Unify OpenScape Business

myAgent

User Guide

A31003-P3030-U125-14-7619

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As reseller please address further presales related questions to the responsible presales organization at Unify or at your distributor. For specific technical inquiries you may use the support knowledgebase, raise - if a software support contract is in place - a ticket via our partner portal or contact your distributor.

Our Quality and Environmental Management Systems are implemented according to the requirements of the ISO9001 and ISO14001 standards and are certified by an external certification company.

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Contents

1 History of Changes

Changes mentioned in the following list are cumulative.

Changes in V3R3 FR1

Impacted chapters	Change description
Displaying Tray Pop on Received Chat Messages on page 104	New chapters
Directories on page 68	Added info regarding user settings and license update.
Installing myAgent on page 17 Starting myAgent on page 18	Added the hostname option during the installation process.
Calls List on page 42	Agent/State column shows if the call was transferred.
Rescheduling a Callback on page 35	Added step where a specific agent can be selected to perform the callback.
Wallboard (Queue Details) on page 47	Updated column names.
Hot Keys on page 110 Miscellaneous on page 112	Configuration is not migrated on system update.
Presence Status on page 87 Attendant Buttons on page 78	Updates for user pictures with presence status.

Changes in V3R3

Impacted chapters	Change description
Presence Status on page 87 Changing a Subscriber's Queue Status on page 89	Updates and new chapter on myAttendant license and user status.

Impacted chapters	Change description
Opening or Closing the Live Calls Panel on page 24 Sorting Live Calls on page 24 Grouping Live Calls on page 25 Forwarding a Fax to a Queue on page 33 Opening or Closing the Internal Directory Panel on page 70 Filtering the Internal Directory on page 72 Opening or Closing Instant Messages on page 73 Sending an Instant Message from Internal Directory on page 74 Send an Instant Message from Dial/Search on page 74 Sending an Instant Message from Attendant Buttons on page 75 Displaying User Pictures on Attendant Buttons on page 100 Enabling CallMe Service on page 90 Panel Functions on page 92 Activating or Deactivating Main Window Pop Up on Call Termination on page 102 Displaying Tray Pop on Inbound Calls on page 103 Displaying Tray Pop on Outbound Calls on page 103 Activating or Deactivating Screen Pop Taking Focus on page 105 Activating or Deactivating Screen Pop for Alarm Condition on page 106 Playing Alarm Tones for Alarm Condition on page 106	New chapters

Impacted chapters	Change description
User Interface Elements on page 12 First Steps on page 21 Functions for Agents on page 22 Functions for Supervisors or Administrators on page 51 Directories on page 68 Instant Messaging on page 73 Attendant Buttons on page 78 Panel Functions on page 92 Presence Status on page 87 Configuration on page 96	UI refresh updates in chapters and subchapters.
Types of Topics on page 11	Updated all chapter titles to gerund form.
Fax and Email Processing on page 28	Renamed faxes and e-mails to fax and email respectively, in all related chapters.
History of Improvements on page 10	Introduced history of improvements chapter.
Fax and Email Processing on page 28	Removed OS Office mention.

Changes in V3R2

Impacted chapters	Change description
Deleting an Instant Message on page 76 Leaving an Instant Message Conversation on page 76	New chapters for deleting instant messages and leaving a conversation.
User Interface Elements on page 12	Renamed available and wrap up status.

Changes in V3R1 FR1

Impacted chapters	Change description
Copying Attendant Buttons from a User on page 108	Added note for not allowing to copy personal contacts.

Changes in V3R1

Impacted chapters	Change description
Copying Attendant Buttons from a User on page 108	New chapter
Caller History on page 46	New chapter

Changes in V2R7

Impacted chapters	Change description
How to Install myAgent	Updated the installation procedure
Displaying Queue Details How to Display Queue Details (Wallboard)	Added information about visual wallboard

Changes in V2R6

Impacted chapters	Change description
Directories	Group name support
Presence Status	Note about hiding sick status

1.1 History of Improvements

Changes in V3R3 FR1

Service case ID	Date of change	Description of change	Impacted chapters
PRB000072382	19 Mar 2024	Added note regarding hotkeys configuration across applications.	Hot Keys on page 110

Changes in V3R3

Service case ID	Date of change	Description of change	Impacted chapters
PRB000064662, PRB000065829	05 Jul 2023	Added information regarding limitation with myAgent hot desking.	Starting myAgent on page 18
PRB000064157	17 Jul 2023	Added supported image formats.	Uploading a Picture on page 99
PRB000072484	25 Jan 2024	Added explanation about quick search function.	Directories on page 68

2 About this Documentation

This section contains some introductory information on this documentation.

2.1 Types of Topics

The types of topics include concepts and operating instructions.

Type of topic	Contents	Title
Concept	Explains the "What".	Without a verb as in "*Queue Details*" or with a gerund as in *Displaying Queue Details*.
Step-by-step instructions	Describes task-oriented application cases – i.e., the "How" – and assumes familiarity with the associated concepts.	Starts with a gerund as in *Swapping Panels*.

2.2 Display Conventions

This documentation uses a variety of methods to present different types of information.

Type of information	Presentation	Example
User Interface Elements	Bold	Click **OK**.
Menu sequence	>	**File** > **Exit**
Special emphasis	Bold	**Do not delete** Name.
Cross-reference text	Italics	You will find more information in the topic*Network*.
Output	Monospace font, e.g., Courier	`Command not found.`
Input	Monospace font, e.g., Courier	`Enter` LOCAL as the file name.
Key combination	Monospace font, e.g., Courier	<Ctrl>+<Alt>+<Esc>

3 Introduction

This document is intended for the users of the myAgent application and it describes its installation, configuration and operation.

3.1 myAgent

myAgent is a convenient application for the distribution and handling of calls, fax and email to and by the agents of a Contact Center.

myAgent provides the following features:

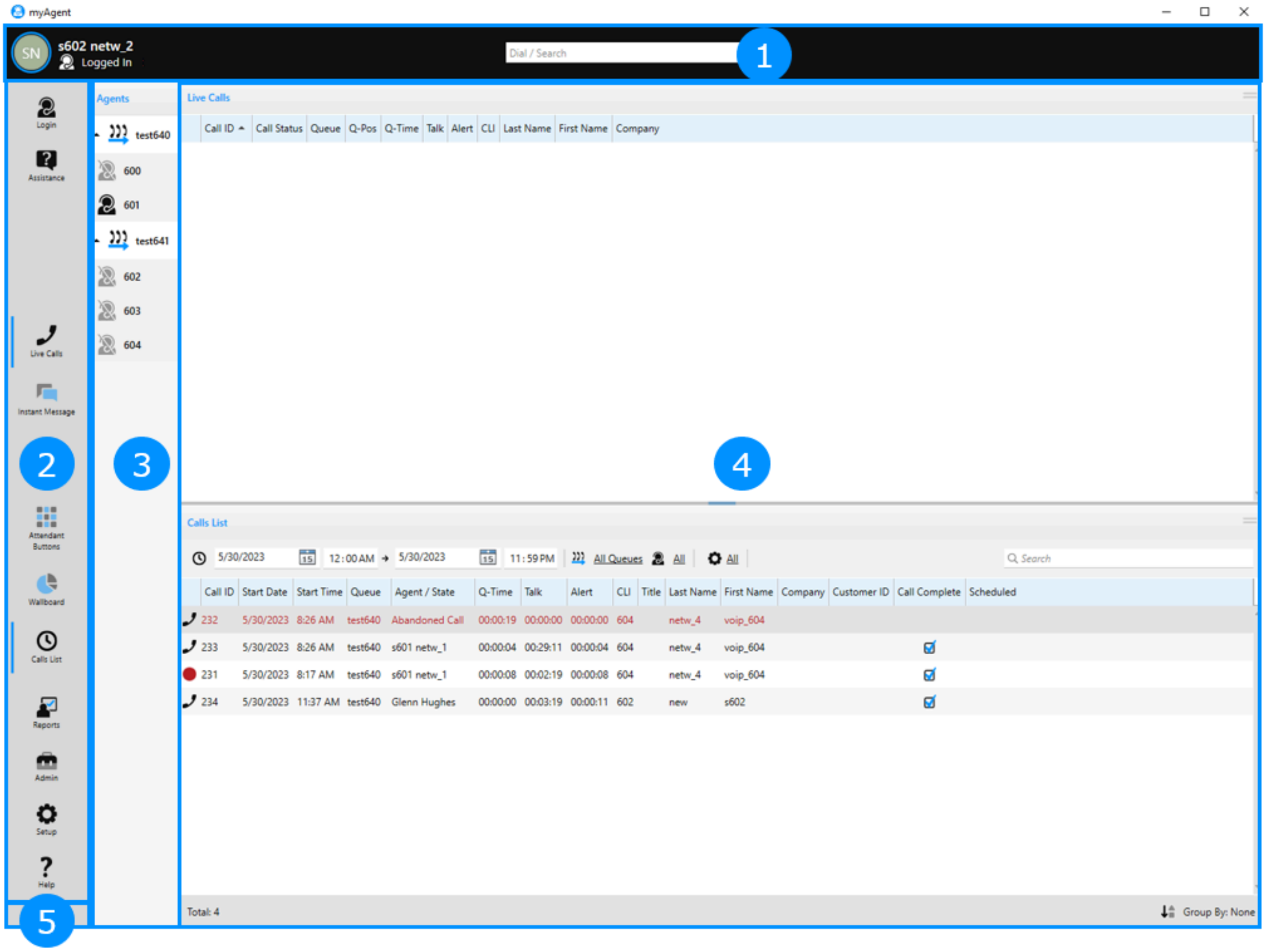
- Processing of
  - Calls
  - Fax
  - email
- Callback function for agents
- Displaying and changing the agent status
- Displaying and changing the presence status of internal subscribers of the communication system
- Real-time presentation of queues
- Recording of calls, if activated in the communication system
- Instant messaging
- Request for assistance through
  - Call Supervision (depending on country)
  - Overriding calls
  - Instant Messaging
- Integration of the internal directory, external directory, the external offline directory (LDAP), and Outlook Contacts for searches by name
- Creation of reports based on predefined report templates

Depending on the authorization level assigned to a Contact Center agent, either a standard set of functions (agent) or an advanced set of functions (Supervisor or Administrator) is available to the agents in myAgent (see *Agent Functions Independent of the Authorization Level*).

3.2 User Interface Elements

The user interface of myAgent consists of the main window with different icons and lists.

The main window consists of the following elements:



1) Top bar displaying:

- The agent's profile picture, first name, last name and current status.
- Dial / Search field.

2) Sidebar with the following options:

Symbol	Action	Description
	Login **Logout**	Login to queues Logout of queues
	Assistance	Open the **Assistance** window to request assistance
	Work Time	Request work time (60 seconds increments)
	Break	Go on a break
	Receive Calls	Become available to receive calls again
	Live Calls	Open or close the **Live Calls** panel

Symbol	Action	Description
	Instant Message	Open the **Instant Message** window
	Internal Directory	Open or close the **Internal Directory** panel
	Attendant Buttons	Open or close the **Attendant Buttons** panel
	Wallboard	Open or close the **Wallboard** panel
	Calls List	Open or close the **Calls List** panel
	Reports (Only for agents with the Supervisor or Administrator authorization level)	Opens the **Reports** window to create reports for calls, queues, agents, grades of service (GOS) and wrapup reasons in myAgent
	Admin (Only for agents with the Supervisor or Administrator authorization level)	Open WBM
	Setup	Open the **Setup** window to configure myAgent
	Help	Bring up the online help

When there is not enough space to show all sidebar options, the double ellipsis icon appears and the bottom of the sidebar. You can click on this icon to display a list of options that did not fit.

A blue vertical line to the left of a sidebar option indicates that the corresponding panel is open in the main window of myAgent.

A light blue vertical line to the left of a sidebar option indicates that the corresponding panel is open in a separate application window.

3) **Agents Binding List**: Shows the assignment of agents to queues as well as the current agent status.

4) Panels area: Displays up to two of the following panels:

- **Live Calls**

  Shows details on the current calls, fax and email in real time.
- **Instant Message**

  Allows the exchange of texts as instant messages, while sent and received messages are displayed as conversations in the **Instant Message** window.
- **Internal Directory**

  Shows details of the internal directory contacts.
- **Attendant Buttons**

  Provides buttons for fast access to internal subscribers.
- **Wallboard**

  Shows one of the following (switchable via the panel's options):

  – **Wallboard** (default): Call, fax and email statistics for the current day in tabular form.
  – **Grade of Service** graph: Call, fax and email statistics for the current day in graphical form.
  – **Average Times** graph: Statistical details on the waiting times and talk/reading times for the queued calls, fax and email on the current day in a graphical chart.
- **Calls List**

  Shows details on the previous calls, fax and email.

5) System bar with information on the software version of myAgent.

When myAgent starts, the panels area displays the **Live Calls** and **Wallboard** panels.

You can open or close panels as you want. However, the panels area of the myAgent's main window cannot display more than two panels at a time.

If the panels area already displays two panels, then any new panel that opens in the main window of myAgent, will replace an existing panel in the panels area. The panel that is replaced is the one with the lowest display priority. The display priority of a panel is the order in which a panel's icon appears in the sidebar. The **Live Calls** panel has the greatest display priority and cannot be automatically replaced by another panel in the main window of myAgent.

If you want to have more than two panels open at the same time, some of them must be opened in a separate application window.
By default, the **Internal Directory** panel, opens in a separate window. You can also pop in a panel that is currently displayed in the panels area and have it opened in a separate application window, as described in Pop In a Panel on page 92.

Tooltips

Tooltips are tiny windows in which myAgent displays more information on certain objects of the graphical user interface such as icons, for example. A tooltip appears when you let the mouse pointer hover over the corresponding object for some time.

Related concepts

Call Processing on page 25
Call Functions on page 36
Attendant Buttons on page 78

4 Installing and Starting myAgent

This section provides you with details on the procedures for installing and starting myAgent and for updates and upgrades.

NOTICE:

Please make sure that you refer to the current notes in the `ReadMe first` file, which is located in the storage directory of the install files.

4.1 Installing myAgent

Prerequisites

The install file `CommunicationsClients.exe` is available to you.

NOTICE: Please make sure that you refer to the notes in the `ReadMe first` file.

Step by Step

1) Run the `CommunicationsClients.exe` install file.

2) If the **User Account Control** window appears with the message `An unidentified program wants access to your computer`, click **Allow**.

3) Enter the IP address or DNS name (hostname) of your OpensScape Business server and click **Next**.

4) After validation of IP address, the installer will check if .NET 4.8 or latest is available and install it if not.

5) Click on **myAgent** to mark it for installation.

Clicking on an application will cycle between actions:

Symbol	Function
	**Install**
	**Repair**
	**Remove**

6) If you want, change the installation folder in the **Install To:** field.

7) Click **Install**.

8) Follow the instructions of the installation program.

Related tasks

Starting myAgent on page 18
Uninstalling myAgent on page 19

4.2 Starting myAgent

Prerequisites

myAgent is installed on your PC.

You are configured as agent in the communication system.

Step by Step

1) Click **Start** > **Program Files** > **Communication Clients** > **myAgent**. You will then be presented with the login screen.
2) Enter your user name in the **Username** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.

   NOTICE: A know limitation of the system is that, when using hot desking, no other clients should be used for both extensions involved in hot desking.

3) Enter your password, which must consist of only digits, in the **Password** field. The default password when logging in for the first time is `1234`. If you have any questions, please contact the administrator of your communication system.

   NOTICE: If the wrong password is entered five times, access to all contact center and UC Suite clients will be locked. Unlocking is only possible by the administrator of your communication system.

4) If you want myAgent to remember your credentials in the future, enable the **Save Password** check box.

   NOTICE: You should use the automatic login only if you are certain that no one else has access to your Windows user account. Otherwise, unauthorized users could, for example, potentially access your voicemail and fax messages or redirect your station number to external toll-based destinations.

5) Enter the IP address or DNS name of your application server in the **Server Address** field.
6) If you want to change the language of the User Interface, click on the current preferred language at the bottom of the login screen and select one from the list.
7) Click on **Login**.

   INFO: When you start myAgent for the first time, you will be asked to change the password. This prompt is not displayed if you have already changed the password via myAttendant, myPortal for Desktop, myPortal for Outlook or via the phone menu of the voicemail box.

Enter your current password in the **Old password** field (the default password when logging in for the first time is `1234`).

Enter your new password, which must consist of only digits and include at least six digits, in the **New password** and **Confirm password** fields.

The password applies to myAgent, myReports, myAttendant, myPortal for Desktop, myPortal for Mobile, myPortal for OpenStage, myPortal for Outlook and Fax Printer as well as phone access to your voicemail box.

Next steps

Log into the queue(s) to be available for calls, fax and email.

Related tasks

Installing myAgent on page 17
Logging in a Queue on page 22

4.3 Uninstalling myAgent

Step by Step

1) Close myAgent.

> **NOTICE:** Please make sure that you refer to the notes in the `ReadMe first` file.

2) Select one of the following options:

- Windows XP: Double-click in the **Control Panel** on **Software**.

  Click on the **Communications Clients** item and then on **Edit**.
- Windows Vista: Double-click in the **Control Panel** on **Programs and Features**.

  Click on **Edit** in the context menu of the **CommunicationsClients** entry.
- Windows 7: Click in the **Control Panel** on **Programs**.

  Click on **Programs and Features**.

  Click on **Edit** in the context menu of the **Communications Clients** entry.

3) Activate the radio button **Modify** and click **Next**.

4) Select the **myAgent** feature to uninstall it and click **Next**.

5) Follow the instructions of the uninstallation program.

If a message about deleting shared files appears, click on **No to all**.

Related tasks

Installing myAgent on page 17

4.4 Automatic Updates

Automatic updates ensure that myAgent is always kept up-to-date with the latest version.

If myAgent determines that there is a newer version than the one currently running, a corresponding message will be displayed. The automatic update is performed on exiting myAgent.

4.4.1 Performing Automatic Updates

Prerequisites

You have received a message such as: `Client update available. Please wait while the update is done. Please close the following programs to continue the update: [...].`

Step by Step

Close the named programs.

Next steps

Restart myAgent after the automatic update.

5 First Steps

The First Steps describe the recommended actions to be taken right at the beginning.

Logging into Queues

Log into the queue(s) to be available for calls, fax and email.

Custom Configuration

You can configure myAgent to suit your requirements, e.g., to customize its behavior for calls. For details on the various configuration options, see *Configuration*.

5.1 Logging in a Queue

Step by Step

1) Click on **Login** in the sidebar.
2) In the **Select your extension** drop-down list, select the station number of the phone you intend to use as an agent and click on **Login**.

> **NOTICE:** If you are logged into another application in addition to myAgent, you can log into a queue only with the phone number with which you logged into myAgent (own extension).

6 Functions for Agents

A number of convenient functions for handling calls, fax and email are offered to Contact Center agents with the Agent authorization level via the Contact Center client myAgent.

6.1 Queues

A queue lines up incoming calls, fax and email sequentially based on their time of arrival and distributes them to available agents.

An incoming call, fax or email to a queue is normally forwarded to the agent whose last call lies furthest in the past. It is also possible to define other distribution rules (based on the different skill levels of agents, for example). If all agents are busy, any additional calls, fax and email are placed in the queue and then distributed to the next free agent based on their priority and the waiting time.

Statistical information

The **Wallboard**, **Grade of Service** and the **Average Times** graphs provide statistical information on queues. Agents with the agent authorization level can retrieve information on the queues to which they are assigned.

6.1.1 Logging in a Queue

Step by Step

1) Click on **Login** in the sidebar.

2) In the **Select your extension** drop-down list, select the station number of the phone you intend to use as an agent and click on **Login**.

> **NOTICE:** If you are logged into another application in addition to myAgent, you can log into a queue only with the phone number with which you logged into myAgent (own extension).

Related tasks

Starting myAgent on page 18

6.1.2 Logging out of a Queue

Step by Step

Select one of the following options:

- If you are not conducting a call at present and are not receiving a contact center call, click on **Logout** in the sidebar.

- If you are conducting a call at present or receiving a contact center call, close myAgent.

> **NOTICE:** Any pending contact center call for you will be returned to the queue when you close myAgent.

6.2 Live Calls

The **Live Calls** panel shows details on the current calls, fax and email in real time.

As an agent you can see the calls, fax and email of every queue to which you are currently assigned. The following information is displayed:

- **Call ID**

  A unique number identifying a call, fax or email. It is increased by one with every call, fax and email.
- **Call status**
  - For a call: shows whether the caller is still waiting or on the phone (talking).
  - For a fax or email: shows whether the fax or email has already been read.
- **Queue**

  Name of the queue.
- **Q-Pos**

  Position in the queue.
- **Q-Time**

  Time spent waiting, in seconds.
- **Talk**
  - For a call: Time spent talking, in seconds
  - For a fax or email: time spent, in seconds, from the opening of the fax or email until the screen pop is closed
- **Alert**
  - Time the call is on queue before being answered by an agent.
- **CLI**
  - For a call: incoming contact center calls are matched against the various system directories
  - For a fax or email: incoming contact center email are matched against the various system directories
- **Last Name**
  - For a call: Last Name of the caller, if available with the phone number in the external directory
  - For a fax or email: Last Name of the sender, if available with the fax number or email address in the external directory

- **First Name**
  - For a call: First Name of the caller, if available with the phone number in the external directory
  - For a fax or email: First Name of the sender, if available with the fax number or email address in the external directory
- **Company**
  - For a call: company name of the caller, if available with the phone number in the external directory
  - For a fax or email: company name of the caller, if available with the fax number or email address in the external directory

The list of **Live Calls** can be sorted.

Calls and email for which the waiting time in the queue has exceeded the alarm threshold value are displayed in the **Live Calls** panel in red.

6.2.1 Opening or Closing the Live Calls Panel

Details on the current calls, fax and email are displayed in the **Live Calls** panel.

When myAgent first starts, the panel is open by default.

Step by Step

1) To close the **Live calls** panel:

a) If the panel is open in the main window of myAgent, click on **Live calls** in the sidebar.

b) If the panel is open in a separate window, click X in its top right corner.

2) To open the **Live calls** panel, click on **Live calls** in the sidebar. The panel opens in the main window of myAgent.

Related tasks

Pop Out a Panel on page 92
Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94

6.2.2 Sorting Live Calls

Prerequisites

The **Live Calls** panel is open; see Opening or Closing the Live Calls Panel on page 24.

An arrow next to a column header in the **Live Calls** panel indicates that the column is used for sorting the list of live calls. It also indicates whether the list is sorted in ascending or descending order.

Step by Step

1) To change the column that is used for sorting, click on the column header that you want to use, e.g., **Last Name**.

2) If you want to reverse the sort order, click on the column header again.

6.2.3 Grouping Live Calls

Prerequisites

The **Live Calls** panel is open; see Opening or Closing the Live Calls Panel on page 24.

Step by Step

1) Hover over the top of the **Live Calls** panel.

A toolbar appears.

2) Open the panel's toolbar. see Opening a Panel's Options Menu on page 94.

3) Select one of the available grouping options:

- **None**
- **Type**
- **Queue**
- **Call Status**
- **CLI**
- **First Name**
- **Last Name**
- **Company Name**

Live calls are grouped according to the selected option.

6.3 Call Processing

You can use myAgent to answer a call, to enter or look up information on the caller, and to assign a call to a specific category (e.g., Orders, Claims, Service, etc.) after completing the call.

During call processing you can:

- Add contact details for a caller:

  You can save the following contact details for a caller for calls with a transmitted call number: **Title**, **First Name**, **Last Name** and **Company**. These details are saved in the external directory and subsequently displayed in the myAgent Inbound Call screen pop for calls from the same number as soon as the external directory has been updated in the client. In this case, the caller's phone number is assigned and set as the **Business 1** phone.
- View notes on the current caller or save notes yourself for future calls.

- View the caller history:

  The caller history shows details on all previous calls of the same caller with **Inbound call number**, **Caller phone number**, **Start Date**, **Start Time**, **Type of Call** and **Queue number**. The type of call is represented by a symbol (inbound call, recorded call, etc.).
- Perform a wrapup:

  During the wrapup (work time period), you can assign incoming calls to a specific category (e.g., Orders, Claims, Service, etc.). The assignment is made after completing the call (during the work time period) by selecting a wrapup reason. An agent with the Supervisor or Administrator authorization level can define the wrapup reasons intended for a queue in the WBM and organize them into groups. When doing so, they can also define whether the specification of a wrapup reason is mandatory. You can also specify multiple wrapup reasons for a call. By evaluating the wrapup reasons, agents with the Supervisor or Administrator authorization level, for example, track the success of a promotion.

The primary aids for processing calls are the myAgent Inbound Call screen pop and the list of **Live Calls**.

Screen Pop for Calls

When an inbound call reaches an agent, the screen pop opens automatically for that agent, provided an agent with the Supervisor or Administrator authorization level has configured this feature in the WBM. In addition, the agent can also open the screen pop for previous calls in the caller list. The screen pop of a myAgent inbound call contains the following items for processing calls in addition to the buttons for call functions:
Information on the call:

- **Queue**, **Call number** of the caller (if transmitted), **Call ID** and possibly a **Callback Number**.
- Fields for contact details.
- **Assistance** option
- **Play** button
- **Wrapup code**
- **Notes** from agents about previous calls from the same caller
- **Caller History**

Related concepts

User Interface Elements on page 12
Call Functions on page 36

6.3.1 Answering a Call

Step by Step

Select one of the following options:

- Click on **Accept and start working on this call** in the screen pop of the incoming myAgent call.
- Click on **Answer** in the tray pop of the incoming myAgent call.

6.3.2 Editing Contact Details of the Current Caller

Step by Step

1) Click on **Rename** in the screen pop of the incoming myAgent call.
2) Enter the **Title**, **First Name**, **Last Name** and **Company** .
3) Click on **Save**.

6.3.3 Adding a Note for the Current Caller

Step by Step

1) Click on **Notes** in the screen pop of the incoming myAgent call.
2) Enter the desired text in the **Add Note** field.
   Once you enter a note the **+Add Note** button is enabled.
3) Click on **+Add Note**.

6.3.4 Editing a Note for the Current Caller

Step by Step

1) Click on **Notes** in the screen pop of the incoming myAgent call.
2) Search for or locate the note you want to edit and double click on it.
3) Edit the note and press `Enter`.

6.3.5 Displaying Caller History

Step by Step

Click on **Caller History** in the screen pop of the incoming myAgent call.

6.3.6 Completing a Call

Step by Step

1) Select one of the following options:
   - Click on **Hang Up** in the screen pop of the incoming myAgent call.
   - Click on **Hang Up** in the tray pop of the incoming myAgent call.
2) If relevant, enter a wrapup reason; see Specifying a Wrapup Reason on page 28.
3) Click on **Close** in the screen pop of the incoming myAgent call.
   The call is marked as ☑ completed in the **Call Complete** column of the **Call Lists** panel.

6.3.7 Specifying a Wrapup Reason

Prerequisites

Simple wrapup or multiple wrapup has been enabled for the relevant queue.

Step by Step

1) Click on **Wrapup code** in the screen pop of the incoming myAgent call.
2) Select one of the following options:

If	Then
Simple wrapup is enabled for the relevant queue.	Select the check box for the desired wrapup reason.
Multiple wrapup has been enabled for the relevant queue.	Click on the desired group of wrapup reasons. Select the check box(es) for the desired wrapup reason(s). If you want to specify a wrapup reason of another group, repeat the two steps.

3) Click on **Close**.

6.3.8 Becoming Available after a Missed Call

Step by Step

Click on **Receive Calls** in the **Missed Call** screen pop.

6.4 Fax and Email Processing

You can use myAgent to receive email and fax and to assign them to specific categories (orders, complaints, service, etc.).

When processing fax and email, you can

- View the sender history in Caller History.

  All previous fax and email from the same sender are displayed with the **Date / Time** and **Subject**.
- Perform a wrapup:

  During the wrapup, you can assign the received fax and email to specific categories (orders, complaints, service, etc.). The assignment is made during the wrapup period by selecting a wrapup reason. An agent with the Supervisor or Administrator authorization level can define the wrapup reasons intended for a queue in the WBM and organize them into groups. When doing so, he or she also defines whether the specification of a wrapup reason is mandatory. You can specify multiple wrapup reasons for received fax and email. By evaluating the wrapup reasons, agents with the

Supervisor or Administrator authorization level, for example, track the success of a promotion.

- Flag a fax or email for follow-up.

  You can set a time after which the fax or the email will be delivered to you again.

The primary aids for processing fax and email are **Live Calls**, **Calls List** panels, the **Inbound Fax** and **Received Email** screen pops and the **Live Calls**.

Screen Pop for Fax

When an inbound fax reaches an agent, the **Inbound Fax** screen pop opens automatically for that agent, provided an agent with the Supervisor or Administrator authorization level has configured this feature in the WBM. The **Inbound Fax** screen pop contains the following items for processing fax:

- Information on the fax:

  Queue, **Phone number** of sender (if transmitted), **Date / Time**, **CC** (additional recipients of the fax, if any) and **Subject**.
- **Wrapup** button
- **Dial** button
- **Reschedule** button
- **Answer**
- **Reply**
- **History**

The contents of the fax is displayed on the screen as a PDF or TIFF file. Your administrator can configure whether the fax message is stored as a PDF or a TIFF file on a is stored basis.

Screen Pops for Email

When an inbound call reaches an agent, the **Received Email** screen pop opens automatically for that agent, provided an agent with the Supervisor or Administrator authorization level has configured this feature in the WBM. The **Received Email** screen pop contains the following items for processing email:

- Information on the email:

  Queue, **From** (email address of the sender), **Date / Time**, **CC** (additional recipients of the email, if any) and **Subject**.
- Email text
- **Attachments**
- **Wrapup** button
- **Dial** button
- **Reschedule** button
- **Answer**
- **Reply**
- **History**

6.4.1 Viewing a Fax

Prerequisites

Step by Step

1) Click on **Accept and start working on this call** in the screen pop of the fax message.
2) Click on the **Fax Message** tab.

   The contents of the fax message are displayed.

6.4.2 Accepting an Email

Step by Step

Click on **Accept and start working on this call** in the in the screen pop of the email message.

6.4.3 Replying to a Fax

Prerequisites

You have accepted the fax, but not finished processing it as yet.

Step by Step

1) Click on the **Reply** tab in the screen pop of the fax message.
2) Search for the desired contacts in the **Recipients** field and click **OK**.
3) If available, select a cover page from the **Cover Page** drop-down list.
4) Press **Send**.
   You receive a confirmation message **Your fax has been spooled**.

6.4.4 Replying to an Email

Step by Step

Click on the **Reply** tab in the screen pop of the email.

6.4.5 Completing a Fax

Prerequisites

You have finished processing the fax.

Step by Step

1) Select the check box **This call has been completed** in the screen pop of the fax message.

2) Select a wrapup reason from the drop-down list in the **Wrapup code** tab.
3) Click **Close**.

6.4.6 Completing an Email

Prerequisites

You have finished processing the email.

Step by Step

1) Select the check box **This email is completed** in the screen pop of the email.
2) Click **Close**.

6.4.7 Scheduling a Fax for Follow-Up

Prerequisites

You have accepted the fax, but not finished processing it as yet.

Step by Step

1) Click on **Reschedule this call for a later time** in the screen pop of the fax message.
2) Check the **Reschedule for another time** check box in the **Complete or Reschedule Call** pop up window.
3) Select date, time, queue and agent to handle the fax message. If you are going to handle the fax message, click on **Assign to me**.
4) Click **OK**.

6.4.8 Scheduling an Email for Follow-Up

Prerequisites

You have accepted the email, but not finished processing it as yet.

Step by Step

1) Click on **Reschedule** in the screen pop of the email.
2) Select **Date** and **Time**.
3) Click **OK**.
4) Click **Close**.

6.4.9 Displaying the History of the Current Fax Sender

Step by Step

Click on the **Caller History** tab in the screen pop of the fax message.

6.4.10 Displaying the History of the Current Email Sender

Step by Step

Click on the **Caller History** tab in the screen pop of the email.

6.4.11 Specifying a Wrapup Reason for a Fax

Prerequisites

Simple or multiple wrapup has been enabled for the relevant queue.

Step by Step

1) Click on **Wrapup code** in the in the screen pop of the fax message.

2) Select one of the following options:

If	Then
Simple wrapup is enabled for the relevant queue.	Select the check box for the desired wrap up reason.
Multiple wrapup has been enabled for the relevant queue.	Click on the desired group of wrapup reasons. Select the check box(es) for the desired wrapup reason(s). If you want specify a wrapup reason of another group, repeat the two steps.

3) Click **Close**.

6.4.12 Specifying a Wrapup Reason for an Email

Prerequisites

Simple wrapup or multiple wrapup has been enabled for the relevant queue.

Step by Step

1) Click on **Wrapup code** in the in the screen pop of the email.

2) Select one of the following options:

If	Then
Simple wrapup is enabled for the relevant queue.	Select the check box for the desired wrap up reason.
Multiple wrapup has been enabled for the relevant queue.	Click on the desired group of wrapup reasons. Select the check box(es) for the desired wrapup reason(s).

If	Then
	If you want specify a wrapup reason of another group, repeat the two steps.

3) Click **Close**.

6.4.13 Forwarding a Fax to a Queue

Step by Step

1) Click **Forward this call to another queue**.

2) Select a queue from the drop-down list.

6.4.14 Sending an Email on behalf of Queue

Prerequisites

A **Return Email Address** must be entered in the queue setup.

Step by Step

1) Click on **Agents** in the main window of myAgent.

2) Right-click on the queue in myAgent and click on **Send Email**. The system will pop up a new email ready to be completed and sent by the agent.

6.5 Work Time

The work time enables you to finish any administrative tasks that may be required after completing a call or reading a fax or email before you receive the next call, fax or email.

On ending a call (fax or email) and closing the associated screen pop, you are automatically in the default work time. After this time period expires, you automatically return to the logged in state. You can optionally extend the work time, more than once if needed. In order to be available for new calls, fax and email again, you must first terminate the ongoing work time or wait for it to expire.

The maximum supported work time is 999 seconds.

6.5.1 Extending Work Time

Step by Step

Click on **Work Time** in the sidebar.

> **NOTICE:** If required, you can repeat this step as many times as needed, to obtain additional work time.

The work time set for you in this queue is increased.

6.5.2 Ending Work Time

Step by Step

Click on **Receive Calls** in the sidebar.

6.6 Break

On starting a break, you specify the type and scheduled duration of your break. In order to be available for calls, fax and email again, you must end the current break.

Break is not displayed by default in the sidebar. It has to be configured by an agent with the Supervisor or Administrator authorization level, via the VSAdmin in WBM.

The available types of breaks and break duration are also configured by an agent with the Supervisor or Administrator authorization level, via the VSAdmin in WBM. The maximum supported break duration is 90 minutes.

6.6.1 Starting a Break

Step by Step

1) Click on **Break** in the sidebar.
The **Select break type** pop up window appears.

2) Click on the down arrow and select the desired type of break from the list.

3) Enter the desired duration of the break in the **minute(s)** field.

4) Click on **OK**.

6.6.2 Ending a Break

Step by Step

Click on **Receive Calls** in the sidebar.

6.7 Agent Callback

Agent callback enables a caller in the queue to leave a voicemail (callback request) for agents. The voicemail retains the position of the original caller in the queue. As soon as an appropriate agent becomes free, that agent receives a call, hears the voicemail left by the caller, and can then call back that caller.

If the agent reaches the caller, he or she can flag the callback as completed. If the caller cannot be reached, the agent can schedule a timed reminder for the callback to be repeated. At the time of execution, it is placed back in the associated queue.

In order for an agent to receive callbacks, this feature must be enabled in his or her agent assignment.

If a preferred agent has been set for a caller, an attempt is first made to route the callback requests of that caller to the preferred agent. If the preferred agent is not available, the callback request is forwarded to any available agent.

6.7.1 Making a Callback

Prerequisites

You have accepted the callback call and listened to the message of the caller.

Step by Step

Click on **Dial**, followed by **Dial**.

6.7.2 Closing a Callback

Prerequisites

You have made a callback call and reached the caller.

Step by Step

1) Click on **Hang Up** in the screen pop of the incoming myAgent call.
2) If relevant, enter a wrapup reason; see Specifying a Wrapup Reason on page 28.
3) Click on **Close** in the screen pop of the incoming myAgent call.

6.7.3 Rescheduling a Callback

Prerequisites

You have called back the caller, but not yet reached him or her.

Step by Step

1) Click on **Hang Up** in the screen pop of the incoming myAgent call.
2) Click **Reschedule**.
3) Select the desired **Date** and the desired **Time**.

4) Optionally, select the desired agent to perform the callback call and click on **OK**. If no agent is selected, the rescheduled callback will be randomly routed to an available agent.
5) Click **Close**.

6.8 Call Functions

You can use myAgent to make calls, place calls on hold or transfer calls.

You can usually perform call functions in the myAgent Inbound Call screen pop as well as the Dial / Search field of the myAgent main window.

Placing a Call on Hold

The party placed on hold hears music on hold or an announcement until you resume the call.

Transferring a Call

You can configure the following methods for transferring a call to an agent, a queue or a subscriber:

- Blind transfer (also called an unscreened transfer):

  You can transfer the call without an answer from the subscriber at the destination of the transfer.
- Supervised transfer (consultation transfer):
  - The pop up: `Does the other party wish to accept this call?` is displayed.
  - If the subscriber answers the call and agrees to transfer the call, click on **Yes**.
  - Else, click on **No**. The call transfer is cancelled and you continue the call.

Transferring a Call to a Queue or Agent

The agent who answers the call can read and edit the information for the current caller, and can also perform the wrapup.

Picking up a Call

It is possible to pick up a call that is signaled at another agent. For example, if agents leave their desk without changing their status (Break, etc.).

Related concepts

User Interface Elements on page 12
Call Processing on page 25
Calls List on page 42

6.8.1 Initiating a Call

Step by Step

In the **Dial / Search** field of the myAgent main window do one of the following:

- Enter the phone number in dialable or canonical format; then press `Enter` or click on **Dial** in an entry of the search result list.
- Enter the first few letters of a name (at least 3 characters). All names starting with the entered letters are displayed in a search result list. Click on **Dial** on the desired entry.

  If you want to show all results press `Enter`; then select the desired entry in the hit list and do one of the following:

  - In the context menu click on the desired station number.
  - Click on **Dial**.

Related concepts

Call Number Formats on page 119

6.8.2 Making a Call from Calls List

Prerequisites

The **Calls list** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) Click on the desired call in the **Calls list**.

2) Click on **Dial** in the context menu of this call and select the desired phone number.

Related tasks

Opening or Closing the Calls List Panel on page 43

6.8.3 Making a Call from the Internal Directory

Prerequisites

The Internal Directory panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) Click on **Internal Directory** in the sidebar.

2) Select one of the following options:

- Select the relevant directory entry and click on **Dial**.
- Click in the context menu of the relevant directory entry and select the desired station number.

6.8.4 Making a Call with an Attendant Button

Prerequisites

The Attendant Buttons panel is open; see Opening or Closing the Internal Directory Panel on page 70.

Step by Step

Click on the relevant Attendant button.

Related concepts

Attendant Buttons on page 78

6.8.5 Placing a Call on Hold

Step by Step

1) Select one of the following options:

- Click on ⏸ **Hold** in the screen pop of the incoming myAgent call.
- Click on ⏸ **Hold** in the tray pop of the incoming myAgent call.

2) When you want to resume the call, you have the following options:

- Click on ▶ **Reconnect** in the screen pop of the incoming myAgent call.
- Click on ▶ **Reconnect** in the tray pop of the incoming myAgent call.

6.8.6 Transferring a Call to an Agent

Prerequisites

You have accepted a call.

Step by Step

1) Select one of the following options:

- Click on **Transfer** in the screen pop of the incoming myAgent call.
- Click on **Transfer** in the tray pop of the incoming myAgent call.

2) Select or clear the **Display available users only.** check box.

3) Select one of the following options:

- Selected the desired agent and click on **Transfer**.
- Enter the number of the desired agent in the **Destination** field and click on **Transfer**.

4) If you receive a screen pop with the prompt: `Does the other party wish to accept this call?`, click on **Yes**.

5) Click on **Close**.

The agent who answers the call can read and edit the information for the current caller, and can also perform the wrapup.

6.8.7 Forwarding a Call to a Queue

Prerequisites

You have accepted a call.

Step by Step

1) Select one of the following options:

- Click on **Forward this call to another queue** in the screen pop of the incoming myAgent call.
- Click on **Forward this call to another queue** in the tray pop of the incoming myAgent call.

2) Click on the desired queue from the list to transfer the call.

3) If you receive a screen pop with the prompt: `Does the other party wish to accept this call?`, click on **Yes**.

4) Click on **Close**.

The agent who answers the call can read and edit the information for the current caller, and can also perform the wrapup.

6.8.8 Transferring a Call with an Attendant Button

Prerequisites

You have accepted a call.

The Attendant Buttons panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) Click on the Attendant button of the desired subscriber.

2) If you receive a screen pop with the prompt: `Does the other party wish to accept this call?`, click on **Yes**.

> **INFO:**
>
> After the transfer, the call is no longer treated as a contact center call.

Related concepts

Attendant Buttons on page 78

6.8.9 Picking up a Call for an Agent

Prerequisites

The **Internal directory** panel is open; see Opening or Closing the Internal Directory Panel on page 70

Step by Step

1) On **Internal Directory** panel click on ⚙ and select the **Display only agents** check box.
2) Click on **Call Pickup** in the context menu of the agent for whom the call is signaled.

   After taking the call, you can read and edit the information for the current caller and also perform the wrap-up.

6.8.10 Picking up a Call with an Attendant Button

Prerequisites

The Attendant Buttons panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

The call is signaled at an agent for whom you have assigned an Attendant button.

Step by Step

Click on **Call Pickup** in the context menu of the Attendant button.

After taking the call, you can read and edit the information for the current caller and also perform the wrap-up.

Related concepts

Attendant Buttons on page 78

6.8.11 Recording a Call

Prerequisites

Live recording is enabled in the communication system and you have accepted a call.

During the recording, an alert tone (beep) is played and repeated at regular intervals. If the communication system is configured for France, for example, the parties receive an announcement at the start of the recording to indicate that the call is being recorded. On completion of the recording, it is added to the caller list of the recording agent.

Step by Step

1) Select one of the following options:

- Click on **Click to start recording your active call.** in the screen pop of the incoming myAgent call.
- Click on **Record** in the tray pop of the incoming myAgent call.

2) If you want to stop the recording before the call ends, select one of the following options:

- Click on **Click to start recording your active call.** in the screen pop of the incoming myAgent call.
- Click on **Stop Rec.** in the tray pop of the incoming myAgent call.

Related tasks

Listening to a Caller's Recording on page 46

6.8.12 Requesting Assistance from Supervisors or Administrators

Prerequisites

You have accepted a call.

During a call, you can request assistance from an agent with the Supervisor or Administrator authorization level. When doing so, you can specify the reason and the type of assistance you require: Instant Messaging, Call Supervision or Override. You can indicate the urgency of your request to the Supervisor or Administrator by selecting the desired response time.

Step by Step

1) Click on **Assistance** in the sidebar or in the screen pop of the incoming myAgent call.
The **Assistance** pop up window appears.

2) Click on the underlined text in the top right corner of the **Assistance** window, and select one of the available options:

a) If you want assistance through instant messaging by an agent with Supervisor or Administrator authorization level, select **Text Assistance Requested**.

b) If you want assistance through an override by an agent with Supervisor or Administrator authorization level, select **Call Intrusion Requested** (default).

c) If you want assistance through call supervision by an agent with Supervisor or Administrator authorization level, select **Call Monitoring Requested**.

3) Enter your reason for the request in the **Request Information** field and then click on **Request**.

> **NOTICE:** If you want to terminate your request for assistance prematurely, click on **Stop** and close the **Assistance** window.
>
> If your request for assistance is not accepted within the selected time period, you can initiate a new request by clicking on **Request**.

4) After you have received the message `... is assisting you with your call`, you can exchange further instant messages with the Supervisor or Administrator by entering your instant message in the bottom field of the window and pressing `Enter`.

6.9 Calls List

The calls list shows details on the previous calls, fax and email. If desired, you can filter these calls by time period, queue, agent and other criteria. it is also possible to group the entries by type, date, queue and agent, for example. You can search the calls list by first name, last name and company name.

For each call, fax and email, the calls list contains the following information:

- Type of call (symbol)

Symbol	Type of call
	Inbound call
	Callback
	Recorded call
	Fax
	Email

- **Call ID**

  Starts with 1 and is incremented by 1 for each new call, fax and email.
- **Start Date**
- **Start Time**
- **Queue**
- **Agent / State** (Call number of agent, status of call, fax or email, e.g., abandoned call. For calls that have been transferred outside the contact center, it shows transfer and destination information.)
- **Q-Time**
- **Talk**
- **Alert**

- **CLI**
- **Title** of the caller or sender
- **Last Name** of the caller or sender
- **First Name** of the caller or sender
- **Company** of the caller or sender
- **Customer ID**
- **Call Complete**
- **Scheduled**

For each call in the Calls List, there is also a Caller History with the following information on the previous calls of the same caller:

- **Type of call (symbol)**
- **Call ID**
- The **Phone Number** of the caller
- **Date / Time**
- **Queue**
- **Agent / State** (Call number of agent / status of call, fax or email, e.g., Abandoned call. In case of transferred calls, it shows information that the call has been transferred along with the transfer destination.)

For each fax and email in the calls list, there is also a call history with the following information on the previous fax and email of the same sender:

- **Type of call (symbol)**
- **Date / Time**

- **Subject**

Related concepts

Call Functions on page 36

6.9.1 Opening or Closing the Calls List Panel

Details on the answered calls, received fax and email, and abandoned calls and email are displayed in the **Calls list** panel.

Step by Step

1) To open the **Calls list** panel, click on **Calls list** in the sidebar.
The panel opens in a pop up window.

2) To close the **Calls list** panel:

a) If the panel is open in the main window of myAgent, click on **Calls list** in the sidebar.

b) If the panel is open in a separate window, click X in its top right corner.

Related tasks

Making a Call from Calls List on page 37
Pop Out a Panel on page 92
Swapping Panels on page 93

Zoom In or Zoom Out on a Panel on page 94

6.9.2 Filtering Calls List

Prerequisites

The **Calls list** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls list** panel click on ⏲ to select on of the following options: **Today**, **Yesterday**, **This week**, **This month**, **This year**.
2) Select the desired time period in the **Start Date**, **Start Time**, **End Date** and **End Time** drop-down lists.
3) Select the desired queue in the queue drop-down list.
4) Select the desired agent in the agents drop-down list.
5) Select one of the following options for inbound calls by clicking on ⚙:
   - If you want to display your inbound calls, enable the **Inbound Call** slider.
   - If you do not want to display your inbound calls, move the **Inbound Call** slider.
6) Select one of the following options for email by clicking on ⚙:
   - If you want to display email, enable the **Email Calls** slider.
   - If you do not want to display any email, disable the **Email Calls** slider.
7) Select one of the following options for callback fax by clicking on ⚙:
   - If you want to display fax, enable the **Fax Calls** slider.
   - If you do not want to display fax, disable the **Fax Calls** slider.
8) Select one of the following options for callback calls by clicking on ⚙:
   - If you want to display your callback calls, enable the **Callback Call** slider.
   - If you do not want to display your callback calls, disable the **Callback Call** slider.
9) Select one of the following options for completed calls by clicking on ⚙:
   - If you want to display your completed calls, enable the **Completed** slider.
   - If you do not want to display your completed calls, disable the **Completed** slider.

10) Select one of the following options for incomplete calls by clicking on ⚙:

- If you want to display your incomplete calls, enable the **Incomplete** slider.
- If you do not want to display your incomplete calls, disable the **Incomplete** slider.

11) Select one of the following options for scheduled calls by clicking on ⚙:

- If you want to display only scheduled calls, enable the **Scheduled Calls Only** slider.
- If you do not want to display scheduled calls, disable the **Scheduled Calls Only** slider.

12) If you want to sort the calls list in alphanumeric ascending order, click on the title of the corresponding column. Click again to sort in descending order.

13) If you want to group the calls, click on the **Group By** drop-down list and select whether the entries should be grouped, and if so, by which criterion.

If you don't select at least one of the **Inbound Call**, **Email Calls**, **Fax Calls**, **Callback Call**, **Completed**, **Incomplete** and **Scheduled Calls Only** check boxes, then no call will be displayed.

6.9.3 Displaying the History of a Caller

Prerequisites

The **Calls list** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) Double-click on the desired call in the calls list.
2) Click on **Caller History** in the screen pop.

6.9.4 Displaying the History of a Fax Sender

Prerequisites

The **Calls list** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) Double-click on the desired fax in the calls list.
2) Click on **Caller History** in the screen pop.

6.9.5 Displaying the History of an Email Sender

Prerequisites

The **Calls list** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) Double-click on the desired email in the calls list.
2) Click on **Caller History** in the screen pop.

6.9.6 Listening to a Caller's Recording

Prerequisites

The **Calls list** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) Click on the desired call in the **Calls List**. Calls with recordings have the ● **Record** symbol.
2) Click on **Play** in the context menu of this call.
   The recording is played through the default application of your system.

Related tasks

Recording a Call on page 40
Recording Calls as a Supervisor or Administrator on page 61

6.10 Caller History

In the pop up of an incoming call, the **Caller History** tab displays the history of the caller.

In caller history each entry represents a call. Each entry line displays the queue that the call first enters, the agent that answered this call and the start/end date that the call was handled by this agent from this queue.

If a call entry has multiple segments, meaning that the call was transferred between agents, it has the drop-down arrow next to it. You can click on this arrow to view all segments for this call.

In a call entry with segments, each segment displays the queue that the call enters, the agent handling this call and the start/end date that the call was handled by this agent from this queue.

In the example below, call entry with **Call ID 275** was handled by two agents, thus it has two segments.

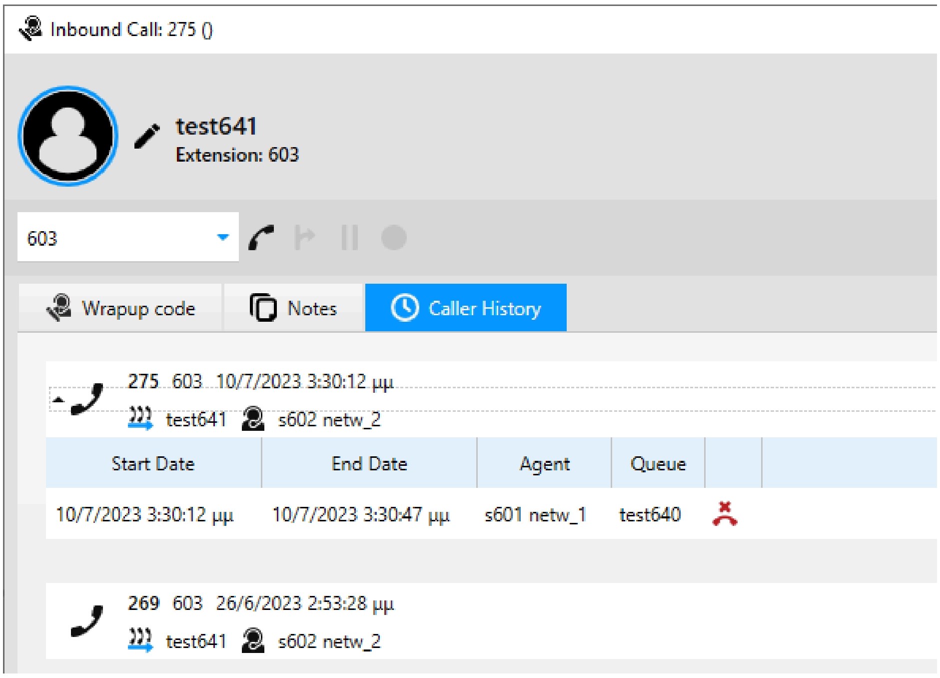
The first segment:

- Call ID 275

- Caller 603
- Start date and time 30/5/2023 at 3:30:12 a.m.
- Agent that ended the call 602
- Queue test641

The second segment:

- Start date and time 3:30:12 a.m.
- End date and time 3:30:47 a.m.
- Agent that initially answered the call s601 netw_1
- Queue test640



6.11 Wallboard (Queue Details)

Statistical information on queues are presented in the **Wallboard**.

Wallboard

The wallboard contains call, fax and email statistics for the current day in tabular form.

As an agent with the Agent authorization level, you can see every queue to which you are currently assigned. As an agent with the authorization level of a Supervisor or Administrator, you can see all queues as well as their total values. The following values are displayed:

- **Queue**
- **Calls Queuing**

  Number of calls, fax and email.
- **Agents Logged In**

  Number of logged in agents.

- **Longest Call Queuing**

  Duration of ongoing wait time in seconds for the oldest call, fax or email.
- **Longest Idle Agent**

  Duration of time passed in seconds since receiving the last call, fax or email.
- **Calls Answered Today**

  Total of answered calls and received fax and email today.
- **Calls Abandoned Today**

  Total of abandoned calls and email today.
- **Total Calls**

  Total of answered calls, received fax and email, and abandoned calls and email (not including the currently queued calls, fax and email).

6.11.1 Displaying the Wallboard Panel

Step by Step

1) Click on **Wallboard** in the sidebar if the wallboard panel is not open.

   If required, click on the ⁝⁝⁝ to show this button.
2) Open the panel's toolbar. see Opening a Panel's Options Menu on page 94.
3) Click on ⚙ **Options**.
4) Select **Wallboard** from the drop-down list.

Related tasks

Pop Out a Panel on page 92
Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94

6.12 Grade of Service

The **Grade of Service** shows a bar diagram in real time with statistical information on the quality of switching in the queues for the current 24-hour period.

As an agent with the authorization level of an agent, you can see every queue to which you are currently assigned. As an agent with the authorization level of a Supervisor or Administrator, you can see all queues.

Agents with the Supervisor or Administrator authorization level can specify target values in the WBM for quality of switching in the queue. Quality assessments can then be made by comparing these target values with the actual waiting times for callers in the queue.

6.12.1 Displaying the Grade of Service Graph

Step by Step

1) Click on **Wallboard** in the sidebar if the wallboard panel is not open.

   If required, click on the ⠿ to show this button.
2) Open the panel's toolbar. see Opening a Panel's Options Menu on page 94.
3) Click on ⚙ **Options**.
4) Select **Grade Of Service** from the drop-down list.

Related tasks

Pop Out a Panel on page 92
Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94

6.13 Average Times

The **Average Times** graph shows a bar diagram in real time with statistical information on waiting periods in queues and talk times for the current 24-hour period.

As an agent with the authorization level of an agent, you can see every queue to which you are currently assigned. As an agent with the authorization level of a Supervisor or Administrator, you can see all queues. The following values are displayed:

- **Average time in queue** (seconds)

  Updated on completion of every new inbound call and every new inbound fax and email received.
- **Average talk time** (seconds)

  Updated on completion of every new inbound call and every new inbound fax and email received.

6.13.1 Displaying the Average Times Graph

Step by Step

1) Click on **Wallboard** in the sidebar if the wallboard panel is not open.

   If required, click on the ⠿ to show this button.
2) Open the panel's toolbar. see Opening a Panel's Options Menu on page 94.
3) Click on ⚙ **Options**.
4) Select **Average Times** from the drop-down list.

Related tasks

Pop Out a Panel on page 92

Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94

7 Functions for Supervisors or Administrators

An agent with the authorization level of a Supervisor or Administrator has elevated privileges. Besides the usual functions available to the agent authorization level, supervisors and administrators can access additional functions in myAgent. For example, one or more agents can be assigned to queues, removed from queues and also moved between queues. The agent assignment (binding) can be used to define the properties of an agent within a queue.

7.1 Visual Wallboard

The Visual Wallboard is only accessible to agents with the authorization level of a Supervisor or Administrator.

It displays the following options:

For each queue:

- **Active Calls**
- **Total Calls**
- **Available Agents**
- **Total Agents**
- **Grade of Service (percentage based)**
- **Answered / Abandoned Calls (percentage based)**
- **Time / Rotation interval**

For each agent:

- **Agent State**
- **Average Talk Time**
- **Average Alert Time**
- **Total**

7.1.1 Displaying the Visual Wallboard Panel

Step by Step

1) Click on **Wallboard** in the sidebar if the Wallboard panel is not open.

If required, click on the ⠿ to show this button.

2) Open the panel's toolbar. see Opening a Panel's Options Menu on page 94.

3) Click on ⚙ **Options**.

4) Select **Visual Wallboard** from the drop-down list.

7.1.2 Configuring the Visual Wallboard

The **Visual Wallboard** can be configured to rotate at specific intervals, between available queues and in total.

Step by Step

1) Open the panel's toolbar. see Opening a Panel's Options Menu on page 94.
2) Hover over **Visual Wallboard** to display the options menu.
3) Under **Display Queues** select or unselect a queue to show or hide regarding that queue.
4) Select or unselect **Display Total** to show or hide information regarding all queues (total).
5) Set a value between 5 and 180 seconds in the input field of the **Rotate Every [ ] Seconds** option.

7.2 Agent Assignment (Binding)

The agent assignment (binding) defines the properties of an agent within a queue.

Agent Assignment (Binding)

An agent with the authorization level of a Supervisor or Administrator can assign agents to one or more queues, remove agents from queues or move agents between queues. In addition, he or she can define the following properties of agent assignments:

- **Primary Agent** or **Overflow Agent**

  Calls, fax and email are distributed uniformly to primary agents An overflow agent, by contrast, receives a call, fax or email only when a specified number or specified waiting time for them is exceeded.
- **Enable agent callback**

  Agent callback enables a caller in the queue to leave a voicemail for agents. As soon as an appropriate agent becomes free, that agent receives a call, hears the voicemail left by the caller, and can then call back that caller.
- **Skill Level**

  Skill levels control the distribution of calls, fax and email to agents. Agents with higher skill levels are given precedence in the distribution. In cases where all agents have the same skill level, the longest idle agent receives the next call, fax or email.
- **Work time**

  Duration of the default work time in seconds. The work time enables agents to finish any administrative tasks that may be required after completing a call or reading a fax or email before they receive the next call, fax or email.

- **Overflow after calls in queue**

  Calls, fax and email that exceed this maximum number are received by an overflow agent.
- **Overflow after seconds in queue**

  Calls, fax and email that exceed this waiting period are received by an overflow agent.

The **Agent Binding List** area shows which agents are assigned to which queues. You can optionally select whether these assignments should be displayed for all queues or for certain queues only.

Agent Status

In the **Agent Binding List** area, the symbol for an agent provides information on his or her status.

Symbol	Status	Available for calls, fax and email
	Logged in, primary agent The agent is logged into the queues and is a primary agent in this queue. Such agents can select and log in from any free phone to accept Contact Center calls.	X
	Logged in, overflow agent The agent is logged into the queues and is an overflow agent in this queue. Such agents can select and log in from any free phone to accept Contact Center calls.	X
	Logged out, primary agent The agent is not logged into the queues. In order to be available for calls, fax and email, he or she must first log into the queues.	–
	Logged out, overflow agent The agent is not logged into the queues. In order to be available for calls, fax and email, he or she must first log into the queues.	–
	Inbound call (before the phone rings)	–
	Phone is ringing	–
	Agent is calling	–
	Agent is on the phone	–

Symbol	Status	Available for calls, fax and email
	Post-processing after a call, fax or email After completing a call or reading a fax or email, the agent still has the associated screen pop open. In order to be available for calls, fax and email again, the agent must close the screen pop.	–
	Overdue after call, fax or email After completing a call or reading a fax or email, the agent has left the associated screen pop open for too long. In order to be available for calls, fax and email again, the agent must close the screen pop. The overdue time starts after the agent has closed the Pop Up and the screenpop time is expired.	–
	Work time, with indication or remaining time (in seconds) On ending a call (fax or email) and closing the associated screen pop, the agent is automatically in the default work time. On completion of the work time, the agent is automatically in placed the available state. The agent can optionally extend the work time, more than once if needed. In order to be available for new calls, fax and email, he or she must first terminate the ongoing work time or wait for it to expire.	–
	On a break, with indication of time of return The agent specifies the type and scheduled duration at the start of the break. In order to be available for calls fax and email again, he or she must end the current break.	–
	Overdue after break The agent has not completed his or her break although the scheduled break time has expired. In order to be available for calls fax and email again, he or she must end the current break.	–

Symbol	Status	Available for calls, fax and email
	Not for permanently available agents: Missed call, fax or email The agent has not accepted a call, fax or email. The **Missed Call** screen pop appears with the message: `You have missed a call. To continue receiving calls, click the button below`. In order to be available for calls, fax and email again, the agent must click on **Receive Calls** screen pop.	–

An agent with the Supervisor or Administrator authorization level can change the status of an agent. This requires the relevant agent to have already started myAgent.

For example, if an agent has not accepted a call, fax or email, he or she is assigned the not available status. Agents with the authorization level of a Supervisor or Administrator can change this status to make the agent available again for calls, fax and email.

In addition, an agent can be logged into a queue or logged out of it.

NOTICE: Whenever a logged in agent changes his or her presence status in myPortal for Desktop, myPortal for Outlook, and myPortal @Work, that agent is automatically logged out from the queue.

7.2.1 Assigning Agents to a Queue

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Select one of the following options for selecting the agent:

- If you want to select the agent via the internal directory, proceed as follows:

  Click on **Internal directory** in the sidebar.

  Click on in the **Internal directory** pop up window that appears.

  Select the **Display only agents** check box.

  Drag the relevant agent from the internal directory to the desired queue in the **Agent Binding List**.
- If you want to select the agent via the Attendant buttons, proceed as follows:

  Click on **Attendant Buttons** in the sidebar.

  Drag the relevant agent from the appropriate Attendant button to the desired queue in the **Agent Binding List**.

The **Agent Queue Binding** pop up window for this agent appears.

2) Select one of the following options:

- If the agent is to receive calls, fax and email without regard to the load on the queue, select **Primary Agent** in the **Type** drop-down list.
- If the agent is to receive calls, fax and email only when the queue overflows, select **Overflow Agent** in the **Type** drop-down list.

3) Select one of the following options:

- If the agent is to be allowed to receive callbacks, select the **Enable agent callback** check box.
- If the agent is to be prevented from receiving callbacks, clear the **Enable agent callback** check box.

4) Enter a percentage value for the **Skill Level** of the agent.

Skill levels enable you to control the distribution of calls, fax and email to agents in a queue. Agents with higher skill levels are given preference during the distribution. In cases where all agents have the same skill level, the longest idle agent receives the next call, fax or email.

5) Enter the automatic work time in seconds for the agent in this queue in the **Work time** field.

6) If you have selected **Overflow Agent**:

a) Enter the maximum number of calls, fax and email in the **Overflow after calls in queue** field. Calls, fax and email that exceed this maximum number are received by an overflow agent.

b) Enter the time after which an incoming call, fax or email should be forwarded to an overflow agent in the **Overflow after seconds in queue** field.

7) Click on **OK**.

Related tasks

Editing Agent Assignments on page 57
Moving Agents between Queues on page 58
Removing Agents from Queues on page 59

7.2.2 Editing Agent Assignments

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Select one of the following options:

- Click on the relevant agent or click on **Properties** on the context menu of the relevant agent of the appropriate queue in the **Agent Binding List** area.

The Agent Queue Binding window for this agent appears.

2) Select one of the following options:

- If the agent is to receive calls, fax and email without regard to the load on the queue, select **Primary Agent** in the **Type** drop-down list.
- If the agent is to receive calls, fax and email only when the queue overflows, select **Overflow Agent** in the **Type** drop-down list.

3) Select one of the following options:

- If the agent is to be allowed to make callbacks, select the **Enable agent callback** check box.
- If the agent is to be prevented from making callbacks, clear the **Enable agent callback** check box.

4) Enter a percentage value for the **Skill Level** of the agent.

Skill levels enable you to control the distribution of calls, fax and email to agents in a queue. Agents with higher skill levels are given preference during the distribution. In cases where all agents have the same skill level, the longest idle agent receives the next call, fax or email.

5) Enter the automatic work time in seconds for the agent in this queue in the **Work time** field.

6) If you have selected **Overflow Agent**:

a) Enter the maximum number of calls, fax and email in the **Overflow after calls in queue** field. Calls, fax and email that exceed this maximum number are received by an overflow agent.

b) Enter the time after which an incoming call, fax or email should be forwarded to an overflow agent in the **Overflow after seconds in queue** field.

7) Click on **OK**.

Related tasks
Assigning Agents to a Queue on page 55

7.2.3 Moving Agents between Queues

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Drag the desired agent from his/her current queue and drop him/her to an other queue in the **Agent Binding List** area. The **Agent Queue Binding** window for this agent appears.

2) Select one of the following options:

- If the agent is to receive calls, fax and email without regard to the load on the queue, select **Primary Agent** in the **Type** drop-down list.
- If the agent is to receive calls, fax and email only when the queue overflows, select **Overflow Agent** in the **Type** drop-down list.

3) Select one of the following options:

- If the agent is to be allowed to make callbacks, select the **Enable agent callback** check box.
- If the agent is to be prevented from making callbacks, clear the **Enable agent callback** check box.

4) Enter a percentage value for the **Skill Level** of the agent.

Skill levels enable you to control the distribution of calls, fax and email to agents in a queue. Agents with higher skill levels are given preference during the distribution. In cases where all agents have the same skill level, the longest idle agent receives the next call, fax or email.

5) Enter the automatic work time in seconds for the agent in this queue in the **Work time** field.

6) If you have selected **Overflow Agent**:

a) Enter the maximum number of calls, fax and email in the **Overflow after calls in queue** field. Calls, fax and email that exceed this maximum number are received by an overflow agent.

b) Enter the time after which an incoming call, fax or email should be forwarded to an overflow agent in the **Overflow after seconds in queue** field.

7) Click **OK**.

Related tasks
Assigning Agents to a Queue on page 55

7.2.4 Removing Agents from Queues

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

On the **Agent Binding List** area locate the relevant agent of the appropriate queue and click on **Remove** in its context menu.

Related tasks

Assigning Agents to a Queue on page 55

7.2.5 Changing Agent's Status

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The agent in question has started myAgent.

Step by Step

On the **Agent Binding List** area locate the relevant agent of the appropriate queue and select one of the following options in the context menu:

- If you want to log in a logged out agent into a queue, click on **Log Into Queues**.
- If you want to log out a logged in agent from a queue, click on **Log Out**.
- If you want to make an unavailable agent (for example after a missed call) available again for calls, fax and email, click on **Receive Calls**.

7.2.6 Customizing the Display of Agent Binding List

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Hover over **Agents** in the **Agents Binding List** area and click on .
2) Move the sliders for the queues that you want to be displayed in the **Agents Binding List** area to ON.
3) Move the sliders for the queues that you do not want to be displayed in the **Agents Binding List** area to OFF.

7.2.7 Displaying Agent Queue Binding Window

Step by Step

In the **Agents Binding List** hover over the agent for whom you want to see details.
The Agent Queue Binding pop window displays the following information regarding the agent:

- **Name**
- **Queue**
- **Agent Type**
- **Callback Agent**
- **Skill Level**
- **Work Time**

7.3 Monitor Calls and Request Assistance

You can record calls in order to monitor them, save them as WAV files or send them by email. To assist agents, you can exchange instant messages, monitor calls silently or even override a call.

Recording a Call

During the recording, an alert tone (beep) is played and repeated at regular intervals. If the communication system is configured for France, for example, the parties receive an announcement at the start of the recording to indicate that the call is being recorded.
On completion of the recording, it is added to the caller list of the recording agent.

Call Supervision (Country Dependent)

You can listen in on a call unnoticed (Call Supervision).

In order to silently monitor a call, you must have the Call Supervision or Silent Monitoring class of service in the communication system.

Overriding a Call

You can also override a call to provide instructions to the agent without being noticed by the caller. During an intrusion, a call may be interrupted by up to two seconds.

In order to override a call, you must have the Discreet Call class of service in the communication system.

Position of a Call in a Queue

You can move a waiting call to the first position in the queue to allow it to reach the next available agent faster.

Assistance

The **Assistance** screen pop shows you a list of all agents who are currently requesting assistance. The list includes the **Reason**, **Time Remaining** for an answer, **First Name**, **Last Name** and **Company** of the caller as well as the type of assistance desired: **Text Assistance Requested** (Instant Messaging), **Override Requested** or **Call Supervision Requested**. Instant Messaging is available for every type of assistance. You can reply to a request for assistance or reject it. If you do not process a request within the response time, it is canceled. Only *one* agent with the Supervisor or Administrator authorization level can accept a request for assistance.

Saving and Sending Fax and Email

fax can be saved in the PDF or TIFF file format and sent by email.

email can be saved in the EML file format and sent as EML files by email.

7.3.1 Recording Calls as a Supervisor or Administrator

Prerequisites

Live recording is enabled in the communication system.

You are an agent with the authorization level of a Supervisor or Administrator.

The **Live Calls** panel is open; see Opening or Closing the Live Calls Panel on page 24 .

Step by Step

1) On the **Live Calls** panel locate the relevant call and click on **Record** in the context menu of this call.
2) If you want to stop the recording before the call ends, click on **Stop Rec.** in the context menu of this call.

Related tasks

Listening to a Caller's Recording on page 46

7.3.2 Saving the Recording of a Call

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel locate the relevant call and click on **Save As** in the context menu of this call.

2) Select the directory in which the file is to be stored.

3) Enter the desired name in the **File Name** field and click on **Save**.

7.3.3 Sending the Recording of a Call by Email

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel locate the relevant recorded call and click on **Send in Email** in the context menu of this call.

The system's default email client opens. The contact name, the phone number and the agent information are provided in the body of the email.

2) Enter the email address of the desired recipient(s) in the **To** and **Cc** fields.

3) Enter the desired text in the **Subject** field.

4) Click on **Send**.

The recording of the call is sent as a WAV file in the attachment of the email.

7.3.4 Saving a Fax

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel locate the relevant fax message and click on **Save As** in the context menu of this fax message.

2) Select the directory in which the file is to be stored.

3) Enter the desired name in the **File Name** field and click on **Save**.

7.3.5 Sending a Fax by Email

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel locate the relevant fax message and click on **Send in Email** in the context menu of this fax message.
   The system's default email client opens. The contact name, the phone number and the agent information are provided in the body of the email.
2) Enter the email address of the desired recipient(s) in the **To** and **Cc** fields.
3) in the **Subject** field, change the preconfigured text if required. By default, the **Queue** and **Call ID** numbers are provided.
4) Click on **Send**.

   The fax is sent as a PDF or TIFF files in the attachment of the email.

7.3.6 Saving an Email in EML Format

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel locate the relevant email message and click on **Save As** in the context menu of this email message.
2) Select the directory in which the file is to be stored.
3) Enter the desired name in the **File Name** field and click on **Save**.

7.3.7 Sending an Email Message by Email

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List** panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel locate the relevant email message and click on **Send in Email** in the context menu of this email message.
2) Click on **Send in Email** in the context menu of this email.
3) Enter the email address of the desired recipient in the **To** field.
4) Enter the desired text for **Subject**.
5) Click on **Send**.

   The email is sent as an EML file in the attachment of the email.

7.3.8 Monitoring Calls (Country Dependent)

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Live Calls** panel is open; see Opening or Closing the Live Calls Panel on page 24.

Step by Step

On the **Live Calls** panel locate the relevant call and click on **Monitor This Call** in the context menu of this call.

7.3.9 Overriding a Call

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Live Calls** panel is open; see Opening or Closing the Live Calls Panel on page 24.

Step by Step

On the **Live Calls** panel locate the relevant call and click on **Intrude On Call** in the context menu of this call.

INFO: During an override, a call may be interrupted by up to two seconds.

7.3.10 Changing a Call's Queue Position

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Live Calls** panel is open; see Opening or Closing the Live Calls Panel on page 24.

Step by Step

On the **Live Calls** panel locate the relevant call and click on **Move to Top Position** in the context menu of this call.

7.3.11 Accepting Assistance Requests

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The is displayed on the right top corner of the myAgent main window.

Step by Step

1) Click on .

   The **Assistance** pop up window appears.

2) Hover over the entry of an agent to display the options for configuring the request. You can either assist by replying to the request or reject it.

3) If you want to reject the request, click on **Reject** and skip the remaining steps. Otherwise, skip this step and continue with step 4.

4) Based on the type of the request, a different assistance icon is displayed. To assist:

   - If call intrusion is requested, click on to override the agent's call.
   - If text assistance is requested, click on to exchange instant messages with the agent.
   - If call supervision is requested, click on to listen to the agent's call.

   Instant messages can also be exchanged with an agent after overriding the agent's call.

   Enter your instant message in the bottom field of the window and press the `Enter` key.

5) If you want to end this assistance, click on **Stop**.

7.4 Monitor Queues

The status of a queue can be monitored by the number of waiting calls and the waiting time of a call.

Monitoring the Number of Waiting Calls, Fax and Email

In the **Agent Binding List** area, the symbol for a queue provides information on its status.

Symbol	Status
	Normal
	Alarm for number of waiting calls, fax and email The number of waiting calls, fax and email in this queue has exceeded the threshold value. For each queue, an alarm threshold value for the number of waiting calls can be configured in the WBM by an agent with the authorization level of a Supervisor or Administrator.

Monitoring the Waiting Time of Calls and Email

Calls and email for which the waiting time in the queue has exceeded the alarm threshold value are displayed in the **Live Calls** in red.
For each queue, an alarm threshold time value can be configured in the WBM by an agent with the authorization level of a Supervisor or Administrator.

Alarm Message

An agent with the authorization level of a Supervisor or Administrator can activate the following features as alerts for alarms in myAgent:

- myAgent always on top for alarms
- Alarm tone

7.4.1 Enabling or Disabling the Alarm Screen Pop

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.
3) Select one of the following options if the number of waiting calls, fax and email in a queue has exceeded the alarm threshold value:
   - If you want myAgent to appear automatically in the foreground for alarm conditions, select the check box **Screenpop when calls hit alarm condition**.
   - If you do not want myAgent to appear automatically in the foreground for alarm conditions, clear the check box **Screenpop when calls hit alarm condition**.
4) Click on **Save**.

7.4.2 Activating or Deactivating the Warning Tone

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.

3) Select one of the following options if the number of waiting calls, fax and email in a queue has exceeded the alarm threshold value:

- If you want to enable the alarm tone, select the check box **Play alarm tones when calls hit alarm conditions**.
- If you want to disable the alarm tone, clear the check box **Play alarm tones when calls hit alarm conditions**.

4) Click on **Save**.

7.5 Other Features

You can delete caller notes in screen pops.

7.5.1 Deleting Caller Notes

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Calls List**panel is open; see Opening or Closing the Calls List Panel on page 43.

Step by Step

1) On the **Calls List** panel double-click on the desired call.

The **Inbound Call** pop up window appears.

2) Click on **Notes** in the screen pop.

3) Click on the desired item in the notes list and then click on 🗑.

8 Directories

Directories organize your contacts.

myAgent provides the following directories, which support the following functions:

Symbol	Directory	Make Call	Search by name	Change presence status	Send Instant Message
i	Internal Directory Contains: • **Users**, specifically internal subscribers and MULAP groups for which the display is activated in the system with their Presence status (only system telephones). When a subscriber is absent, you can see the scheduled time of return in the **Return Time** column, provided that subscriber has allowed his or her Presence status to be visible to you. Any info text that may have been entered by the subscriber are also displayed. • **Virtual Users**, marked with the icon . • **Groups**, marked with the icon . • **UCD Groups**, which mean groups of subscribers that can be reached at a single phone number. They are marked with the icon . By default, the Internal Directory shows only **Users**. You can filter the Internal Directory to show **Users**, **Virtual Users**, **Groups** or **UCD groups** by activating the corresponding checkbox. By activating the **Display only agents** check box, the Internal Directory shows only subscribers that are agents.	X	X	X	X
	External directory: Contains contacts from a corporate directory and must be configured by an agent with the Supervisor or Administrator authorization level in the WBM.	X	X	–	–

Symbol	Directory	Make Call	Search by name	Change presence status	Send Instant Message
	External Offline Directory (LDAP): Contains contacts from an offline corporate directory and must be configured by an agent with the Supervisor or Administrator authorization level in the WBM. The external offline directory is only used for the search.	X	X	–	–
–	Speed dials: Contains all system numbers, UC and non UC users. Non UC users include stations with no UC licenses and virtual stations, like Fax, AutoAttendant.	x	x	-	-

NOTICE: Phone numbers stored in user settings and directories should be entered in canonical format in order to be reachable both from UC and device. The access code should not be in the number.

Search in directories

You can choose whether to search in the internal directory and/or the external directory and/or the external offline directory (LDAP) and/or Outlook Contacts directory.

Searches in internal external directories and speed dials are faster. Hence, the search results for these directories are displayed first. The display of hits in the external off-line directory (LDAP) occurs after a short delay.

Note that the simple (quick) search dialog decides whether it should use a full word or partial word matching, based on the setting in the main search window. For both scenarios, *OR* is used as an operator for the queries; If *any* of the keywords (delimited with a space ' ') is found in a contact field, it is a match and the result is returned.

Contact Details in the Internal Directory

The List view of contacts shows the following details next to the presence status: **Extension**, **Return Time**, **Last Name**, **First Name**, **Mobile**, **Assistant**, **External 1**, **External 2**, **Home**, **Fax**, **Email Address**, **Department**, **Site**. The width of all columns is variable.

Sorting Contacts in the Internal Directory

You can sort the contacts of the internal directory by any column in ascending or descending alphanumeric order. The direction in which the triangle at a column header is pointing indicates the ascending or descending order.

Zooming in on an Entry in the Internal Directory

You can zoom in on a specific entry one character at a time in the column by which the entries are sorted. For example, you could jump to the first Last Name starting with "Sen" one letter at a time. This method can also be used in the results of a search.

Copying contacts into the external directory

An agent can save (copy), edit and delete the contact details of a call (**Title**, **First Name**, **Last Name** and **Company**) in the external directory via the screen pop. In this case, the caller's phone number is assigned and set as the **Business 1** phone.

> **NOTICE:** When the license status changes, your user configurations are kept, except from the Voicemail settings.

Related concepts

Presence Status on page 87

8.1 Opening or Closing the Internal Directory Panel

Details of the internal directory contacts are displayed in the **Internal directory** panel.

Step by Step

1) To open the **Internal directory** panel, click on **Internal directory** in the sidebar.
The panel opens in a pop up window.

2) To close the **Internal directory** panel:

a) If the panel is open in the main window of myAgent, click on **Internal directory** in the sidebar.

b) If the panel is open in a separate window, click X in its top right corner.

Related tasks

Pop In a Panel on page 92

8.2 Searching in Directories

Step by Step

1) In the **Dial / Search** field of the myAgent main window enter a search term and press the `Enter` key.

   The **Search** pop up window appears with a hit list of the search results.

   NOTICE: If the search term matches a phone number in dialable or canonical format and you press the `Enter` key, then a call will be initiated to this phone number.

2) If necessary, click on **Options** to display the search options.
3) Select one of the following Search options:
   - If you want to search for a full word, enable the **Match Full Word** check box.

     NOTICE: When **Match Full Word** is enabled, the search term must not contain any space character.
   - If you want to search for a part of a word, clear the **Match Full Word** check box.

     NOTICE: Search terms with spaces only apply to **first name** and **surname**.
4) Select which directories are to be included in the search by selecting or clearing the **Internal Directory**, **Speed Dials**, **External Directory**, **External Offline Directory** and **Outlook Contacts** check boxes as required.

   All directories options are selected by default.

   Searches in internal and external directories, speed dials are faster. Hence, the search results for these directories are displayed first. The display of hits in the external off-line directory (LDAP) occurs after a short delay.
5) If you have selected the **Internal Directory**, you can select one or more of the following filter options:
   - **Users**
   - **Virtual Users**
   - **Groups**
   - **UCD Groups**
6) If you want to perform an advanced search, click on **Advanced**, enter a search term in the appropriate fields and click **Search**.

   If your search returns a result, myAgent will display a hit list. Additionally, you can limit the length of the hit list by selecting one of the **Max Hits** radio buttons: **50**, **100**, **200**, **300** or **All**
7) To abort an ongoing search, click **Stop**.

8.3 Sorting the Internal Directory

Prerequisites

The **Internal directory** panel is open; see Opening or Closing the Internal Directory Panel on page 70

Step by Step

1) On the **Internal directory** panel click on one of the column titles of the internal directory, e.g., **Last Name**, to sort the contacts by this criterion in ascending alphanumeric order.
2) If you want to reverse the sort order, click again on the column header.
   The internal directory is sorted based on the selection. The column used for the sorting is marked with an upwards or a downwards pointing arrow, depending or the sorting order.

8.4 Filtering the Internal Directory

You can filter the Internal Directory to display any of the Users, Virtual Users, Groups or UCD Groups and also to show the agents only or all the subscribers in each of them.

Prerequisites

The **Internal directory** panel is open; see Opening or Closing the Internal Directory Panel on page 70

Step by Step

1) On the **Internal directory** panel click on ✿ to display the directory options.
2) Select one or more of the following filter options:
   - **Users**
   - **Virtual Users**
   - **Groups**
   - **UCD Groups**

   All the options are selected by default.
3) If you want to display only agents, select the **Display only agents** check box. Otherwise, clear the **Display only agents** check box.

9 Instant Messaging

Instant messaging allows the exchange of texts as instant messages with an internal subscriber.

Sent and received instant messages are displayed to you and your communication partner as a dialog in the **Instant Message** window.

The window **Instant Message** also shows the current status of the relevant internal subscriber.

For example, for the subscriber John Doe:

- **John Doe is offline**

  The subscriber John Doe is logged out (offline). In this case, the communication system saves the instant message and displays it at the subscriber's next login.
- **John Doe**

  The subscriber John Doe is logged in (online). The subscriber can receive and send instant messages.

Related tasks

Pop Out a Panel on page 92
Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94
Pop In a Panel on page 92

9.1 Opening or Closing Instant Messages

Details of the conversations with internal subscribers are displayed in the **Instant Message** window.

Step by Step

1) To open the **Instant Message** window, click on **Instant Message** in the sidebar.

   The **Instant Message** pop up window appears.
2) To close the **Instant Message** window click X in its top right corner.

9.2 Sending an Instant Message

Prerequisites

Sending instant messages is not disabled by the administrator of your communication system.

The **Instant Message** pop up window is open; see Opening or Closing Instant Messages on page 73

Step by Step

1) On the **Instant Message** pop up window click on **New Conversation** and select the user you want to chat with.

2) If you want to add further communication partners to the chat (to create a group chat), drag them from the **Internal Directory**, **Attendant Buttons** or **Search** to the **Instant Message** pop up window.

   To display **Search** pop up window see Searching in Directories on page 71.

3) Enter the text in the **Type Messages** input field.

4) Press the `Enter` key.

9.3 Send an Instant Message from Dial/Search

Prerequisites

Sending instant messages is not disabled by the administrator of your communication system.

The **Search** pop up window is open after performing a search through the **Dial/Search** field see Searching in Directories on page 71.

Step by Step

1) On the **Search** pop up window select one of the following options:

   - Select the relevant search entry and click on .
   - Click on **Send Instant Message** in the context menu of the relevant search entry.

   The **Instant Message** pop up window appears.

2) If you want to add further communication partners to the chat (to create a group chat), drag them from the **Internal Directory**, **Attendant Buttons** or **Search** to the **Instant Message** pop up window.

   To display **Search** pop up window see Searching in Directories on page 71.

3) Enter the text in the **Type Messages** input field.

4) Press the `Enter` key.

9.4 Sending an Instant Message from Internal Directory

Prerequisites

Sending instant messages is not disabled by the administrator of your communication system.

The **Internal directory** panel is open; see Opening or Closing the Internal Directory Panel on page 70

Step by Step

1) On the **Internal Directory** panel select one of the following options:

- Select the relevant directory entry and click on **Send Instant Message**.
- Click on **Send Instant Message** in the context menu of the relevant directory entry.

The **Instant Message** pop up window appears.

2) If you want to add further communication partners to the chat (to create a group chat), drag them from the **Internal Directory**, **Attendant Buttons** or **Search** to the **Instant Message** pop up window.

To display **Search** pop up window see Searching in Directories on page 71.

3) Enter the text in the **Type Messages** input field.

4) Press the `Enter` key.

9.5 Sending an Instant Message from Attendant Buttons

Prerequisites

Sending instant messages is not disabled by the administrator of your communication system.

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) On the **Attendant Buttons** panel click on **Chat** in the context menu of the relevant Attendant button.

The **Instant Message** pop up window appears.

2) Click **New Conversation** and search for contact.

3) If you want to add further communication partners to the chat (to create a group chat), drag them from the **Internal Directory**, **Attendant Buttons** or **Search** to the **Instant Message** pop up window.

To display the **Search** pop up window see Searching in Directories on page 71.

4) Enter the text in the **Type Message** input field.

5) Press the `Enter` key.

9.6 Deleting an Instant Message

You can delete a single message or all messages that you have sent in a conversation.

Prerequisites

The **Instant Message** pop up window is open; see Opening or Closing Instant Messages on page 73

Step by Step

On the **Instant Message** pop up window select a conversation and:

a) To delete a single message that you have sent, hover over the message and click on the ✕ button.
The message is deleted for all participants.

b) To delete all your messages in the conversation, click on the ⋮ button and select **Delete Messages**.

All your messages are deleted for all participants.

NOTICE: The option **Delete Messages** is also available by right clicking on the conversation in the conversation list.

9.7 Leaving an Instant Message Conversation

You can leave a conversation at any time.

Prerequisites

The **Instant Message** pop up window is open; see Opening or Closing Instant Messages on page 73

When you leave a conversation with only one person, the conversation is permanently deleted for both of you.

When you leave a conversation with multiple people, the conversation is removed from your conversation list but other participants can continue to use it.

Before leaving a conversation, you can delete all your messages in it.

Step by Step

1) On the **Instant Message** pop up window select the conversation you want to leave, click on the ⋮ button and select **Leave**.
A pop-up window appears.

2) If the conversation is with only one person, click on **Yes**.

3) If the conversation is with multiple people, do one of the following:

a) Click on **Yes**, if you want to delete all your messages in the conversation before you leave.

b) Click on **No**, if you want your messages to remain in the conversation.

NOTICE: The option **Leave** is also available in the context menu of the conversation in the conversation list.

10 Attendant Buttons

Attendant buttons show the name and presence status of internal subscribers. They offer a quick way to call these subscribers or transfer calls to them.

You can set up multiple tabs for Attendant buttons, e.g., for different departments.

Attendant Buttons can be configured to show the picture of a user, if one is available. If the user has no picture, a non-configurable color is shown, generated based on the user's name.

They also show the status of internal subscribers (circle border color):

- Blue: Available or Idle
- Yellow: Ringing
- Red: Busy

Additionally, they can show the presence status of users if status is Busy (Red); see Presence Status on page 87.

Up to 300 Attendant buttons are available on a tab (100 by default). If no name exists, the phone number is displayed.

The Attendant buttons on a tab are sorted by Last Name in alphanumeric ascending order by default. Stations without names are sorted after the stations for which a name can be displayed. External contacts are always sorted to the end of the list.

Most of the configurations for Attendant Buttons are also available in the panel functions toolbar; see Opening a Panel's Options Menu on page 94.

Related concepts

User Interface Elements on page 12

Presence Status on page 87

Related tasks

Making a Call with an Attendant Button on page 38

Transferring a Call with an Attendant Button on page 39

Picking up a Call with an Attendant Button on page 40

10.1 Opening or Closing the Attendant Buttons Panel

The configured Attendant buttons are displayed in the **Attendant Buttons** panel.

Step by Step

1) To open the **Attendant Buttons** panel, click on **Attendant Buttons** in the sidebar.
The panel opens in the main window of myAgent.

2) To close the **Attendant Buttons** panel:

a) If the panel is open in the main window of myAgent, click on **Attendant Buttons** in the sidebar.

b) If the panel is open in a separate window, click `x` in its top right corner.

Related tasks

Pop Out a Panel on page 92
Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94

10.2 Sorting Attendant Buttons

Prerequisites

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) On the **Attendant Buttons** panel click on the desired tab.

2) Select one of the following options in the context menu of any Attendant button:

- **Sort** > **Sort By First Name**
- **Sort** > **Sort By Last Name**

NOTICE: External contacts are populated at the end.

---

3) You can also sort Attendant Buttons by selecting **Options** > **Sort** in the panel's toolbar. see Opening a Panel's Options Menu on page 94.

10.3 Assigning a Subscriber to an Attendant Button

Prerequisites

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) On the **Attendant Buttons** panel click on the desired tab.

2) Click on **Internal Directory** in the sidebar.

The **Internal Directory** pop up window appears.

3) Drag the desired subscriber from the internal directory to an Attendant button.

4) If you want to assign further subscribers to a button, repeat step 3.

5) You can also search for a contact to add, by right-clicking inside an Attendant button and clicking **Add Contact**.

6) Alternatively, you can drag a subscriber to an Attendant button from **Agents Binding List**.

10.4 Removing a Subscriber from an Attendant Button

Prerequisites

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) On the **Attendant Buttons** panel click on the desired tab.
2) Click on **Remove** in the context menu of the appropriate Attendant button.

10.5 Displaying User Pictures on Attendant Buttons

Prerequisites

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) In the panel's toolbar click on ⚙ **Options**. see Opening a Panel's Options Menu on page 94
2) Click on **Show user pictures on attendant buttons**.
The user of the picture (if available) is displayed on its corressponding icon across all tabs in the Attendant Buttons panel.

11 Reports

As an agent with the Supervisor or Administrator authorization level, you can use predefined report templates to create reports for calls, queues, agents, grades of service (GOS) and wrapup reasons in myAgent.

Before creating a report, report parameters must be set to determine the period (date, time) and entities (agents, queues, etc.) should be measured. The reports are displayed in the web browser as PDF files and can then be saved or printed.

Executing the following features from an agent telephone can lead to a distortion of the information in reports:

- Call pickup of Contact Center calls by non-agents
- Call transfers (e.g., via the Direct Station Select (DSS) key) of Contact Center calls to non-agents
- Conferencing
- Alternate (Toggle/Connect)
- Parking

INFO: The "Consultation Hold" feature is transparent for the presentation of Contact Center calls in reports and can be used by agents, regardless of the consultation destination.

Data Protection

If the myReports administrator enabled data protection when configuring myReports, the last four digits of the phone numbers (CLI column) will be replaced by **** in all relevant reports.

If the subscriber has flagged his or her private number, mobile number, external number 1 and/or external number 2 as invisible, these phone numbers will not be displayed in all relevant reports.

Report Templates

The following report templates are available:

Report template	Description
Abandoned calls statistics	Table with number and percentage of calls abandoned by callers before reaching an agent, per queue. It is filtering the abandoned calls where the queue time plus the pickup time is equal or greater than the configured queue abandoned calls threshold value. Q- times for callers at 30-second intervals per queue Total values for all calls, fax and email

Report template	Description
Abandoned Calls Per Hour	Bar chart and table with number and percentage of calls abandoned by callers before reaching an agent, per hour Optionally only during configured business hours
Percentage of calls received by agents (All Queues)	Bar chart and table with number and percentage of answered calls, fax and email and percentage of talk/reading time per agent Total values for all agents
Percentage of calls received by agents	Bar chart and table with number and percentage of answered calls, fax and email and percentage of talk/reading time per agent for the selected queue Total values for all the agents for the selected queue
Agent Performance Details	Table with start time, pickup time, talk/reading time and GOS (Grade of Service) for every call, fax and email for the selected agent Total values per queue and total values of all queues
Queue Load Per Agent	Bar chart and table with number and percentage of calls, fax and email per queue for the selected agent Total values for all queues
Average Grade of Service by Agent	Line chart with average Grade of Service for the selected agent at hourly intervals.
Average Grade Of Service by Agent - Daily	Line chart with average Grade of Service for the selected agent at hourly intervals on a daily basis.
Average Grade Of Service by Queue	Line chart with average Grade of Service for the selected queue at hourly intervals.
Average Grade Of Service by Queue - Daily	Line chart with average Grade of Service for the selected queue at hourly intervals on a daily basis.
Missed Calls Report	Table with Time Of Call, Call ID, Phone Number, Customer Name and Company Name of missed calls, fax and email for selected queues on a daily basis Optionally only during configured business hours

Report template	Description
Missed Calls Per Queue	Pie chart and table with number and percentage of missed calls, fax and email per queue Total values for all queues Optionally only during configured business hours
Contact Center Calls	Table with call ID, time of call, agent, queue, Q-time, CLI (phone number/fax number/email address) and customer name/company name for all calls, fax and email classified as missed, abandoned and answered calls, fax and email on a daily basis Optionally only during configured business hours ***INFO:*** A missed call, a missed fax or a missed email to an agent may also appear as a received call, received fax or received email at another agent or as an abandoned call, fax or email.
Calls List By Agent	Table with start time, end time, queue, Q-time, talk/reading time, CLI (phone number/fax number/email address) and GOS (Grade of Service) for every call, fax and email for the selected agent Optionally only during configured business hours
Answered calls statistics	Table with number of calls, fax and email, percentage of answered calls, fax and email, maximum Q-time and number and percentage of answered calls, fax and email depending on the Q-time per queue Total values for all calls, fax and email
Contact Center - Hourly Traffic	Line chart and table with number and percentage of all calls, fax and email at hourly intervals ***INFO***: This is a useful aid in provisioning a sufficient number of agents during peak hours to maintain a specific Grade of Service.
Contact Center - Hourly Traffic (Daily)	Line chart and table with number and percentage of all calls, fax and email at hourly intervals on a daily basis ***INFO***: This is a useful aid in provisioning a sufficient number of agents during peak hours to maintain a specific Grade of Service.

Report template	Description
Contact Center - Hourly Traffic by Queue - Daily	Line chart and table with number and percentage of all calls, fax and email at hourly intervals on a daily basis for the selected queue ***INFO***: This is a useful aid in provisioning a sufficient number of agents during peak hours to maintain a specific Grade of Service.
Queue Traffic Comparison	Pie chart and table with the number and percentage of calls, fax and email handled per queue Total values for all queues Optionally only during configured business hours
Queue Summary Details	Bar chart and table with number of answered and aborted calls, fax and email, number of remaining calls, maximum, minimum and average Q-time for answered and abandoned calls, fax and email and maximum, minimum and average talk/reading time for answered calls, fax and email for the selected queue Average Grade of Service for the selected queue ***INFO***: Remaining calls are calls that were, e.g., handled by a non-agent.
Contact Center Summary (All Call Types)	Table with number of calls, fax and email, average pickup time, average talk/reading time and average Q-time, number of callbacks and total Q-time, per queue Total values for all queues Optionally only during configured business hours
Contact Center Summary (Answered Calls)	Table with number of answered calls, fax and email, average pickup time, average talk/reading time and average Q-time per queue Total values for all queues Optionally only during configured business hours
Call List Open	Table with number of open calls, fax and email per queue Total values for all queues

Report template	Description
Wrap up Code Usage (All Queues)	Pie chart and table with number and percentage usage, average talk/reading time, total talk/reading time and average Q-time per wrapup reason Optionally only for the configured business hours
Wrap up Code Usage	Bar chart and table with number and percentage usage, average talk/reading time, total talk/reading time and average Q-time per wrapup reason for the selected queue. Optionally only for the configured business hours
Answered Calls (Wrap up)	Table with call ID, time of call, agent, wrapup reason, phone number/fax number/email address and customer name/company name for each answered call, fax and email for the selected queues on a daily basis Optionally only for the configured business hours

11.1 Creating Reports

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Click on **Reports** in the sidebar.

If required, click on the ⁝⁝⁝ to show this button.

2) Locate the desired report template and click on it.

3) Use the report parameters to define the time period and, if necessary, entities to be measured (queues, agents).

> **INFO:** The report parameters depend on the selected report template.

4) If the **Business Hours Only** check box appears, select one of the following options:

- If you want to restrict the reporting period to business hours, select the **Business Hours Only** check box.
- If you do not want to restrict the reporting period to business hours, clear the **Business Hours Only** check box.

5) Click on **Display**.

6) Click on **Close**.

Next steps

Save or print the PDF file if required.

12 Presence Status

The presence status provides information on the availability of internal subscribers (including Mobility Entry stations). It is shown in the internal directory and on the attendant buttons.

As an agent (Agent, Supervisor or Administrator) with an active myAttendant license, you can change the presence status of other subscribers via the internal directory or the attendant buttons.

For every change in the presence status (except for **Office**), you also define the scheduled time of your return to the **Office** status. When the presence status of an agent is changed, the agent will be logged out from all queues automatically. To resume receiving calls, the agent must manually log back into the queue since there is no automatic login functionality available, unless the agent logs into the queue via his/her phone.

You can assign the following presence statuses to a subscriber:

Symbol	Presence status	Availability
	Office	Available at the normal workplace
	CallMe	Available at an alternative workplace
	Meeting	Busy, may not be able to respond
	Sick	Absent
	Break	Absent
	Out of Office	Absent
	Holiday	Absent
	Lunch	Absent
	Home	Absent
	Do not Disturb	Do not disturb

NOTICE: The 'sick' presence status may not be available, depending on system settings by the administrator.

The following additional symbols are available in the internal directory and on the attendant buttons:

Symbol	Presence or connection status
	Subscriber receives a call

Symbol	Presence or connection status
	Subscriber is on the phone
	Mobility Entry station receives a call or is calling
	Mobility Entry station is on the phone
	Presence status is not visible
	Phone is not connected

NOTICE: For subscribers without system telephones (e.g., those with ISDN phones or analog phones), the internal directory and attendant buttons only show the connection status.

Related concepts

Directories on page 68
Attendant Buttons on page 78

12.1 Changing a Subscriber's Presence Status

Prerequisites

You are an agent (Agent, Supervisor or Administrator) with an active myAttendant license.

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) On the **Attendant Buttons** panel select the relevant presence status under **Change Status** in the context menu of the attendant button for the desired subscriber.

   The **Change Status** pop up window appears.

   - **NOTICE:** If a myAttendant license is not active, when right clicking a user's attendant button the **Change Status** option is greyed out.

2) If desired, enter an info text for the presence status of the subscriber in the **Share something with your colleagues.** field.
3) Select one of the following options to specify the date and time of return:
   - Click on one the four buttons with the desired duration of the absence period.
   - Select the date and time of return for the subscriber via the choice lists.

4) Click on **OK**.

12.2 Changing a Subscriber's Presence Status to Office

Prerequisites

You are an agent (Agent, Supervisor or Administrator) with an active myAttendant license.

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) On the **Attendant Buttons** panel select **Office** under **Change Status** in the context menu of the attendant button for the desired subscriber.

   The **Change Status** pop up window appears.

2) Select the **Return to the office** radio button.
3) If desired, enter an info text in the **Share something with your colleagues.** field.
4) Click on **OK**.

12.3 Changing a Subscriber's Queue Status

Queue status (or agent status) describes the state of an agent in the queue and the availability to receive calls.

Prerequisites

Administrators or Supervisors without an active myAttendant license can only change the queue status of another agent from the **Agents Binding List**.

Step by Step

1) On the **Agents Binding List** select the relevant queue status in the context menu for the desired agent.
2) Select one of the following options to specify the queue status of the agent:

   - From **Logged out** to **Logged into queues**
   - From **Work Time**, **Break**, **Missed Call** to **Receive calls**
   - From every queue status to **Logged out**

12.4 CallMe Service

The CallMe service can be used to define any phone at an alternative workplace as the CallMe destination at which an agent can be reached through his/her extension phone number. The agent can use the UC client at an alternative workplace exactly as in the office and thus also make outgoing calls from the CallMe destination.

Inbound Calls

Calls to the agent's extension phone number are redirected to the CallMe destination. The agent's extension phone number is displayed to the caller. Unanswered calls are forwarded to the voicemail box after 60 seconds.

Outbound Calls

When the agent dials a number in the UC client, the communication system first calls the agent at the CallMe destination. If the agent answers the call, the communication system then calls the desired destination and connects agent with it. Agent's extension phone number is displayed at the destination (One Number Service).

Presence Status

When the CallMe service is enabled, the message "`CallMe active`" appears in the display of the agents phone (not for analog and DECT phones). Other subscribers will see the agent's presence status as **Office**, while the agent is automatically logged out from any queues.

Activation

Agents with the authorization level of a Supervisor or Administrator can activate the CallMe service for an agent manually. In addition, the CallMe service is also reactivated by an automatic reset of the agent's Presence status following an absence, provided it was active earlier. Then following types of CallMe destinations are not supported:

- Group
- Redirected telephone

Deactivation

The CallMe service remains active until the agent's presence status is changed manually to **Office**.

12.4.1 Enabling CallMe Service

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

The **Attendant Buttons** panel is open; see Opening or Closing the Attendant Buttons Panel on page 78.

Step by Step

1) Click on **Change Status** > **Office**, in the context menu of the attendant button for the desired agent.

   The **Change Status** pop up window appears.

2) Select the **Enable CallMe service** radio button.

3) Set the call number of the CallMe destination by one of the following options:

- Click on the down arrow and select one of the phone numbers from the list.
- Enter a phone number in dialable format or in canonical format.

> **NOTICE:** Do not enter a group or a redirected phone as the CallMe destination.

4) If desired, enter an info text in the **Share something with your colleagues** field.

5) Click on **OK**.

The agent's status is automatically changed to **Logged Out**.

13 Panel Functions

You can pop out, pop in and swap the panels in the panels area of myAgent. Additionally, you can zoom in and out on a panel. To display panel functions, hover over the top of the panel.

13.1 Pop Out a Panel

You can move a panel out of myAgent's main window and have it open in a separate window.

Prerequisites

At least one of the following panels is open in the main window of myAgent.:

- **Live Calls**
- **Instant Message**
- **Internal Directory**
- **Attendant Buttons**
- **Wallboard**
- **Calls List**

Step by Step

1) Hover over the top of the panel.
A toolbar appears.

2) In the panel's toolbar click on **Pop Out**.
The panel’s pop up window appears.

Related concepts

Instant Messaging on page 73

Related tasks

Opening or Closing the Live Calls Panel on page 24
Opening or Closing the Attendant Buttons Panel on page 78
Opening or Closing the Calls List Panel on page 43
Displaying the Wallboard Panel on page 48
Displaying the Grade of Service Graph on page 49
Displaying the Average Times Graph on page 49
Pop In a Panel on page 92

13.2 Pop In a Panel

You can move a separate window inside the myAgent's main window and have it displayed in one of the two fixed panels area.

Prerequisites

At least one of the following panels is open on a separate window:

- **Live Calls**

- **Instant Message**
- **Internal Directory**
- **Attendant Buttons**
- **Wallboard**
- **Calls List**

Step by Step

1) Hover over the top of the panel's pop up window.
A toolbar appears.

2) In the panel's toolbar click on **Pop In**.
The panel pops in the panels area of myAgent's main window.

Related concepts
Instant Messaging on page 73
Related tasks
Pop Out a Panel on page 92
Swapping Panels on page 93
Zoom In or Zoom Out on a Panel on page 94
Opening or Closing the Internal Directory Panel on page 70

13.3 Swapping Panels

You can swap the top and bottom panels of the myAgent's panel area.

Prerequisites

myAgent's panel area displays two of the following panels:

- **Live Calls**
- **Instant Message**
- **Internal Directory**
- **Attendant Buttons**
- **Wallboard**
- **Calls List**

Step by Step

1) Hover over the top of the panel.
A toolbar appears.

2) In the panel's toolbar click on **Swap Panels**.
The panels of myAgent's main window are swapped.

Related concepts
Instant Messaging on page 73
Related tasks
Opening or Closing the Live Calls Panel on page 24
Opening or Closing the Attendant Buttons Panel on page 78
Opening or Closing the Calls List Panel on page 43
Displaying the Wallboard Panel on page 48
Displaying the Grade of Service Graph on page 49

Displaying the Average Times Graph on page 49
Pop In a Panel on page 92

13.4 Zoom In or Zoom Out on a Panel

You can zoom in or zoom out on a panel in myAgent's panel area.

Prerequisites

At least one of the following panels is open:

- **Live Calls**
- **Instant Message**
- **Internal Directory**
- **Attendant Buttons**
- **Wallboard**
- **Calls List**

Step by Step

1) Hover over the top of the panel.
A toolbar appears.

2) Select one of the following toolbar options:

- To zoom in, move the slider to the right.
- To zoom out, move the slider to the left.

3) Alternatively, click on the current zoom level and select a predefined value from the list.

Related concepts

Instant Messaging on page 73

Related tasks

Opening or Closing the Live Calls Panel on page 24
Opening or Closing the Attendant Buttons Panel on page 78
Opening or Closing the Calls List Panel on page 43
Displaying the Wallboard Panel on page 48
Displaying the Grade of Service Graph on page 49
Displaying the Average Times Graph on page 49
Pop In a Panel on page 92

13.5 Opening a Panel's Options Menu

You can configure various options for a panel in myAgent's panel area.

Prerequisites

At least one of the following panels is open:

- **Live Calls**
- **Attendant Buttons**
- **Wallboard**

Step by Step

1) Hover over the top of the panel.

A toolbar appears.

2) In the panel's toolbar click on ⚙ **Options**.
The options for the specific panel are displayed.

14 Configuration

You can configure myAgent to suit your requirements, e.g., to customize its behavior for calls.

My Personal Details

In addition to your office phone number (extension), you can specify your mobile phone number, two different external numbers and your home phone number. For each of these numbers, you can configure whether or not they are to be displayed in the internal directory. You can enter your email address in order to be reachable by email.

In order to use email, the administrator of your communication system will need to have configured the sending of email.

My Picture

You can provide an image of any file size. The communication system saves a copy with a width and height restricted to 200 pixels.

This picture will be shown to other subscribers when they position their mouse pointers over your entry in the internal directory (Extension column).

Appearance

You can customize the appearance of myAgent choosing between two different interface colors, showing user pictures in attendant buttons and showing statistics in agent binding tooltips.

Notifications

You can customize the screen pops to only show the areas you really want to display.

Attendant Buttons

Customize the attendant buttons by adding, renaming, auto-populating attendant groups, copying from another user or setting a number of attendant buttons.

Queue Visibility

As an agent you can select which queues should be displayed in the agent binding list.

Hot Keys

Through the use of hotkeys, you can speed up your work with myAgent.

- **Global Hot Keys**

  You can use the function keys `F1`-`F12` on the keyboard of your client PC together with the `Ctrl+Shift`, `Ctrl+Alt` or `Shift+Alt` key combinations as hotkeys for the following functions:

  - **Answer/Release call**
  - **Transfer**
  - **Display ScreenPop**

  The only precondition for this is that the desired function key or key combination is not already being used by another application.

- **Hotkeys for Applications**

  You can assign the following functions to the `F1` through `F12` function keys and/or the numeric keypad keys on the keyboard of your client PC:

  - **Help** (bring up the online help)
  - **Setup**
  - **Internal directory**
  - **Calls List**
  - **Search**
  - **Answer / Release call**
  - **Hold / Unhold**
  - **Call Transfer**
  - **Reschedule**
  - **Dial**
  - **Record**

Sensitivity

Allows you to configure whether other users will be able to see the caller you are talking to and if they can copy your BLF layout.

Miscellaneous

Configure the transfer method by choosing one of the two options: Blind Transfer, Supervised Transfer. Also enable or disable live search and export configuration.

14.1 MyPersonal Details

In addition to your office phone number (extension), you can specify your mobile phone number, two different external numbers and your home phone number.

14.1.1 Defining an Additional Phone Number

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.

2) Click on **My Personal Details**.

3) Enter an additional phone number in dialable format or in canonical format in one of the following fields: **Mobile Number**, **External Number 1**, **External Number 2**, **Home Number** or **Assistant Number**.

4) Select one of the following options:

- If you do not want to see the **Mobile Number**, **External Number 1**, **External Number 2** or **Home Number** displayed in the internal directory, clear the **Visibility** check box next to the phone number.
- If you want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Home Number** displayed in the internal directory, select the **Visibility** check box next to the phone number.

5) Click on **Save**.

14.1.2 Specifying Email Address

Prerequisites

The administrator of your communication system has configured the sending of email.

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.

2) Click on **My Personal Details**.

3) Enter your email address in the **Email Address** field.

4) Click on **Save**.

14.1.3 Changing Password

NOTICE: You can also change password via the Phone menu of the voicemail box.

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.

2) Click on **My Personal Details**.

3) Click on the **Change** button, in the **Password** field.

4) Enter your current password in the **Old password** field.

NOTICE:

If the wrong password is entered five times, access to all Contact Center and UC Suite clients will be locked. Unlocking is only possible by the administrator of your communication system.

5) Enter your new password in the **New password** and **Confirm password** fields.
   a) The password must consist of only digits and include at least six digits.
   b) The maximum number of repeated characters is two and the maximum number of sequential characters is three.
   c) The account name (reversed or not) cannot be part of the password.
   d) The user is forced to change the default password after the first use.
   e) The maximum number of erroneous login attempts is five.

NOTICE: The password is valid for all UC Suite clients and for accessing the voicemail box via the telephone.

6) Click on **OK** followed by **Save**.

14.2 My Picture

You can provide an image of any file size. The communication system saves a copy with a width and height restricted to 200 pixels.

14.2.1 Uploading a Picture

Prerequisites

You have an image file with your picture in one of the following file formats: BMP, JPG/JPEG/JFIFI, PNG.

The size of the image file does not exceed 10MB.

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⁝⁝⁝ to show this button.
2) Click on **My Picture**.
3) Click on **Select**.
4) Select the desired file and click on **Open**.
5) Click on **Save**.

14.2.2 Deleting a Picture

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⁝⁝⁝ to show this button.

2) Click on **My Picture**.
3) Click on **Clear**.
4) Click on **Save**.

14.3 Appearance

You can customize the appearance of myAgent choosing between two different interface colors.

14.3.1 Changing User Interface Language

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Appearance**.
3) Select the desired language by clicking on the current preferred language at the top of the window.
4) Click on **Save**.

14.3.2 Changing User Interface Color

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Appearance**.
3) Select one of the two options for the color of the user interface.
4) Click on **Save**.

14.3.3 Displaying User Pictures on Attendant Buttons

To show user pictures on Attendant Buttons:

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Appearance**.
3) Click on **Show user pictures on attendant buttons**.
4) Click on **Save**.

You can also show user pictures on attendant buttons by opening the panel's **Options** and selecting **Show user pictures on attendant buttons**. see Opening a Panel's Options Menu on page 94.

14.4 Notifications

You can customize the notification settings to efficiently control the main window, the available tray pops, screen pops and alarms when using myAgent.

You can customize the following notifications settings:

- **Pop up application on inbound calls**:

  When a call is ringing on the user's extension, myAgent will search for a screen pop that is associated with this call. If the screen pop is found, then it will be brought to the front. If no screen pop is found, then the main window will be displayed instead.
- **Pop up application on call termination**:

  In the same way as **Pop up application on inbound calls** and **Screen pop on answer**, the resolved window will be displayed when the user terminates a call.
- **Minimize on hangup**:

  This will minimize the main window of myAgent when call handling is complete. Importantly, this will only be triggered when the agent has no calls associated with them. For example, if the agent is working on an email call and they start a voice call, terminating this call will not minimize the application because they are still working on the email.
- **Display tray pop on inbound and outbound calls**:

  This setting allows the user to activate or deactivate tray pops for call handling.
- **Display missed call notification via tray pop**:

  If activated, and the agent misses a call, a tray pop notification will be displayed. If deactivated, then a message box in the main myAgent application window will be displayed instead.
- **Screen pop takes focus when displayed**:

  Used for the pop up application on inbound calls, screen pop on answer and pop up application on call termination. If this is checked, then the focus of the windows will be shifted to the displayed pop up.
- **Screen pop on answer**:

  Similarly, the screen pop on answer will detect which window should be brought to the front but will instead be triggered when the agent answers a call.
- **Screen pop when calls hit alarm condition**:

  When alarms are triggered, the main window of myAgent will come to the foreground.
- **Play alarm tones when calls hit alarm conditions**:

  When alarms are triggered, an alarm tone will continue to be played to the user until all alarms are cleared.
- **Show toast notifications for assistant requests**:

  If checked, a toast notification will be displayed to a supervisor whenever assistance requests are active.

14.4.1 Main Window

14.4.1.1 Activating or Deactivating Main Window Pop Up on Inbound Calls

Step by Step

1) Click **Setup**.

If required, click on the ⠿ to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want the myAgent main window to appear automatically in the foreground on inbound calls, select the check box **Pop up application on inbound calls**.
- If you do not want the myAgent main window to appear automatically in the foreground on inbound calls, clear the check box **Pop up application on inbound calls**.

4) Click on **Save**.

14.4.1.2 Activating or Deactivating Main Window Pop Up on Call Termination

Step by Step

1) Click **Setup**.

If required, click on the ⠿ to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want the myAgent main window to appear automatically in the foreground on completing a call, select the check box **Pop up application on call termination**.
- If you do not want the myAgent main window to appear automatically in the foreground on completing a call, clear the check box **Pop up application on call termination**.

4) Click on **Save**.

14.4.1.3 Minimizing Main Window on Ending a Call

Step by Step

1) Click **Setup**.

If required, click on the ⠿ to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want the myAgent main window to be minimized on completing a call, select the check box **Minimize on hangup**.
- If you do not want the myAgent main window to be minimized on completing a call, clear the check box **Minimize on hangup**.

4) Click on **Save**.

14.4.2 Tray Pops

14.4.2.1 Displaying Tray Pop on Inbound Calls

Step by Step

1) Click **Setup**.

If required, click on the to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want to display tray pops for inbound calls, fax or email, select the check box **Display tray pop on inbound calls**.
- If you do not want to display tray pops for inbound calls, fax or email, clear the check box **Display tray pop on inbound calls**.

4) Click on **Save**.

14.4.2.2 Displaying Tray Pop on Outbound Calls

Step by Step

1) Click **Setup**.

If required, click on the to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want to display tray pops on outbound calls, select the check box **Display tray pop on outbound calls**.
- If you do not want to display tray pops on outbound calls, clear the check box **Display tray pop on outbound calls**.

4) Click on **Save**.

14.4.2.3 Displaying Tray Pop on Missed Call

INFO: The screen pop for missed calls, fax or email is not displayed for permanently available agents.

Step by Step

1) Click **Setup**.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.
3) Select one of the following options:
   - If you want to display tray pops for missed calls, fax or email, select the check box **Display missed call notification via tray pop**.
   - If you do not want to display tray pops for missed calls, fax or email, clear the check box **Display missed call notification via tray pop**.
4) Click on **Save**.

14.4.2.4 Displaying Tray Pop on Assistance Requests

Step by Step

1) Click **Setup**.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.
3) Select one of the following options:
   - If you want notifications to be shown for assistance requests, select the **Show toast notifications for assistance requests** check box.
   - If you do not want notifications to be shown for assistance requests, clear the **Show toast notifications for assistance requests** check box.
4) Click on **Save**.

14.4.2.5 Displaying Tray Pop on Received Chat Messages

Step by Step

1) Click **Setup**.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.

3) Select one of the following options:

- If you want to display tray pops when receiving chat messages, select the check box **Display tray pop when I receive a chat message**.

  The tray pop will be only shown when the keyboard focus is on another application and thus the Instant Message window cannot pop-up.
- If you do not want to display tray pops when receiving chat messages, clear the check box **Display tray pop when I receive a chat message**.

4) Click on **Save**.

14.4.3 Screen Pops and Alarms

14.4.3.1 Activating or Deactivating Screen Pop Taking Focus

Step by Step

1) Click **Setup**.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.
3) Select one of the following options:

- If you want a screen pops to take focus when they are displayed, select the **Screen pop takes focus when displayed** check box.
- If you do not want the screen pops to take focus when they are displayed, clear the **Screen pop takes focus when displayed** check box.

4) Click on **Save**.

14.4.3.2 Activating or Deactivating Screen Pop on Accepting a Call

NOTICE: This functionality is overridden by the activation of the screen pop via **VSAdmin** > **Contact Center** > **Queue**.

Step by Step

1) Click **Setup**.

   If required, click on the ⠿ to show this button.
2) Click on **Notifications**.

3) Select one of the following options:

- If you want screen pops to open when accepting incoming calls, select the **Screen pop on answer** check box.
- If you do not want screen pops to open when accepting incoming calls, clear the **Screen pop on answer** check box.

4) Click on **Save**.

14.4.3.3 Activating or Deactivating Screen Pop for Alarm Condition

Step by Step

1) Click **Setup**.

If required, click on the ⠿ to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want screen pops to open when calls hit an alarm condition, select the **Screen pop when calls hit alarm condition** check box.
- If you do not want screen pops to open when calls hit an alarm condition, clear the **Screen pop when calls hit alarm condition** check box.

4) Click on **Save**.

14.4.3.4 Playing Alarm Tones for Alarm Condition

Step by Step

1) Click **Setup**.

If required, click on the ⠿ to show this button.

2) Click on **Notifications**.

3) Select one of the following options:

- If you want alarm tones to be played when calls hit an alarm condition, select the **Play alarm tones when calls hit alarm conditions** check box.
- If you do not want alarm tones to be played when calls hit an alarm condition, clear the **Play alarm tones when calls hit alarm conditions** check box.

4) Click on **Save**.

14.5 Attendant Buttons

Provides buttons for fast access to internal subscribers.

From the Attendant Buttons you can perform many actions, including the following:

- Add or remove contacts

- Create new groups and auto-populate them
- Make calls
- Chat
- Sort buttons by first or last name
- Change user status
- Change number of buttons
- Show user pictures

14.5.1 Reordering Attendant Buttons Tabs

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⁝⁝⁝ to show this button.

2) Click on **Attendant Buttons**.

3) In the **Group Name** field, click on the tab that you want to move.

4) Select one of the following options:

- Click **Move Up**.
- Click **Move Down**.

5) Repeat steps 3 through 4 as required.

6) Click on **Save**.

14.5.2 Adding Attendant Buttons Tabs

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⁝⁝⁝ to show this button.

2) Click on **Attendant Buttons**.

3) Click on **Add**.

4) Enter a name for the new tab and then click on **OK**.

5) Click on **Save**.

You can also add a new tab by opening the panel's **Options** and selecting **New Group**. see Opening a Panel's Options Menu on page 94.

14.5.3 Deleting Attendant Buttons Tabs

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⁝⁝⁝ to show this button.

2) Click on **Attendant Buttons**.

3) In the **Group Name** field, click on the tab that you want to delete.

4) Click on **Remove**.

   The **Delete** confirmation window appears

5) Click on **Yes**.
6) Click on **Save**.

You can also delete a tab by opening the panel's **Options** and selecting one of the available tabs under **Remove**. see Opening a Panel's Options Menu on page 94.

14.5.4 Assigning Attendant Buttons

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.

2) Click on **Attendant Buttons**.
3) Click on the desired group under **Group Name**.
4) Click on **Auto-Populate Attendant Groups**

   The **Auto-Populate Attendant Groups** pop up window appears

5) Select one of the following options in the **Create groups based on** drop-down list.
   - If you want a tab to be created for every Department, click on **Department**.
   - If you want a tab to be created for every Site, click on **Site**.
6) Select one of the following options in the **Sort groups by** drop-down list:
   - **First Name**
   - **Last Name**
7) Select one of the following options:
   - If you want to retain your existing tabs in addition to those created automatically, click on the radio button **Append the new groups to the end of my existing groups** and then click on **OK**.
   - If you want to replace your existing tabs by to those created automatically, click on the radio button **Re-create my group structure** and then click on **OK**.
8) Click on **Save**.

You can also automatically assign attendant buttons by opening the panel's **Options** and selecting **Auto-Populate Attendant Groups**. see Opening a Panel's Options Menu on page 94.

14.5.5 Copying Attendant Buttons from a User

Prerequisites

Allow other users to copy my BLF layout must be enabled by the user, from which you want to copy the Attendant buttons.

You can copy the Attendant buttons of another user.

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⠿ to show this button.

2) Click on **Attendant Buttons**.

3) Click on the desired group under **Group Name**.

4) Click on the **Copy from user**.

A **Copy from user** pop up window appears.

5) Click on the down arrow and select the user who has the buttons you want to copy from the list.
When you select the user, a summary of the groups is displayed.

> **NOTICE:** Users that have no groups are not available for selection and will not appear in the drop down list.
>
> If there are no available users to copy from, you will see this message: **Sorry, no users have given permissions for their button layout to be copied**.

6) Click on **Save**.

The BLF groups and buttons are copied to the local user, overriding any group configuration that the local user may already have.

> **NOTICE:** You do not have the option to copy the Personal contacts of the user.

You can also automatically assign attendant buttons by opening the panel's **Options** and selecting **Copy from user**. see Opening a Panel's Options Menu on page 94.

14.5.6 Changing Attendant Buttons Number

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⠿ to show this button.

2) Click on **Attendant Buttons**.

3) Select a number from the drop-down list, in the **Number of attendant buttons** field.

4) Click on **Save**.

You can also change the number of attendant buttons by opening the panel's **Options** and selecting **Number of attendant buttons**. see Opening a Panel's Options Menu on page 94.

14.6 Queue Visibility

As an agent you can select which queues should be displayed in the agent binding list.

14.6.1 Customizing Queues Display

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

1) Click **Setup**.

If required, click on the ⁝⁝⁝ to show this button.

2) Click on **Queue Visibility**.

3) Move the sliders of the queues to be displayed in the agent binding list to ON. Alternatively, click on **Show all** to display all queues.

4) Move the sliders of the queues not to be displayed in the agent binding list to OFF. Alternatively, click on **Hide all** to hide all queues.

5) Click on **Save**.

14.7 Hot Keys

Through the use of hotkeys, you can speed up your work with myAgent.

Global Hot Keys are not migrated when updating myAgent.

NOTICE: Configured hotkeys must be unique and function globally across all applications, such as myPortal for Desktop, myPortal for Outlook, and myAgent. The first application to claim the hotkey will retain exclusive access; any subsequent applications attempting to use the same configured hotkey will fail to bind it. To prioritize a different application for the hotkey, restart all relevant applications, ensuring the preferred one starts first. Alternatively, close the conflicting application, reopen the setup, and click 'save' to refresh the hotkey services.

14.7.1 Activating or Deactivating Global Hotkeys

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Hot Keys**.
3) Click on **Hot Key Enabled** next to one of the following: **Answer / Release Call**, **Transfer**, **Display ScreenPop**.
4) If you want to deactivate a hotkey, clear the **Hot Key Enabled** check box next to that key.
5) Press the `Ctrl+Shift`, `Ctrl+Alt` or `Shift+Alt` key combination together with one of the function keys `F1`-`F12`. If the pressed key combination can be used for myAgent, this is displayed.
6) Click on **Save**.

14.7.2 Configuring Application Hot Keys

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Hot Keys**.
3) If you want to assign a function key to one of the available application hot keys, select it in the drop-down list associated with the function (**Function keys** column).
4) If you want to assign a number pad key to one of the available application hot keys, select it in the drop-down list associated with the function (**Number pad keys** column).
5) Click on **Save**.

INFO:

If you accidentally press a function key or assign a key on the numeric keypad twice, an error message will appear on saving the entries, and you can then correct the invalid entry.

14.7.3 Resetting Application Hot Keys

Step by Step

1) Click on **Setup** in the sidebar.

   If required, click on the ⠿ to show this button.
2) Click on **Hot Keys**.
3) Click on **Reset Hot Keys**.
4) Click on **Save**.

14.8 Sensitivity

Allows you to configure whether other users will be able to see the caller you are talking to and if they can copy your BLF layout.

14.8.1 Allowing Users to Copy your BLF Layout

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⠿ to show this button.

2) Click on **Sensitivity**.

3) Select the **Allow other users to copy my BLF layout** check box.

14.8.2 Allowing Users to See Caller Details

Step by Step

1) Click on **Setup** in the sidebar.

If required, click on the ⠿ to show this button.

2) Click on **Sensitivity**.

3) Select the **Allow other users to see who I am talking to** check box.

14.9 Miscellaneous

You can configure a default method for call transferring and enable or disable the live search feature.

Miscellaneous settings are not migrated when updating myAgent.

14.9.1 Configuring a Transfer Method

Step by Step

1) Click **Setup**.

2) Click on **Miscellaneous**.

3) Select one of the following options in the **Transfer Method** drop-down list:

- If you want to use blind (i.e., unscreened) transfer, select **Blind Transfer**.
- If you want to use consultation (i.e., screened) transfer, select **Supervised Transfer**.

4) Click **Save**.

14.9.2 Enabling or Disabling Live Search

When Live Search is deactivated, users have to click on **Search** in the search window to find contacts. When Live Search is activated search results appear as users type in the search field.

Step by Step

1) Click on **Setup**.

   If required, click on the ⠿ to show this button.

2) Click on **Miscellaneous**.
3) Select one of the following options:
   - If you want to enable searching while typing a name, select the **Enable live search** check box.
   - If you want to disable searching while typing a name, clear the **Enable live search** check box.
4) Click on **Save**.

15 Starting VSAdmin

Prerequisites

You are an agent with the authorization level of a Supervisor or Administrator.

Step by Step

Click on the **Admin** button in the sidebar.

If required, click on the to show this button.

VSAdmin opens in WMB.

16 Appendix

The Appendix provides details on the different authorization levels (classes of service) of contact center agents, possible restrictions on using system features, and the various call number formats. In addition, it also includes notes on the simultaneous usage of myAgent and other UC Suite clients via one UC Suite user account.

16.1 Agent Functions Independent of the Authorization Level

When an agent is configured by the administrator of the communication system, the rights of the agent are defined by selecting the authorization level (Agent, Supervisor or Administrator). An agent with the authorization level of a Supervisor or Administrator has elevated privileges.

The differences between the authorization levels are summarized in the following table.

myAgent:	**Authorization level (class of service)**		
Activity	**Agent**	**Supervisor**	**Administrator**
Assign an agent to a queue	–	X	X
Move an agent to another queue	–	X	X
Remove an agent from the queue	–	X	X
Change the status of an agent	–	X	X
Display / hide the agent binding list	Assigned queues	All queues	All queues
Edit an agent assignment	–	X	X
Display list of Contact Center calls	Assigned queues	All queues	All queues
Activate myAgent screen pop automatically for alarms	–	X	X
Activate alarm tone	–	X	X
Display wallboard	Assigned queues	All queues	All queues
Display the Grade of Service graph	Assigned queues	All queues	All queues

myAgent: Activity	Authorization level (class of service)		
	Agent	**Supervisor**	**Administrator**
Display the Average Times graph	Assigned queues	All queues	All queues
Move call to first position in a queue	–	X	X
Record a call	Current call	All calls	All calls
Save recording of call as WAV file or send as WAV file by email	–	X	X
Save fax as file or send by email	–	X	X
Save email as EML file or send as EML file by email.	–	X	X
Call Supervision (country dependent)	–	X	X
Overriding a Call	–	X	X
Accept a request for assistance	–	X	X
Create reports	–	X	X
Open WBM	–	X	X

16.2 Notes on Using myAgent and UC Suite Clients Simultaneously

When myAgent and other UC Suite clients are used simultaneously via one UC Suite user account, the possibility of mutual interactions cannot be excluded.

The term myPortal is used generically in this section to represent myPortal for Desktop, myPortal for Outlook and myPortal to go.

Examples of mutual interactions:

- Changing the presence status via myPortal

  The examples apply to the default **Voicemail** setting for all call forwarding destinations.

  - myAgent: Agent is logged on.

    myPortal: The automatic reset of the presence status to Office is disabled.

    Changing the presence status via myPortal causes the agent to be immediately logged out of the queue(s). After the agent logs off via myAgent, the presence status in myPortal is reset to **Office**.

A change in the agent status via myAgent (e.g., to **Break**) is registered by myPortal, but this does not apply to **Log in**, **Log out** and **Work Time**.

- myAgent: Agent is logged on.

  myPortal: The automatic reset of the presence status to Office is enabled.

  If the agent changes his or her status via myAgent to **Break**, he or she will be automatically available again after the break time has expired.

  A change of the presence status via myPortal to **Break** causes the agent to be immediately logged out of the queue(s).
- myAgent: Agent is logged on.

  A change of the presence status via myPortal to **Do Not Disturb** causes the agent to be immediately logged out of the queue(s).

• Outbound Calls via myPortal

  The presence status of the subscriber is visible via myAgent.

  The calls appear only in the journal of myPortal. No transfer to the statistics of the Contact Center occurs, since these are not Contact Center calls.

• Incoming calls to the station number of the agent

  The presence status of the subscriber is visible via myAgent.

  The calls appear only in the journal of myPortal. No transfer to the statistics of the Contact Center occurs, since these are not Contact Center calls.

• Recording a call

  The recording of calls via myPortal is not registered by myAgent. myAgent offers this function even if the recording of a call is already occurring via myPortal.

16.3 Notes on the Use of DECT Phones

DECT telephones can be used as phones for contact center agents. However, the differences in the operating procedure as compared to corded phones must be taken into account.

Prerequisites for the Use of DECT Phones

- Only the DECT telephones that are currently released for operation with HiPath Cordless Office and OpenScape Business Cordless may be used.
- The area within which the contact center agents move about must provide a complete wireless coverage.
- The number of base stations must be such that enough B-channels are available for the DECT telephones of the contact center agents.

- As far as possible, a contact center agent should not leave the wireless range while logged into a queue of the contact center.

Differences in the Operating Procedure as Compared to Corded Phones

- Logging into a queue of the contact center is only possible through myAgent.
- No messages such as **Available** or **Break**, for example, appear in the display of the DECT telephone.
- The control of a DECT telephone via myAgent (e.g., via the **Telephony** area of the myAgent main window or the screen pop of the incoming myAgent call) is not possible.
- Incoming calls can only be accepted via the DECT telephone.
- Outbound calls must be initiated via the DECT telephone.

Aspects to be considered when using DECT phones:

- Search time

  For an incoming call, the time required to find the DECT telephone may take several seconds (at worst up to 20 seconds) before a call is signaled on the DECT telephone. During the search time, the caller hears the ringing tone.

  The contact center evaluates this time as "pickup time". The actual pickup time by a contact center agent thus consists of the search time and the alert time (i.e., time until the call is answered).

  If a contact center agent leaves the wireless range with his or her DECT telephone, this may result in longer search times.
- DECT telephone cannot be found

  If a contact center call exceeds the prescribed time for a call to be answered by the agent (e.g., because the contact center agent is out of range), the agent is automatically logged out of the queue or queues involved. Logging in again is only possible through myAgent.

16.4 Restrictions on Using System Features

During the operation of the Contact Center, there are some restrictions on the use of system features by agents.

The following system features are not available to agents or are subject to restrictions. These features are, however, not mandatory for agents, since the allocation of calls is handled automatically by the Contact Center. The allocation depends on the set rules and the availability of agents.

- Locked Features

  As soon as a subscriber of the communication system is configured as an agent, the following features are no longer available.

  - Second call
  - Call waiting
  - Intrusion on an agent call (exception: agents with the authorization level of a Supervisor or Administrator)
  - Group Call
  - Do Not Disturb (for logged in agents)
- Features that affect call routing

  The following features could potentially change the call routing in the contact center and should therefore not be executed by agents.

  - Call forwarding

    If a logged in agent activates call forwarding, a logout occurs.

    Call forwarding is disabled as soon as an agent logs into a queue.
  - Do Not Disturb

    If a logged in agent activates Do Not Disturb via a UC Suite client, an automatic logout occurs.

    Do not Disturb is disabled as soon as an agent logs into a queue.
  - Relocate

    Relocating a telephone changes the logical assignment of the station number. The new station number assignment is only transmitted after restarting the Contact Center.
  - Group

    Agents are not allowed to be members of a group (Group Call, Hunt Group) or a MULAP. This restriction also applies to system features used in combination with MULAPs, i.e., Team Configuration (Team Group), Executive/Secretary (Top Group) and Mobility Entry.

16.5 Call Number Formats

Call numbers can be specified in different formats.

Format	Description	Example
Canonical	Begins with + and always includes the country code, area code and the full remaining station number. Blanks and the special characters + ( ) / - : ; are allowed.	+49 (89) 7007-98765

Format	Description	Example
Dialable	Exactly as you would dial the call number on the system telephone in your office, always with the trunk access code.	• 321 (internal) • 0700798765 (own local network) • 0089700798765 (external local network) • 0004989700798765 (international)

INFO: If possible, you should always use the canonical call number format. This ensures that a phone number is always complete, unique and consistent for networking and mobile stations in every situation.

When dialing an external station (dialable format) manually, the CO access code must always be dialed as well. The CO access code must likewise also be specified when manually entering the destination number (dialable format) for the CallMe service (UC Suite) in UC clients.

When dialing an external phone number in dialable format from a directory (and when using the Desktop Dialer and Clipboard Dialer for certain UC clients), the communication system automatically adds the CO access code (route 1). The automatic addition of the CO access code also occurs when you select a phone number of your own personal data (**Mobile number**, **Private Number**, etc.) as a destination number for the CallMe service (UC Suite).

NOTICE: For calls within the USA via CSTA to a number in canonical format, phone numbers are converted to the dialable format.

NOTICE: Phone numbers that are stored in local Outlook contacts should not have any non-digital characters in the last 4 digits and the minimum number of digits for extensions entry must be 4, otherwise the Exchange server will no be able to search the phoner number and much the contact you are searching.

Related tasks

Initiating a Call on page 37

16.6 Display of System Shortages

The OpenScape Business uses Digital Signal Processor (DSP) for transcoding the payload from ISDN/ TDM to IP and vice versa. The available DSP resources are managed dynamically by OpenScape Business. The amount of required DSP channels depends on the connected trunks and devices on one hand and on the call traffic on the other hand.

DSP Channel Resources

In case the OpenScape contact center cannot transfer a call to an agent due to missing DSP resource for three times, the following alarm message will be displayed in a pop up window at the agent´s desktop:

```
A call cannot be handled at this time due to limited system
 resources. Please contact your technical support.
```

If this message appears, the agent is temporarily disqualified for that particular call. Other calls will be sent to the agent as normal. The call which could not be delivered is sent to other available agents within the queue. If the call is sent to all agents without success, it is sent to the first agent again. The pop up window is automatically closed at the agent´s desktop, as soon as the call is successfully delivered to another agent. The DSP channel shortage can be remedied either by plugging an additional DSP module to OpenScape Business mainboard (X models only), or by avoiding TDM/ IP transcoding. This can be realized by replacing the agents’ TDM phones with IP phones.

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