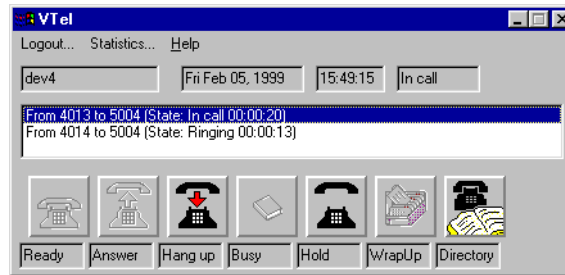
Use the **Hold** button to place a call on hold. Calls on hold are indicated by the `OnHold` statement displayed in the line appearance in the call list box, and by the changed icon associated with the **Hold** button (the handset is vertical, rather than horizontal). To retrieve a call from being on hold, click on the **Hold** button again.

The line appearances in the call list box, seen in the following illustrations, show the agent in the process of servicing two telephone calls. The highlighted line in the call list box is the call that VTel is focused on.

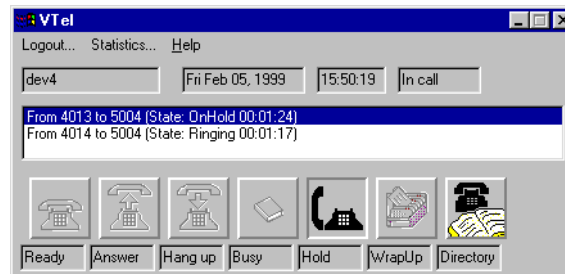
Tip:

To change VTel's focus, click on another line in the call list box.

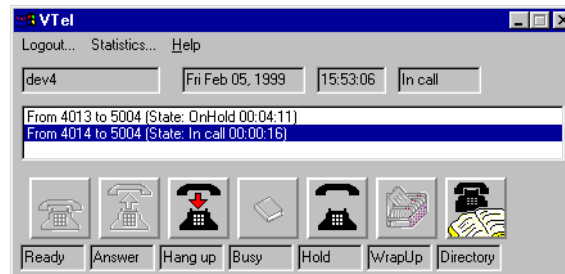
In this illustration, the agent is on a call when a second ACD comes in.



The agent is able to put the first call on hold by clicking the **Hold** button (the handset on the button is vertical). The highlighted line and operable softphone buttons in this illustration indicate that the first call is on hold.



The agent is now able to answer the second call by clicking on the second line appearance:



The highlighted line and operable softphone buttons indicate that the second call is connected.

WrapUp

Agents often need to provide information specific to the reason for, or result of, each call that they service. This information is recorded when the agent enters the WrapUp state.

WrapUp (After Call Work) is the state following a call when the call has ended (on hook, hangup) but the agent is still processing information related to that call or customer.

Your System Administrator will determine:

- the manner in which you input caller information when you enter the WrapUp state

- whether you are automatically put into the WrapUp state after hangup or must click the **WrapUp** button
- whether wrapup information is required for every call

See [VTel WrapUp Functionality](#) on page 35, for more information on VTel wrapup functionality.

Directory

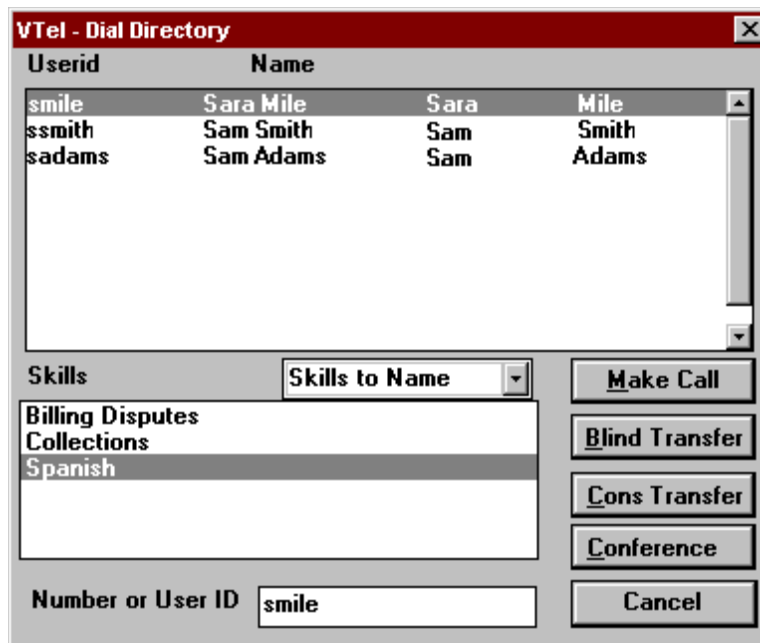
Daily operations often require you to transfer or reroute a caller. The **Directory** button contains a list of personnel and queues; agents are indexed by their User ID and Name (first and last). The Dial Directory window may also include a listing of unique skills from which you may choose, enabling you to route a caller to a specific agent who possesses the skills required to best service that caller's needs (for example, experience with billing disputes or collections, or foreign language ability).

To view the VTel Dial Directory, click the **Directory** button. You will be presented with either the standard Dial Directory window or the sortable Dial Directory, depending on how your System Administrator has configured VTel.

Both Dial Directories have five buttons in the Dial Directory window, as described in this table:.

Button	Description
Make Call	Enables the agent to make a call. The total number of outbound calls is maintained in the CSR Daily Activity Report (refer to Statistics menu on page 18, for additional information).
Blind Transfer	Transfers the caller to another agent or queue. The agent transferring the call cannot announce the caller to the agent receiving the call.
Consultative Transfer	Allows agents to consult with one another prior to transferring the call, with one possibility being that the call will not be transferred.
Conference	Enables multiple people (three or more) to interact in a conference call.
Cancel	Allows the agent to return to the previous window.

Standard Dial Directory

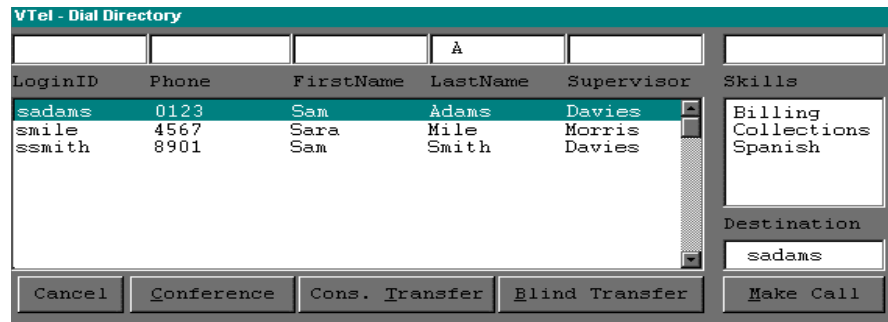


The Skills drop down menu contains two options: **Skills to Name** and **Name to Skills**. These options enable you to view a listing of agents or skills that are associated with your selection.

For example, an agent receives a call from a Spanish-speaking caller. Based on this caller's language requirement, the agent decides to transfer the call directly to a Spanish-speaking agent. To use the directory to transfer the call:

1. Access the **Skills to Name** drop down menu to view a listing of skills associated with agents in the organization.
2. Click on *Spanish* to view the names of all the agents associated with that particular skill set.
3. Specify an agent to transfer the call to. The name of the agent to whom the call will be transferred is displayed in the text box at the bottom of the **Dial Directory** window. In the example above, the selected agent is Sarah Mile (smile).
4. Click one of the transfer buttons to route the caller directly to the Spanish speaking agent.

Sortable Dial Directory



The sortable **Dial Directory** window has an agent list box containing five columns with the following headings:

- **LoginID**
- **Phone**
- **FirstName**
- **LastName**
- **Supervisor**

If you click in the text box above one of these headings, the information in the agent list box is sorted according to that column. For example, if you click in the text box above the heading **LastName**, the information in the agent list box is displayed alphabetically by last name.

You can make a selection from the **Agent** list box in three ways:

- type the desired LoginID directly into the **Destination** text box in the lower right of the **Dial Directory** window.
- click on the desired line in the agent list box. The corresponding LoginID appears in the **Destination** text box.
- start typing in the text box above one of the headings. As you type, the first entry in the list box that corresponds to what you have typed will be highlighted. For example, if you type **S** in the **LastName** text box, the first entry in the list with a last name beginning with **S** is highlighted. If you type **Sm**, the first entry beginning with **Sm** is highlighted. The LoginID of the highlighted entry appears in the **Destination** text box.

Once the LoginID you want appears in the **Destination** text box, click the appropriate button to conference, transfer, or make the call.

If a line in the agent list box is highlighted, the Skills list box contains the list of skills associated with that entry.

Note:

You can also select agents by skills using the **Skills** list box. If you click in the text box above the Skills heading, a listing of all skills is displayed. When you click on one of these skills, the agent list box will contain only those entries that have the selected skill. You can then select an entry from the agent list box as described.

Completing the Transfer

When you initiate a consultative transfer or conference call, VTel places the caller on hold and makes a call to an additional party. At that time, the transfer dialog window is displayed and prompts you to choose the **Complete** or **Cancel** button.

To complete the transfer or connect additional parties, click the **Complete** button. The **Cancel** button ends the transfer or conference by disconnecting the additional party and retrieving the caller from the hold state.



The **Swap Caller** button shown below may be displayed when a consultative transfer or conference call has been initiated. This button toggles between the call on hold and the party to whom you are connecting. At this time, the **Swap Caller** button is switch dependent and is available only for the Aspect 6.0 or higher.



DTMF

If you have a DEFINITY phone switch and the **DTMF** (Dual-Tone Multi-Frequency) button appears in your version of the VTel softphone window, clicking this button will bring up a numeric keypad.

The numeric keypad can be used to type in numbers (for example, the caller's account number, social security number, and identification number). Numbers may be entered either by clicking in the entry field and then typing digits on your keyboard, or by clicking the numeric buttons in the keypad window.

After typing in the number, click the **Send** button to transmit the number. The number will be sent through the phone line as though the appropriate tones representing that number had been dialed on a touch-tone phone.

DEFINITY Reason Codes

If you have a DEFINITY phone switch, your System Administrator may have implemented Reason Codes to be entered when you log out and/or click the **Busy** button on the VTel softphone.

In either case, you must select one of the reasons presented before you can complete the process you initiated (logging out or setting the phone to the Busy state).



Chapter 3: VTel WrapUp Functionality

This section contains information about the VTel WrapUp dialogs. It contains the following topics:

- [WrapUp dialogs](#) on page 36
- [Assigning WrapUp codes](#) on page 42
- [Previous entries](#) on page 43

Note:

Icons, button labels, and dialog labels on your desktop may be different from those shown in the illustrations that follow.

WrapUp dialogs

Call centers have historically documented the *reason* and *outcome* of customer calls. This is accomplished by assigning codes to particular reasons and outcomes. A *reason code* is to describe the purpose of a customer's call or the intent of the work that was performed. If the call center is at a lending institution, for example, reason codes might include *Mortgage Inquiry*, *Auto Loan Inquiry*, *Home Equity Loan Rate Inquiry*, and so on. Each of these reasons is assigned a numeric code; agents select the code and the associated reason.

An *outcome code* is used to identify the action taken or the result of an activity performed by the agent. The call center at the hypothetical lending institution may include outcome codes like *Email Mortgage Rates*, *Call Auto Dealer*, and so on. These outcomes, like the reasons above, also have numeric codes associated with them, which agents can select.

WrapUp is the state following a call, after the call has terminated. In the *WrapUp* state, agents continue to process information about a call by using one of the five available VTel **WrapUp** dialogs to enter reason and outcome codes.

The manner in which the **WrapUp** dialog is shown is dependent on the way VTel is configured to operate on your desktop. In some cases, VTel may contain a button to display the **WrapUp** dialog. In other cases, you might display the **WrapUp** dialog by selecting an option from the VTel menu bar. VTel can also be configured to automatically place you in the *WrapUp* state after a call has ended.

Once you have entered the *WrapUp* state, your desktop configuration will determine which of the VTel *WrapUp* code entry dialogs you will use.

Note:

While in the *WrapUp* state, the phone is considered busy. *WrapUp* call statistics are maintained in the CSR Daily Activity Report (for additional information, see [Statistics menu](#) on page 18).

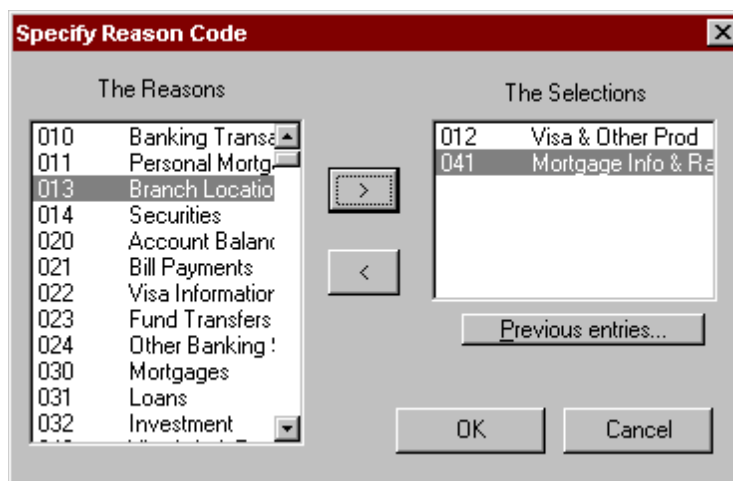
The **WrapUp** dialog is system specific. **WrapUp** dialog and functionality is determined by the System Administrator.

VTel has five **WrapUp** dialogs, described in this section:

- [Specify Reason Code dialog](#) on page 37
- [Specify Category & Reason Code dialog](#) on page 37
- [Specify Outcome Code dialog](#) on page 39
- [Specify Reason & Outcome Code dialog](#) on page 40
- [Specify Category, Reason, & Outcome Codes dialog](#) on page 41

Specify Reason Code dialog

The **Reason Codes** directory lets you specify the purpose of a customer's call or the intent of the work that you performed (for example, *Account Balance*, *Fund Transfers*, and so on). The **Specify Reason Code** dialog is shown in this illustration:



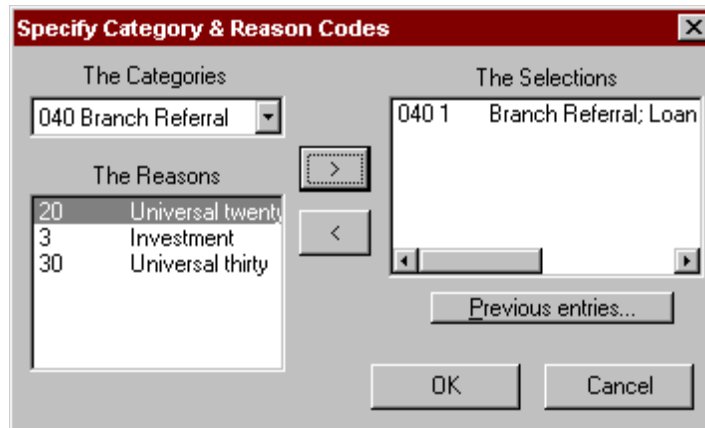
The **Reason Codes** directory contains reason codes followed by the text associated with each code (*013 Branch Location*, for example). The codes that are available for selection are always shown on the left; codes that have been selected are shown on the right (*041 Mortgage Info & Rates* has been selected in the illustration, for example). Double-click or use the arrow button to select a reason code. Selecting a reason code removes it from the **Reason Codes** directory and adds it to the **Selections** list. Repeat the procedure to reverse the reason code selection. Digits typed while the **Reason Codes** directory has focus will scroll the **Reason Codes** directory to match on the first matching digit.

Refer to [Assigning WrapUp codes](#) on page 42 for more information about assigning Reason codes. Refer to [Previous entries](#) on page 43 for information about the **Previous entries...** button.

Specify Category & Reason Code dialog

A *category code* is a number used to group or qualify a set of reason codes (*Insurance: Auto, Home, Life*, for example). The **Categories** drop down menu will help you use **WrapUp** more efficiently by presenting only the Reason codes that are associated with the Category you have selected.

The following illustration shows the **Specify Category & Reason Code** dialog:



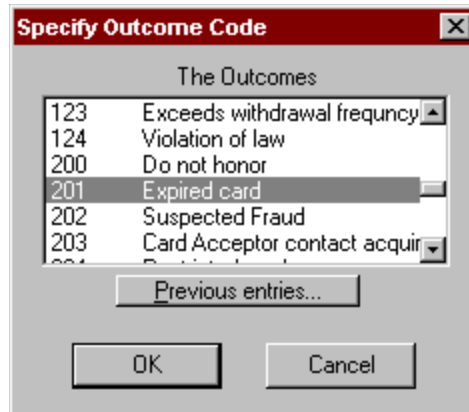
This dialog enables you to select a Category code and specify a Reason code for the call.

Use the drop down menu in the **Category** text box to view the codes and associated text for each available Category (*040 Branch Referral*, for example). The **Reason Code** directory is located below the **Category** text box. This directory contains the Reason codes followed by the text associated with each of the codes. The codes that are available for selection are always shown on the left; codes that have been selected are shown on the right as a combination of Category and Reason codes (in the illustration, *040 1 Branch Referral; Loan* has been selected, for example). Selecting a Reason code removes it from the **Reason Code** directory and adds it to the **Selections** list. Digits typed while the **Reason Code** directory has focus will scroll the **Reason Code** directory to match on the first matching digit.

Refer to [Assigning WrapUp codes](#) on page 42 for more information about assigning Category and Reason codes. Refer to [Previous entries](#) on page 43 for information about the **Previous entries...** button.

Specify Outcome Code dialog

Outcome codes are used to identify the result of the call. The **Specify Outcome Code** dialog is shown in this illustration:

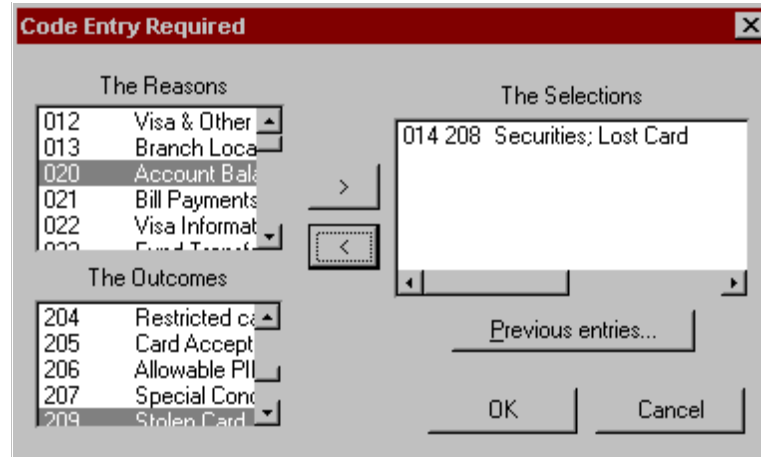


Use the scroll bar to view the entire **Outcome Codes** directory. The **Outcome Codes** directory contains the codes and the text associated with each Outcome code (*201 Expired card*, for example). Digits typed while the **Outcome Codes** directory has the focus will scroll the **Outcome Codes** directory to match on the first matching digit.

Refer to [Assigning WrapUp codes](#) on page 42 for more information about assigning Outcome codes. Refer to [Previous entries](#) on page 43 for information about the **Previous entries...** button.

Specify Reason & Outcome Code dialog

The **Reason & Outcome Code** dialog is shown in this illustration:



This dialog prompts you to assign a Reason and Outcome code to the call.

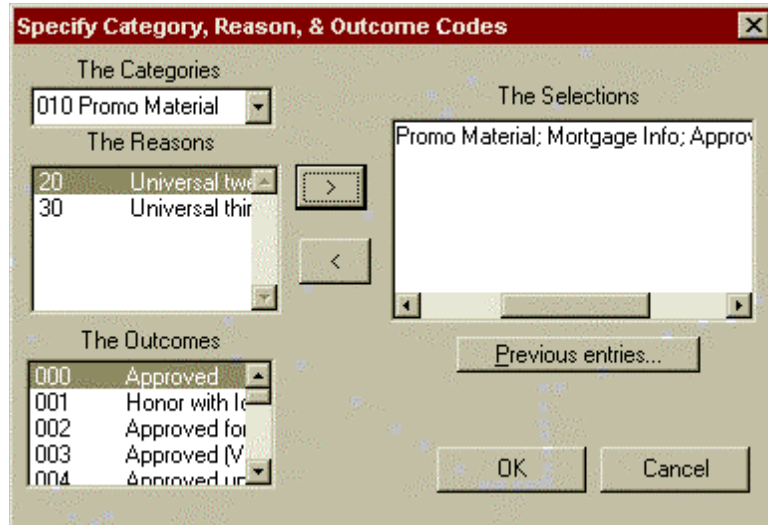
The **Reason Code** directory contains the Reason codes followed by the text associated with each code (for example, *020 Account Balance*). The **Outcome Code** directory is located below the **Reason Code** directory; it contains the codes and the text associated with Outcome codes (for example, *209 Stolen Card*). The codes that are available for selection are always shown on the left; codes that have been selected are shown on the right as a combination of Reason and Outcome codes (for example, *014 208 Securities; Lost Card*).

You must specify a code entry from both directories before entries can be added to the **Selections** list. Selecting Reason and Outcome codes removes them from the **Reason Code** directory and adds them to the **Selections** list. When the **Reason Code** directory or the **Outcome Code** directory has focus, digits typed will scroll that directory to match the code on the first matching digit.

Refer to [Assigning WrapUp codes](#) on page 42 for more information about assigning Reason and Outcome codes. Refer to [Previous entries](#) on page 43 for information about the **Previous entries...** button.

Specify Category, Reason, & Outcome Codes dialog

The **Specify Category, Reason, & Outcome Codes** dialog is shown in this illustration:



Using this dialog, you can select a call category, assign a reason for the call, and specify the outcome of the call.

Click on the **Category** drop down menu to view the codes and text associated with each available category (for example, *010 Promo Material*). The **Reason Codes** directory and the **Outcome Codes** directory are located below the **Category** text box. These directories also contain the codes followed by the text associated with each code (for example, *Mortgage Info, Approved*).

Category, reason, and outcome codes that are available for selection are always shown on the left; the codes that have been selected are shown on the right as a combination of category, reason, and outcome codes (for example, *010 10 005 Promo Material; Mortgage Info; Approved provisionally*). Reason codes and outcome codes that are selected from the **Reason Codes** directory and the **Outcome Codes** directory are removed from those directories and added to the **Selections** list. In each instance, digits typed while a directory has focus will scroll the directory to match on the first matching digit.

Refer to [Assigning WrapUp codes](#) on page 42 for more information about assigning category, reason, and outcome codes. Refer to [Previous entries](#) on page 43 for information about the **Previous entries...** button.

Assigning WrapUp codes

To assign Category, Reason, or Outcome codes:

1. Enter the WrapUp state (the manner in which you enter WrapUp varies depending on how VTel is configured to operate on your system).
2. Click on the scroll bar or drop down menu to view the contents of the **Category** or **Code Directory**.
3. Click on a code to make the selection. If more than one code directory exists, you must also select a code from that directory (for example, Category and Reason). Selecting a **Reason** or **Outcome** code removes it from the “available” directory and adds it to the **Selections** list.
4. Do one of the following to assign the applicable code to the **Selections** list.
 - Click the > button to move the code to the **Selections** list. To remove a code from the **Selection** list, select the code and click the < button.
 - Double-click on the code to move it to the **Selections** list. You can also double-click to remove a reason code from the **Selection** list.

Note:

The Category Reason Outcome dialog does not permit you to assign codes to the Selections list in this manner. You must use the > button.

5. After you have selected all of the codes that apply, do one of the following to dismiss the code entry dialog:
 - Click the **OK** button to save WrapUp code entries, dismiss the dialog, and complete call WrapUp.
 - Click the **Cancel** button to discard, interrupt, or dismiss the WrapUp code entry dialog.

Note:

Your System Administrator will determine the manner in which VTel is presented and how VTel performs at your desktop. WrapUp dialog variations, previous WrapUp code entries, and the number of Reason codes you can assign are also dependent upon the configuration parameters set by your System Administrator.

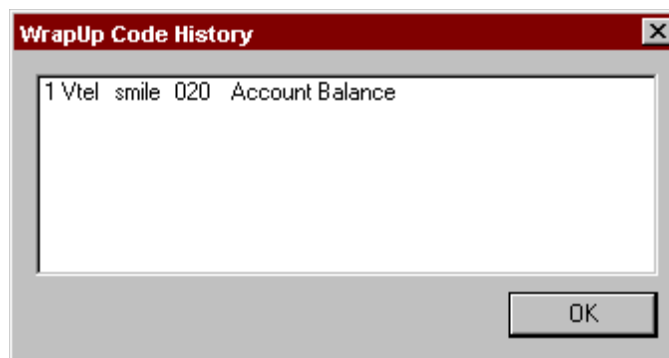
Previous entries

All variations of the WrapUp dialog have a button labeled **Previous entries....** If the call has been previously serviced by another agent, the **Previous entries...** button is enabled, indicating that there are additional WrapUp code entries that pertain to the call. Using this button, you can view these entries to gain historical information about the call.

When the **Previous entries...** button appears grayed, there are no previous WrapUp code entries associated with the call.

To view previous WrapUp code entries:

1. Click on the **Previous Entries...** button from within the **WrapUp Code Entry** dialog. The **WrapUp Code History** window displays previous WrapUp code entries, as shown in this illustration:



2. Click **OK** to dismiss the dialog and return to the WrapUp code entry dialog.

The **Wrapup Code History** window shows:

- a sequence counter, indicating how many times a call has been transferred (in the illustration, this is *1*)
- the application through which the wrapup code was entered (*VTel*)
- the login ID of the agent who entered the wrapup code (*smile*)
- the numerical wrapup code (*020*)
- the text associated with the wrapup code (*Account Balance*)

Note:

Your ability to view previous call information depends on the way VTEL is configured to operate on your system.

VTel WrapUp Functionality

Chapter 4: Troubleshooting/Error Messages

This chapter discusses common problems and error messages that may arise when using VTel. Once identified, these problems are usually easy to resolve.

Problem / Error Message Returned	Workarounds
Bad Login ID, user id too long	Reenter the user ID. There is a limit of 15 characters.
Login failed - bad password Login failed - missing password	Click OK and reenter the Telephony login ID password. If problems persist, contact the System Administrator.
Login ID does not exist	Click OK and reenter the Telephony login ID and any additional information normally entered in the Telephony login screen. If agent ID is unknown, contact the System Administrator.
VESP Error: Login Failed. Bad ID.	Click OK and reenter the login ID and additional information normally entered. If problem persists, contact the System Administrator.
Multiple Login ID	More than one login ID of the same name exists. Contact the System Administrator.
Phone login failed for ACD agent Equipment Already in use Login failed	Click OK and enter an alternate station ID.
Phone login failed for ACD agent User Busy	Terminate current phone call.
Could not open interface repository VESP error: Login Failed	Request the UNIX administrator to copy <code>vespidl.pk</code> from the Telephony working directory to the VTel working directory on the desktop.
Exit, Could not open implementation repository VESP error: Login Failed	Request the UNIX administrator to copy <code>vesp.imp</code> from the Telephony working directory to the VTel working directory on the desktop.

Troubleshooting/Error Messages

<p>Only one phone number. Login failed</p> <p>Hangup failed, bad state</p> <p>Bad queue specified. Bad parameter</p>	<p>Agent login ID is already in use.</p> <p>Click OK and choose Reset Phones.</p> <p>Reenter Telephony login ID and additional information normally entered in the Telephony login screen. You must also reenter correct queue in VTel login screen. If queue is unknown, contact the Switch Administrator.</p>
<p>Phone login failed for ACD agent. No queue specified. Service Unavailable. VESP Failure</p>	<p>Reenter Telephony login ID and additional information normally entered in the Telephony login screen. You must also reenter correct queue in VTel login screen. If queue is unknown, contact the Switch Administrator.</p>
<p>Agent phone busy at login. VESP Failure</p>	<p>Ensure that the phone is not in use. Reenter login ID and additional information normally entered in the login screen. If problem persists, contact the System Administrator.</p>
<p>Phone Busy</p>	<p>Terminate the current call. All line appearances for the agent being called are busy.</p>
<p>No phone number associated with name</p>	<p>Click OK and reenter the Telephony login ID and additional information associated with the login process. If problem persists, contact the System Administrator.</p>
<p>No Split Memory Phone login failed</p>	<p>This phoneset is not assigned to the split on the switch. Click OK and confirm/change station ID or queue. If problems persist, contact the Switch Administrator.</p>
<p>Destination not logged in or defined VTel error</p>	<p>You have attempted a blind transfer, consultative transfer, or conference call (in a non-EAS environment) to a virtual agent that is not logged in. Click OK and contact another agent.</p>
<p>Invalid or incomplete DS entry</p>	<p>The agent's channel data is either missing or corrupt. Check with the System Administrator to ensure the media channel is properly configured for this agent.</p>

Telephony error => Extension not defined or password incorrect	The agent's password is missing in IC Manager. Check with the System Administrator to assign a password to this agent on IC Manager.
The phoneset has handled both ACD and Direct calls at the same time. This impacts the desired phone state. Please "Reset Phones" now.	The agent's phoneset has handled ACD and Direct calls at the same time. To synchronize the softphone and the hardphone in this situation, perform the procedures in Reset phones on page 20.

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