A MITEL
PRODUCT
GUIDE

Unify OpenScape Contact Center V11 R1

Agent Portal Web V11 R1

Agent Portal Web

User Guide

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Contents

1 About this operating manual

About this operating manual

This user guide describes how to use web based Agent Portal. All work steps required to use this application are shown clearly and user-friendly.

1.1 Terms and typographical styles

1.1.1 Formatting

The table below describes the text formatting styles used in this operating manual and what they mean.

Formatting	Meaning
Bold	User interface elements that are clicked, selected and/or enabled, i.e. normally buttons, checkboxes, option buttons, menu items
"Quotation marks"	User interface elements normally called by their name, i.e. normally names of dialog windows, other windows, icons, fields, work areas, tabs, columns
Bold italics	Database names, variables, file names
UPPERCASE	Keys (SHIFT, CTRL, ALT)
Italics	Commands and examples
`Courier`	Output texts and error messages, parameters, source texts

Table 1 Typographical styles

1.1.2 Terminology

The following terms describe activities that are performed using the keyboard or mouse, as well as states of the command buttons on the screen.

Term	Meaning
Press	Press a keyboard key.
Enter	Type in letters, digits, database names, variables.
Enter	Press the acknowledgement key (ENTER or Return Key).

Table 2 Terminology

Term	Meaning
Double click	Press the left mouse button twice in quick succession.
Right-click/right mouse button	Press the right mouse button once.
Select or highlight	Click on an element once with the left mouse button.
Drag	Select an object and then press and hold the left mouse button while moving the object to a new position.
Drop	Release the left mouse button to let go of the dragged object. This step always follows a "drag".
Active/enabled	Active commands are displayed on the screen in black text, which means that they are now available to the user. Active symbols are displayed in their normal colors when they are available.
Deactivated/not released	Deactivated commands and symbols are displayed in gray, which means that they are not available to the user.
Button/icon	Button for triggering functions.

Table 2 Terminology

1.1.3 Note

The following notes are used in this operating manual:

Note: Indicates useful information important for the workflow.

Important: Indicates a situation that may cause functional malfunctions or material damage.

1.2 List of abbreviations

Abbreviation	Meaning
GUI	Graphical User Interface
HSB	Hue, Saturation, Brightness - color space
OSCC	OpenScape Contact Center
RGB	Red, Green, Blue - color space

Table 3 Abbreviations in this operating manual

Abbreviation	Meaning
SW	Software
UC	Unified Communications

Table 3 Abbreviations in this operating manual

2 Agent Portal Web - Brief Introduction

Agent Portal Web is the web-based Agent Portal application, that provides many tools to help OpenScape Contact Center agents respond to contacts, track contact activity, perform callback, and quickly find the information that they need. For Agent Portal Web there is no need for firewall configuration, you can access it through a browser and is faster than the Java version.

Agent Portal Web enables the agents to control various phone functions such as:

- dialing phone numbers
- accepting, transferring, holding and terminating calls
- performing callback
- receive and answer routed Web Collaboration
- handling e-mails
- using the **360° Conversation** feature, meaning all interaction with the customer together with the customer's data, such as their phone number, e-mail, home/office address, birthday and others
- chatting with other agents
- CLIP for outgoing calls

A speed list is embedded in Agent Portal Web with search functionality and addition of contacts.

Moreover the agents are able to customize many of the application's features to suit their preferences and working style.

3 Starting Agent Portal Web

3.1 Initial start-up

Prerequisites

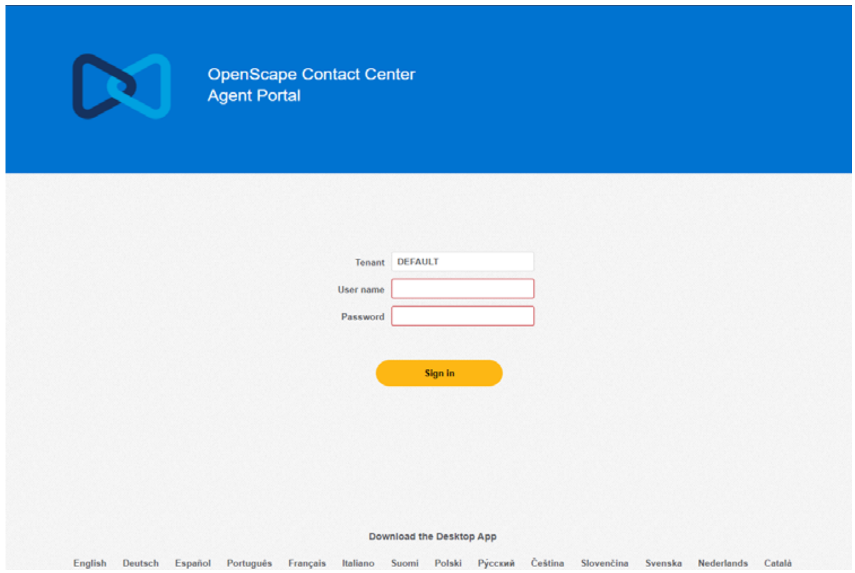
Agent Portal Web is a web based application. In order to use it, you have to have access to a web-browser. You can use the following web-browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge

Procedure

1. Enter the address of the web page in the address line of your browser, for example

   https://<OSCC_ApplicationServer_hostname_or_ip>/agentportal

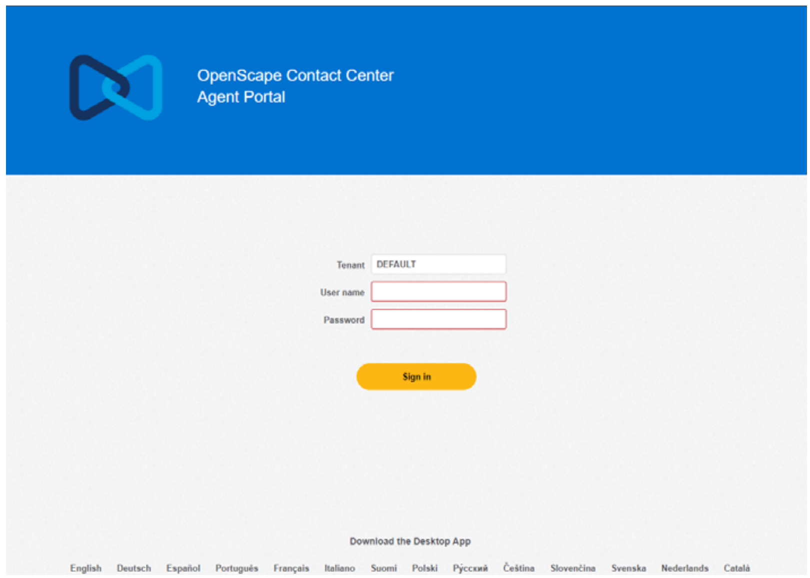


2. For information on how to log in to Agent Portal Web, see Section 3.2, “Logging on to Agent Portal Web”.
   The Agent Portal Web main window opens.

3.2 Logging on to Agent Portal Web

Prerequisites

The "Logon" window is displayed when you give the Agent Portal Web url:



Procedure

1. When logging on for the first time enter the tenant you have been assigned to. (Your selection will be stored for future logins).
2. Enter your personal data (User name, Password) in the relevant fields.
3. Click on the preferred language link available.
4. Click **Sign in**.

   The main window of Agent Portal Web is displayed.
5. In case you want to use a different language, such as German, Spanish etc you can do it at this stage.

Note: Use SAML2 authentication, to allow users to login automatically. For more information, please refer *“Single Sign On using SAML2” in the OpenScape Contact Center V11 R1, Web Manager, Administrator Documentation.*

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4 User interface and basic configuration

4.1 Header and Functions

1. **Agent's extension**

   When you click on the agent's extension icon, a new window opens where you can enter a new extension number.

2. **Make a call**

   When you click on the phone icon a drop down menu opens where you can either enter a number or select from a list of already dialed numbers.

   After entering/selecting the number you want to call, you need to click on the telephone symbol on the right side of the menu to make a call.

   A keypad is available to the agent during a call via the Integrated Phone to perform DTMF post dialing. The keypad has the following characteristics:

   - Display of the dialed digits
     - The digits are unclear
     - An icon allows you to remove the unclearness
   - Digits include the representation of the alphabetic characters.

   A Mute button allows you to mute the microphone, when participating in a call

   

3. **Create callback**

   When you click on the + icon a drop down menu opens where you can request a callback.

4. **Preferred device selection**

   When you click on the Preferred device selection icon a drop down menu opens, where you can select your preferred device, change its settings or set up call forwarding. The drop down menu has the following options:

- Desk Phone
- Integrated Phone

Note: This option is only available if the user is logged in to an OpenScape Voice switch.

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1. When you select the **Integrated Phone** option, the Audio Settings icon appears next to the Preferred device icon.

2. Click the icon. A drop-down menu with the **Audio settings** appears.
3. Select your preferred **Audio Output** and **Microphone** device
4. Click More Options and you will be transferred to the **Audio Settings** tab. See more in Section 4.13.4, “Audio”

5. **Contact Center toolbar**

In this area you can select which medium/media (voice, callback, email, web collaboration) you will be logged on to.

Note: You will only be shown the icons for the media you have access to.

For details refer to Chapter 5, “Contact center functionality”.

6. **Routing status**

In this area you can see your current status and change it to the right one. You can select between Available, Unavailable, Working and Post-processing.

7. **Avatar**

In this area your avatar is displayed. An avatar is an image or a photo representing you in the Contact Center.

By clicking on your avatar a pop-up window is displayed where you can browse your computer for an image in order to set it as your new avatar

8. **Menu (username)**

Click on the arrow next to your name and a drop down menu opens with the following functions:

- Exit
- Request Assistance (Only if user has the permission)

4.2 Broadcaster

Note: The Broadcaster feature is only available if the Administrator has enabled it for you. When the Administrator enables/disables the feature, Agent Portal will automatically display/hide it. No action is required from the agents.

The Broadcaster displays announcements as well as general and statistical information about the contact center.

4.3 Tabs and Work areas Overview

You can switch between the different work areas by using the available tabs on the left side of the screen.

Tab	Description	Refer to
Active contacts	Shows all active contacts and their details.	Section 4.4, “Active Contacts area”
Speed List	The Contacts area can be used as your personal phone book.	Section 4.5, “Speed List area”
Team List	The members of your team and their statuses are listed here.	Section 4.6, “Team List area”
Queues	Shows information about the queues that the user can monitor.	Section 4.7, “Queues area”
Activity log	The activity log displays your recent activity. This includes call, callback and web collaboration history.	Section 4.8, “Activity Log area”
Personal performance	In this work area you can find statistics regarding your personal performance.	Section 4.12, “Personal Performance area”
Settings	All settings regarding Agent Portal’s functionality are gathered in this work space.	Section 4.13, “Settings area”

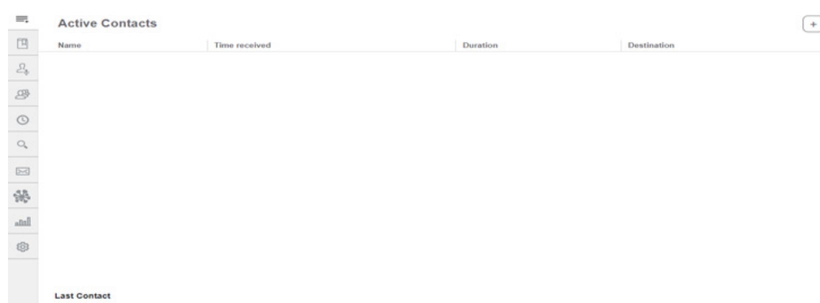
Table 4 Tabs

Tab	Description	Refer to
System Messages	All messages regarding system status can be found in this work space.	Section 4.14, "System Messages area"

Table 4 Tabs

4.4 Active Contacts area

4.4.1 Overview



In this area you can see a list of all contacts you are currently handling and details of the previous active contact.

4.4.1.1 Adjusting columns

In the **Active Contacts** work area the following columns are shown by default:

- Name
- Time received
- Duration
- Handling State
- Duration not primary
- Destination
- Priority
- Description

You can also show or hide additional columns. Depending on the configuration, each agent is able to view and show or hide different columns.

Procedure

Columns can be shown or hidden using +. The procedure is outlined in Section 4.15.1, “Column configuration in work areas”.

The available columns are described in Section 4.4.1.2, “Active contacts details”.

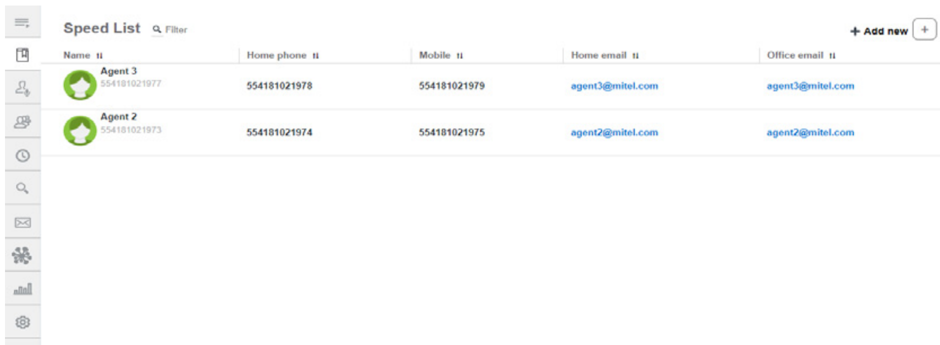
4.4.1.2 Active contacts details

Column	Description
Name	Indicates the **media type** (voice, callback, web collaboration) the **name** of the contact and its phone number.
Time received	When was the contact offered.
Duration	The sum of **Processing** and **Duration not primary**.
Handling state	Provides information about how a contact is being handled.
Duration not primary	The time period during which the contact was not primary.
Destination	The destination of the contact you received
Priority	Priority of the contact ranging from **1** (lowest) to **100** (highest).
Description	For transferred contacts the description linked to the queue of the contact. No information is included here for direct contacts.

Table 5 Columns in the Active Contacts work area

4.5 Speed List area

4.5.1 Overview



Agent Portal Web users have their own personal phone book where they can save their contacts' details and/or access the company directory that is connected with Agent Portal Web.

The agents can also use the **Speed List** work area to search for details of people whose data are stored in Agent Portal Web or contact them (phone call) directly, or even to consult the calendar events of the contacts.

In the following sections you can find details on how to:

- Adjust columns
- Call a contact
- Create a new contact
- Edit a contact
- Delete a contact
- Consult calendar events of a contact

4.5.1.1 Adjusting columns

Procedure

You can show or hide columns by clicking on +. The procedure is outlined in Section 4.15.1, "Column configuration in work areas".
The available columns are described in Section 4.5.1.2, "Contacts details".

4.5.1.2 Contacts details

Column	Meaning
Name	First name, Last name and main phone number of the contact.
Home phone	Home phone number of the contact
Mobile	Mobile phone number of the contact
Office email	Office email address of the contact
Home email	Home email address of the contact

Table 6 Columns in the Speed List area

4.5.2 Calling a contact from the Speed List

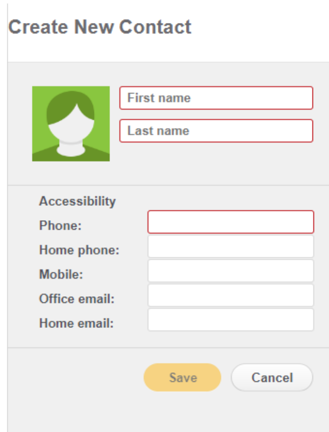
Procedure

1. Search for the contact you wish to call:
   - manually select the contact from the list.
   - type the name of the contact in the text field "Filter".
     Agent Portal Web will start searching the contacts list for the name you typed.
2. Start the call:
   - For a contact with one phone number:
     Hover the mouse over the contact of your choice and click on that appears.
   - When a contact has several phone numbers, a screen pop menu is shown with the available phone numbers: Select the required phone number and click on .

4.5.3 Create a contact in the Speed List

You can create a new contact manually.

4.5.3.1 Creating a new contact



Prerequisite

The **Contacts** work area is open.

Procedure

1.Click on the **+ Add new** button located in the upper right corner.
The "Create New Contact" dialog opens.

2.Fill in the mandatory fields
First name, **Last name** and **Phone**.
Optionally fill in the rest of the fields.

3.Click **Save**.

Note: If a required input field is not filled or contains wrong data, the **Save** button will be unavailable

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4.5.4 Displaying contact details in the Speed List

Prerequisite

The **Contacts** work area is open.

Procedure

Select a contact by clicking on it.
The "Contact Details" dialog opens.

4.5.5 Editing a contact in the Speed List

Prerequisite

The **Contacts** work area is open.

Procedure

1. Select the contact you want to edit by clicking on it.
   The "Contact Details" dialog opens.
2. Click on .
   The fields in "Contact Details" dialog become editable.

3. Edit the fields you wish.
4. Click **Save**.

4.5.6 Deleting a contact from the Speed List

Prerequisite

The **Contacts** work area is open.

Procedure

1. Select the contact you want to delete by clicking on it.
   The "Contact Details" dialog opens.
2. Click on the "Delete contact" icon.
   The contact is removed from your personal phone book.

4.5.7 Consult calendar events on Speed List

Prerequisite

The **Contacts** work area is open.

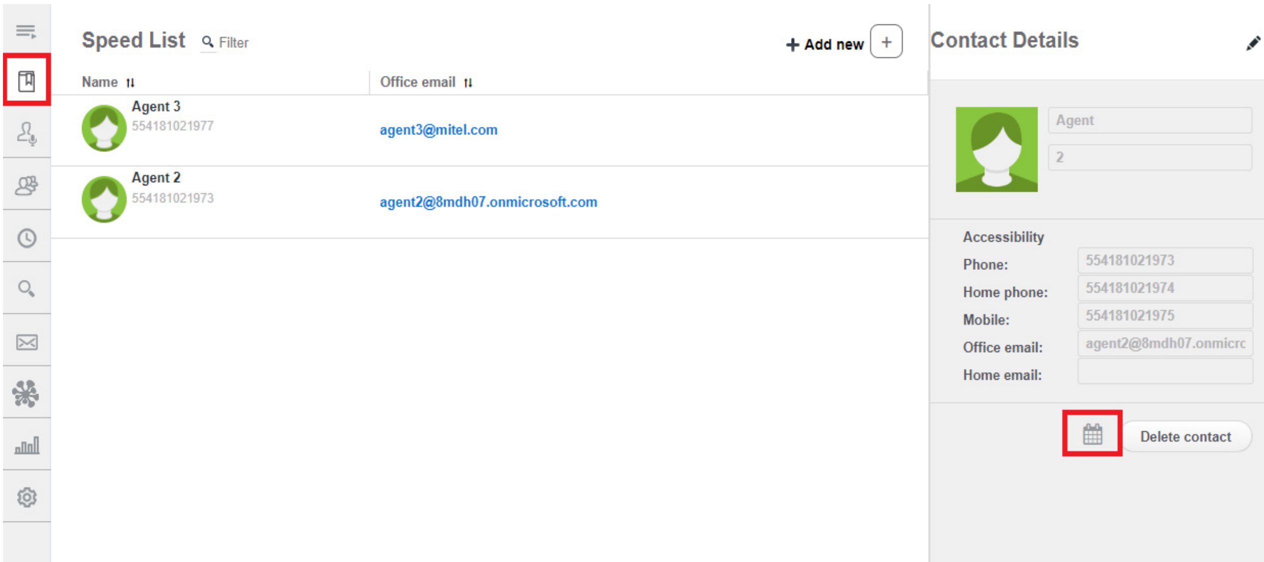
Procedure

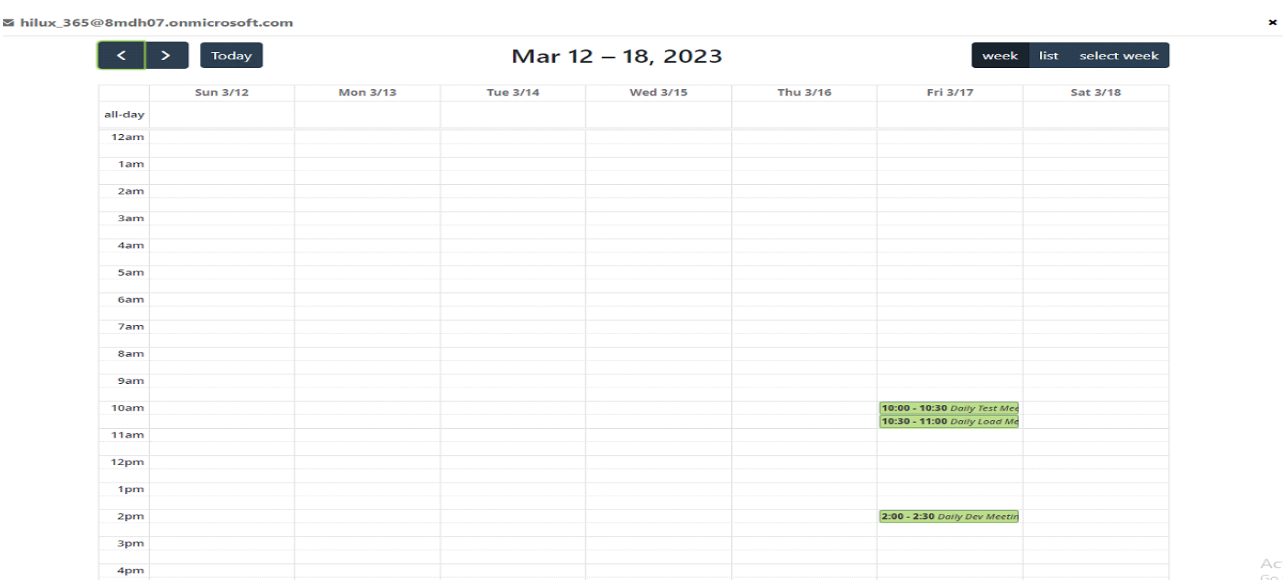
- Select a contact by clicking on it.
  The "Contact Details" dialog opens.
- By clicking the Calendar icon, a new Window is opened with the Calendar of the corresponding user on a per Week screen. In this calendar window, it is possible to select between Week mode and Events mode. By default the current week is presented but it is also possible to select the week to be viewed.

  Note: If more than one email address is available in the Directory Search entry, a modal is presented to the agent, so that he/she can choose the desired email to be used in the Calendar.

  Note: Only Online Exchange emails support access to the Calendar.

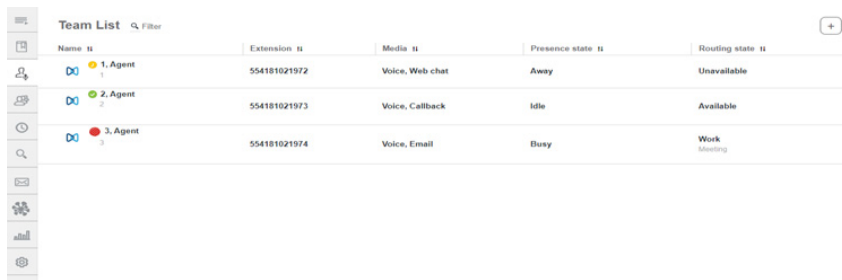
- If the agent clicks on an email address, the email tool which is configured in the OS will be opened with the email already selected as the destination.


Speed List
Filter
Add new
Name
Office email
Agent 3
554181021977
agent3@mitel.com
Agent 2
554181021973
agent2@8mdh07.onmicrosoft.com
Contact Details
Agent
2
Accessibility
Phone:
554181021973
Home phone:
554181021974
Mobile:
554181021975
Office email:
agent2@8mdh07.onmicrc
Home email:
Delete contact


hilux_365@8mdh07.onmicrosoft.com
Today
Mar 12 – 18, 2023
week
list
select week
Sun 3/12
Mon 3/13
Tue 3/14
Wed 3/15
Thu 3/16
Fri 3/17
Sat 3/18
all-day
12am
1am
2am
3am
4am
5am
6am
7am
8am
9am
10am
11am
12pm
1pm
2pm
3pm
4pm
10:00 - 10:30 Daily Test Mee
10:30 - 11:00 Daily Load Me
2:00 - 2:30 Daily Dev Meetin

4.6 Team List area

4.6.1 Overview



In the **Team List** work area you can see a list of the agents in your team and their details and call them as well.

4.6.1.1 Adjusting columns

In the **Team List** work area the following table columns are shown by default:

- Name
- Media
- Presence state
- Routing state

You can also show or hide additional columns. The columns available to the agents depend on the configuration.

Procedure

Columns can be shown or hidden using +. The procedure is outlined in Section 4.15.1, “Column configuration in work areas”.

The available columns are described in Section 4.6.2, “Team List details”.

4.6.2 Team List details

Column	Meaning
Name	The **name** of the agent together with an indication of their **presence state** (available, unavailable, work) using icons, and their **ID**.
Extension	The **extension number** that the agent is using.
Group	The **name of the group** which the agent is a member of.
Department	The **department** that an agent is on.
Media	**Medium/media** which an agent is currently logged on to: Voice, Callback, Web Collaboration.
Presence state	Current **presence state** of an agent: Available, Unavailable, Work, Not Logged on
Routing state	Current **routing state** of the agent: Available, Unavailable or Work.
Handling state	Current **handling state** of an agent: Talking, processing, holding, consulting, ringing, dialing, pending, post-processing
Contact type	Contact type(s) that has been handled by the agent: Voice, Callback, Web Collaboration
Active contacts	**Number of contacts** the agent is currently **handling**.
Contacts waiting	**Number of contacts** in the **queue**.
Description	Displays the content from the Settings > Description field in the General tab from the **Voice Enqueue: Other Call** window.

Table 7 Columns in the Team List area

4.6.3 Agent state in the Team List

Icon	State	Meaning
	Available	The agent is logged on and ready.
	Unavailable	The agent is logged on but unavailable.
	Work	The agent is logged on and busy.
	Not logged on	The agent is logged off.

Table 8 Icon meanings

4.6.4 Calling an agent from the Team List

Prerequisite

The **Agents** work area is open.

Procedure

1. Search for the agent to be called:
   - manually select the agent from the list
   - type the name of the agent in the text field "Filter".
     Agent Portal Web will start searching the agents list for the name you typed.
2. Hover the mouse over the agent of your choice and click on that appears.

4.6.5 Adding an agent to the Team Bar

Prerequisite

The **Agents** work area is open.

Procedure

1. Search for the agent to be called:
   - manually select the agent from the list
   - type the name of the agent in the text field "Filter".
     Agent Portal will start searching the agents list for the name you typed.
2. Hover the mouse over the agent of your choice and click on + that appears.

4.6.6 Chatting with an agent from the Team List

Prerequisite

The **Agents** work area is open.

Procedure

1. Search for the agent to be called:
   - manually select the agent from the list

   – type the name of the agent in the text field "Filter".
     Agent Portal will start searching the agents list for the name you typed.

2. Hover the mouse over the agent of your choice and click on that appears.

4.7 Queues area

4.7.1 Overview

The **Queues** work area shows the queue events assigned to you and displays detailed information for them. You can also use the filter functionality for easier searching of the queues list.

4.7.2 Adjusting columns

The columns shown by default in the **Queues** work area are the following:

- Name
- Contacts
- Oldest contact
- Service level

You can also show or hide additional columns. The columns available to each agent depend on the configuration.

Procedure

Columns can be shown or hidden using . The procedure is outlined in Section 4.15.1, “Column configuration in work areas”.

The available columns are described in Section 4.7.3, “Queues details”.

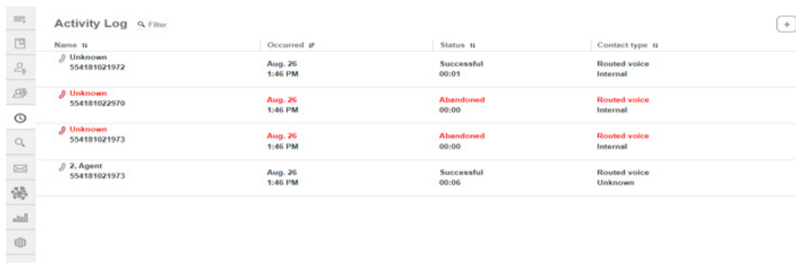
4.7.3 Queues details

Icon	Meaning
	Queue service level is below 80%.
	Queue service level is between 80 and 90%.
	Queue service level is over 90%.

Table 9 Icons for queue service level

4.8 Activity Log area

4.8.1 Overview



The **Activity Log** work area displays all of your last contacts. This includes contacts that you initiated and contacts that you received, in all media, as well as direct contacts.

An entry is created in the Activity Log every time you complete a contact. The reporting level in your contact center specifies for how long a contact is saved in the activity log.

Note: Sometimes a contact remains in the activity log longer than expected before it is deleted. This can happen because the OSCC system checks the activity log during regular maintenance, which can be at specified times and often during the night.

4.8.2 Adjusting columns

In the **Activity Log** work area the following table columns are shown by default:

- Name
- Occurred
- Status
- Contact type

You can show more columns or hide columns.

The columns viewable by each agent and which can be shown or hidden is dependent on the configuration.

Procedure

Columns can be shown or hidden using ⊹. The procedure is outlined in Section 4.15.1, “Column configuration in work areas”.

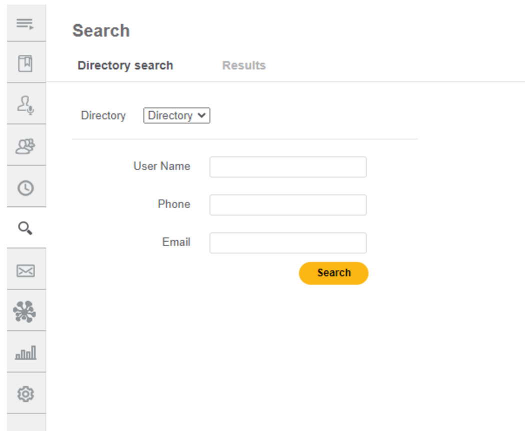
The available columns are described in Section 4.8.3, “Activity Log details”.

4.8.3 Activity Log details

Column	Description
Name	Name of the contacted person.
Occurred	Date and time when the contact was initiated.
Direction	The direction can be either Inbound or Outbound. • Inbound - a contact was offered to you. • Outbound - you have initiated the contact.
Status	The status is either Successful or Abandoned. Contacts are considered to be Successful when the following applies: • For voice, if the call was accepted. • For callback, if the callback request was accepted either manually by yourself or automatically by the system. • For Web Collaboration, if the chat session has been accepted and processed. All other cases are considered Abandoned.
Contact type	The contact type, for instance: • Routed voice • Routed callback • Direct incoming voice • Direct outgoing voice • Direct internal voice • Routed Web Collaboration
Description	For transferred contacts the description linked to the queue of the contact. No information is included here for direct contacts.

Table 10 Columns in the Activity Log work area

4.9 Directory Search area



You can use the **Search** feature to search external **directories** such as your company's directory or LDAP server in real time. This is helpful when you need to contact colleagues and customers who are outside the contact center.

To perform a directory search, the **Directory** permission must be enabled for you in the **Manager** application, and your connection settings for the directory must be properly configured. For details on how to configure the connection settings refer to Section 4.13.6, "Directories".

The search results can be further enhanced by displaying information regarding the **Presence State** of the people in the results list and by displaying the Calendar events by clicking on its icon when contact details is opened. This enhancement is only available if the administrator of the Contact Center has enabled the **Presence State** feature and Exchange Calendar integration, and you have configured the **OpenScape UC Integration settings**. For additional information regarding the **Exchange Calendar integration**, refer to Section 4.9.4, "Exchange Calendar integration on Directory Search results".

4.9.1 Searching a directory

In order to conduct a directory search you simply need to type a **name** in the search area. The directory is searched immediately and the results appear in a short time.

The results are displayed in list view and shorted alphabetically.

4.9.2 Calling a person in a directory

When you use the **Search** area to conduct a search, you can call an entry that appears in the results, provided that there is a telephone number associated with it.

To call a person in a directory:

1. Hover your mouse over the entry you wish to call.
2. Click next to the entry.

   The call is initiated immediately.

4.9.3 Presence State details

When the **Presence State** feature is enabled and properly configured, the **Search** results are enhanced by displaying the Presence State of the people in the list.

The Presence State is displayed as an **icon** on the left side of each row and as **text** on the right side.

Agent Portal displays one of the following types of Presence State for each search result:

- UC Presence State
- CC Presence State
- Line State

Depending on the data received from the Presence server, Agent Portal displays the Presence State indexed higher on the list above. To refresh the Presence State of a person in the search results, simply hover the cursor over the corresponding row and click on .

The meaning of the different Presence State icons is explained in the table below:

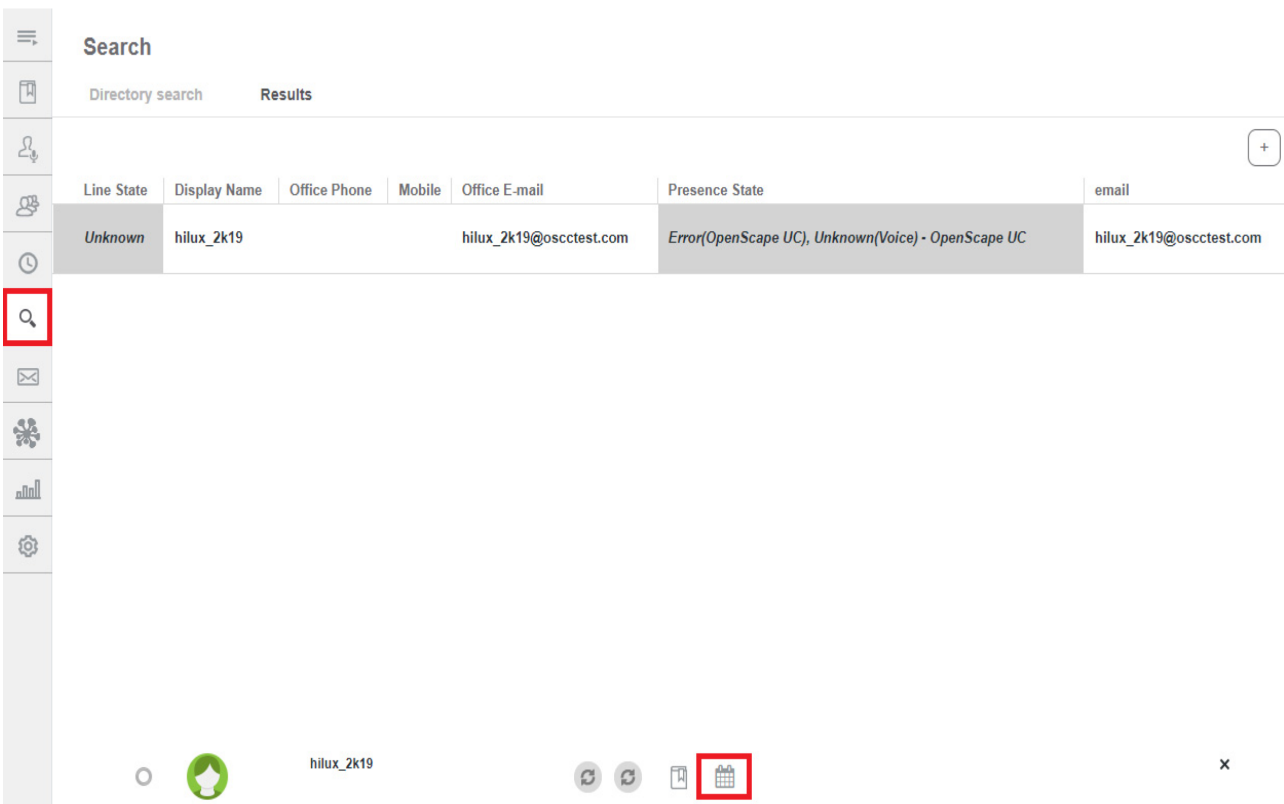
Presence State icons							
UC Presence			CC Presence			Line	
	Available			Not logged on			Line busy
	Away			Active			Ringing
	Do not disturb			Idle			Idle
	Be right back			Away			Processing
	Busy			Busy			Error
	In meeting			Unknown			
	Unknown						

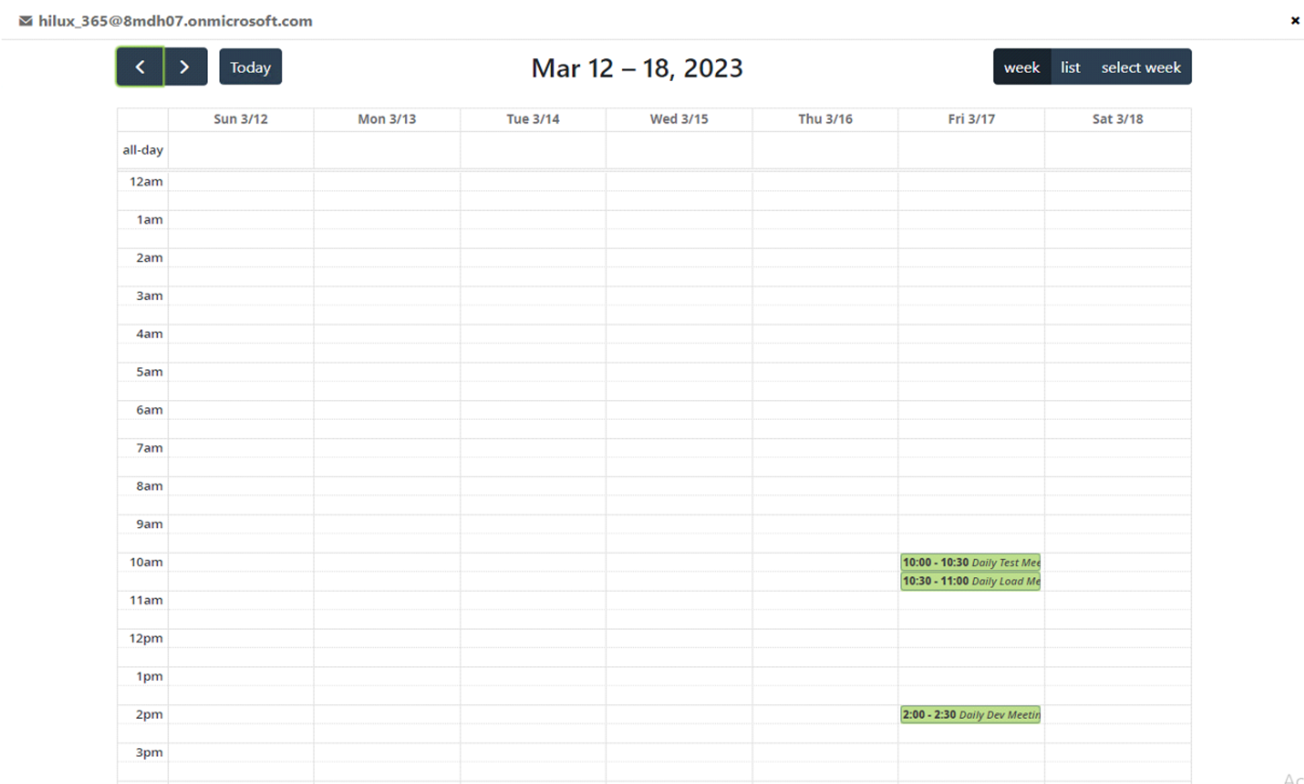
4.9.4 Exchange Calendar integration on Directory Search results

When the Calendar feature is enabled and properly configured, the Search results are enhanced by displaying the Calendar events of the people in the list. The Calendar is displayed as an icon on the left side of the selected row. By clicking on the Calendar icon, a new Window is opened with the Calendar of the corresponding user on a per Week screen. In this calendar window, it is possible to select between Week mode and Events mode. By default the current week is presented but it is also possible to select the week to be viewed.

Note: If more than one email address is available in the Directory Search entry, a modal is presented to the agent, so that he/she can choose the desired email to be used in the Calendar.

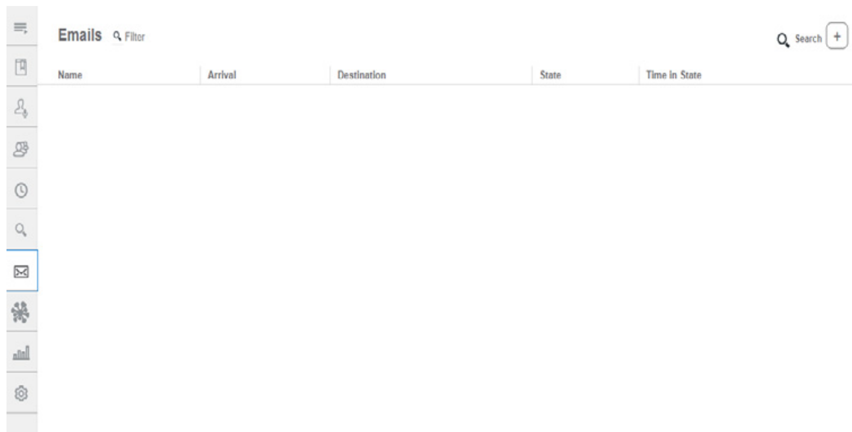
If the agent clicks on an email address, the email tool which is configured in the OS will be opened with the email already selected as the destination.




hilux_365@8mdh07.onmicrosoft.com
Today
Mar 12 – 18, 2023
week
list
select week
Sun 3/12
Mon 3/13
Tue 3/14
Wed 3/15
Thu 3/16
Fri 3/17
Sat 3/18
all-day
12am
1am
2am
3am
4am
5am
6am
7am
8am
9am
10am
11am
12pm
1pm
2pm
3pm
10:00 - 10:30 Daily Test Mee
10:30 - 11:00 Daily Load Me
2:00 - 2:30 Daily Dev Meetin

4.10 Emails area

4.10.1 Overview



In this are you can find a list with all outstanding email messages (that is, messages that have been deferred or consulted on). You can retrieve these messages when you are ready to resume handling them.

The system stores all e-mail messages, including messages that you discard. You can use the e-mail history search feature to find any message. For more information, see Section 4.10.3, “Finding recent and archived email messages”.

4.10.2 Details

Column	Description
Name	Displays the email address of the customer and the subject of the message.
Arrival	Date and time when the email arrived.
Destination	The email address to which the email was sent.
State	Handling state for the email, e.g. "Deferred" in the queue or "Reserved" for a specific agent.
Time in state	Date and time when the email was changed to its current state.

Table 11 Columns in the "E-mail" table

4.10.3 Finding recent and archived email messages

The **Search email history** feature makes it easy to quickly find a particular email message. The search includes all archived messages, including messages that are still in the Ongoing Activity Log.

You can enter the state of the message as one of the search criteria. For example, if you want to find a reply that you sent to a customer, search for the original email message and select **Replied** as the email state. If you are searching for a message that you sent and that was not related to an email message, select **Agent Initiated** as the email state.

The messages that match the search criteria are displayed on the **Search results** tab. The search results include information such as the **Destination** of each message, its **State**, etc.

Note: You are not able too use the **Search email history** feature while handling an email message.

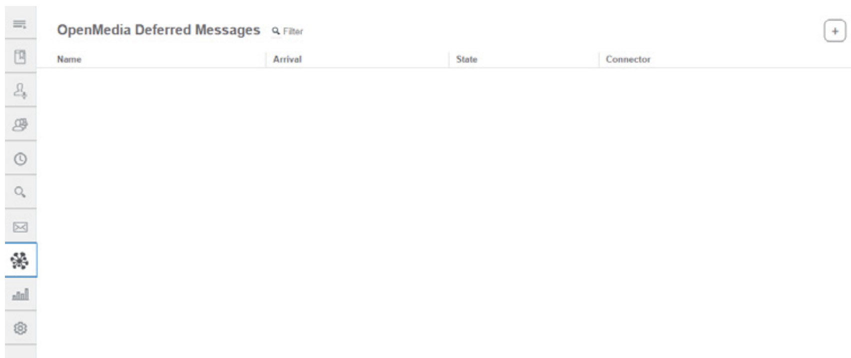
To search for an email message:

1. Click on **Search** on the upper right corner.
2. On the window that is displayed narrow the search by entering any information that you know about the email message that you are searching for.
   a) Under **Date**, enter the starting date and time and ending date and time of the interval during which the message was sent.
   b) Under **E-mail States**, click any items that describe the action taken on the message.
   c) Under **Additional parameters**, enter any other information that you know.
3. Click **Search**.

   The results of your query are displayed.

4.11 OpenMedia Deferred Messages area

4.11.1 Overview



In this are you can find a list with all outstanding OpenMedia messages (that is, messages that have been deferred). You can retrieve these messages when you are ready to resume handling them.

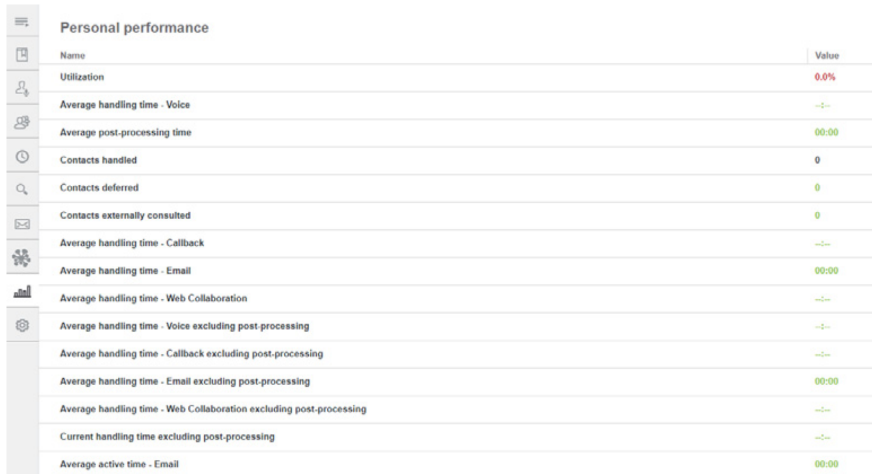
4.11.2 Details

Column	Description
Name	Displays the email address of the customer and the subject of the message.
Arrival	Date and time when the message arrived.
State	Handling state for the OpenMedia message, e.g. "Deferred" in the queue or "Reserved" for a specific agent.
Connector	Name of the Connector

Table 12 Columns in the “OpenMedia Deferred messages” table

4.12 Personal Performance area

4.12.1 Overview



In this work area continuous feedback about your work in the contact center is provided. For example, you can see at a glance the average amount of time that you are spending handling each type of contact, the amount of time that you have spent in your current state, and your Utilization rate.

Note: You can see the Personal Performance statistics for all the media that you are configured to work with. The statistics are displayed even if you are not currently handling contacts in one of these media.

4.12.2 About Personal Performance

Your personal performance statistics are updated regularly throughout the day. Statistics showing the amount of time spent in various activities are reset to zero at the start of each shift, and then calculated based on the amount of time that has passed since the start of the shift.

When you log on to the Agent Portal Web application, you might initially see "--" as the value for a statistic, but within a short time you should see a numeric value. If a statistic indicates an amount of time, the time is displayed in minutes and seconds (for example, 03:06 is 3 minutes and 6 seconds).

Personal performance statistics always reflect the activity on the server machine that the Agent Portal Web application is connected to.

Here are some examples of personal performance statistics:

Statistic	Definition
Utilization	The total amount of time that you spend handling contacts, as a percentage of your total logged-on time. Time spent handling contacts includes your actual handling times for all media types, your time spent in Busy presence state, and optionally, your time spent in Idle presence state. Whether Idle presence state is included depends on how Utilization is configured in the Manager application. If your Utilization rate falls below the threshold configured in the Manager application, the system sends a message, which appears in the System Messages window.
Average handling time - Voice	The average amount of time that you spend handling routed calls.
Average post-processing time	The average amount of time that you are in post-processing handling state.
Contacts handled	The total number of contacts that you handled, in all media, since the start of your shift.
Contacts deferred	The number of e-mail messages that you have in deferred state.
Contacts externally consulted	The number of e-mail messages that you have in externally consulted state.
Average handling time - Callback	The average amount of time that you spend handling callbacks.
Average handling time - Web Collaboration	The average amount of time that you spend handling Web collaboration sessions.
Current handling time	The amount of time spent handling the current contact. This time is also displayed in two places in the Contact Details window: on the toolbar, in the shape of a stopwatch, and on the Details tab, where it is called the Handling Time.
Average handling time - Voice excluding post-processing	The average amount of time that you spend handling routed calls, not including the time spent post-processing.

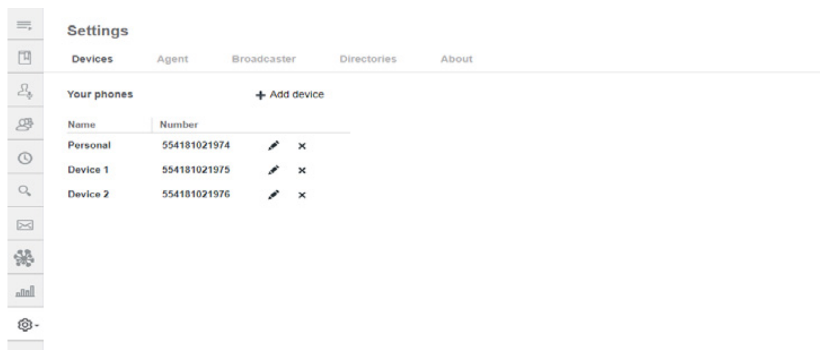
Table 13 Personal performance statistics and their meaning

Statistic	Definition
Average handling time - Callback excluding post-processing	The average amount of time that you spend handling callbacks, not including the time spent post-processing.
Average handling time - Web Collaboration excluding postprocessing	The average amount of time that you spend handling Web collaboration sessions, not including the time spent post-processing.
Current handling time excluding post-processing	The amount of time spent handling the current contact, not including the time spent post-processing.
Average active time - Web Collaboration	The average amount of time that Web collaboration sessions are active.
Average non-primary time - Web Collaboration	The average amount of time that Web collaboration sessions are active but not primary.
Current active time	The amount of time that the current contact has been active.
Current non-primary time	The amount of time that the current contact has been active but not primary.

Table 13 Personal performance statistics and their meaning

4.13 Settings area

4.13.1 Settings overview



The settings and preferences of Agent Portal Web can be adjusted according to your personal preferences and needs from the **Settings** area. The tabs in the settings area are described in the following sections.

Click the arrow next to the **Settings** icon and you can:

- See **System messages**
- See the **Help** pop-up window

4.13.2 Devices

In this tab you can see the list of your available devices. You can also add, edit and remove the devices of your choice. In Agent Portal Web you can change your device without exiting the application.

Note: The telephone number that you specify when configuring a device must be in dialable or canonical format.

Note: This option is only available if the user is logged in an OpenScape Voice switch.

4.13.2.1 Add device

Prerequisite

The Settings work area is open under Devices tab.

Procedure

1. Click on **+Add device**
   A pop-up window is displayed.

2. Type a name of the device you want to add (e.g. Desk phone) and its number.

   Click **Add**.
   Your device has been added to the list. You can now use or change to this device from the header of Agent Portal Web. Refer to Section 6.9, “Preferred device functionality”.

4.13.2.2 Edit device

Prerequisite

The Settings work area is open under Devices tab.

Procedure

1. Hover the mouse over the device you wish to edit.

2. Click on .
   A pop-up window is displayed.

3. Edit the entries of your choice.

4. Click **Change**.

4.13.2.3 Remove device

Prerequisite

The Settings work area is open under Devices tab.

Procedure

1. Hover the mouse over the device you wish to edit.
2. Click on ✕.
   The device is removed.

4.13.3 Agent

The following options are available in the Agent tab:

Change picture

1. Click on your picture (avatar).
2. On the pop-up window, select the image file of your choice.
3. Click **Open**.

Automatic media login at start

Mark the checkbox(es) of the medium/media you wish to log in to automatically when you start Agent Portal Web. You can select:

- Voice
- Callback
- Email
- Web chat

Audio Notification

Here you can configure the sound effects. You can:

- Mute everyone by marking the **Mute All** checkbox
- Allow audio notifications for the following options:
    - General
    - Telephony
    - Chat
    - Chat Messages
    - Open Media

    - Open Media Messages
    - Callback
    - Email
- Increase or decrease the volume by using the **Volume** slider
- Control the balance of the sound by using the **Pan** slider

Select a language

Select your preferred language from the drop-down menu

Password

Change your own Agent password.

1. Click **Change Password**. A pop-up window **Change password** appears
2. Configure the following parameters:
    1. **Old password**: Fill in your old password
    2. **New password**: Give a new password
    3. **Confirm new password**: Give your new password again
    4. Click **Change**

Preferred device for start

Click the radio button **Use last device** to use your previously used device. Click the radio button **Always use this device** and the drop-down list becomes configurable. Select one of the devices listed there:

- Desk phone
- Integrated phone. This option is the default when the agent has permission for WebRTC user.

You can add devices from the **Devices** tab.

Team Bar

Mark the checkbox to enable the Team Bar. By marking the **Always on top** checkbox, when the Team Bar is enabled and undocked its window will be on top of all other windows on your screen.

Speed Bar

Mark the checkbox to enable the Speed Bar. By marking the **Always on top** checkbox, when the Speed Bar is enabled and undocked its window will be on top of all other windows on your screen.

CLIP

You can define the default Calling Number from the combo box containing the configured numbers. When you start a new call, select the Calling Number which shall be used for that call.

Click the radio button **Per call** to select the default calling number. Click the radio button **Always use this value** and the drop-down list becomes configurable. Select one of the available numbers listed there. To create these calling numbers and names, see chapter **Web Manager** in *OpenScape Contact Center Enterprise/Agile V10 R2 Manager Administration Guide.*

Integrated Phone

- Enable Auto Answer: mark this checkbox to enable Auto Answer.
- Enable Video/Screen Share: mark this checkbox to enable the Video/Screen Share.

Note: Video/Screen Share requires a license in OpenScape Contact Media Service.

4.13.4 Audio

In this tab you can configure the audio devices. To do so, you must be configured to use WebRTC.

- **Audio Output**: Allows you to select between the Default audio output and the existing audio options.
- **Microphone**: Allows you to select between the Default microphone and the existing microphone options

4.13.5 Broadcaster

You can configure the Broadcaster so that it is easy to read the messages as they scroll past. You might prefer the information to move slower or faster, or you might prefer a different scroll direction (left to right, or right to left). You can also make the Broadcaster pause when you point to it.

- To change the scrolling direction, select **From Left to Right** or **From Right to Left**.

- To display the control buttons (Advance button) in the Broadcaster area, mark the **Show control buttons** check box. The Advance button appears on the right side of the Broadcaster and lets you move quickly through a message.
- To make the Broadcaster sensitive to the mouse pointer, so the broadcaster pauses when the pointer rests on it, mark the **Pause Broadcaster on mouseover** check box.
- To set the scrolling speed, move the slider along the **Slow, Medium, Fast** range.

4.13.6 Directories

All available directories are listed under this tab.

In order to connect to them you need to click on the **Edit** button and type in an **Account name** and a **Password**. Your manager or supervisor will provide you with the aforementioned credentials if needed.

4.14 System Messages area

You can access the **System Messages** work area via the following way:

- Open the **Settings** tab. Click on the **Settings** icon and from the dropdown list select **System Messages**.

4.14.1 Overview

System messages provide information about the status of the OpenScape Contact Center system and its components (for example, its servers).

Agent Portal Web saves all new messages in the System Messages area. Three types of system messages are displayed:

Icon	System message type
● (blue)	Info
● (yellow)	Warning
● (red)	Error

All system messages are saved until you log off.

4.15 Basic configuration

4.15.1 Column configuration in work areas

The columns shown in the work areas can be configured to display different information by enabling or disabling them. You can also change the position of the columns or sort their content to meet your needs.

Column configuration is saved on the server and will be available every time you launch the application.

Enable or disable columns

1. Click on the + icon located in the right edge of the table containing the columns. A pop-up menu opens with the available columns.
2. Enable or disable the columns you wish by clicking on the appropriate menu item. Every time you enable a column the pop-up menu closes and the column appears in the table.
3. Repeat step 2 for the number of columns you wish to enable / disable.

Column sequence

Click on the title of the column you wish to move and while holding the mouse button drag the column to the appropriate position.

Sort columns content

To sort the contents of a table, you need to click on the title of the column.

The first time you click, the column gets sorted in ascending order. The second time gets sorted in descending order and the third time sorting gets disabled.

5 Contact center functionality

5.1 Logging on to and off from the OpenScape Contact Center

5.1.1 Logon

Manual logon

- Log on to all media at once:
  1. On the header of Agent Portal Web click on ○.

     A menu is displayed.
  2. From the menu select **Log on to all media**.

     You are now logged on to all media and your routing status is set to “Unavailable”.
- Log on to the media of your choice:

  You can use the following icons on the header of Agent Portal Web to select what media to log on to:

Icon	Medium
	Voice
	Callback
	Web Collaboration

Note: Only the media that you are authorized to use will be displayed on your screen.

1. Click on the icon of the medium you wish to use.

   You are now logged on to the medium you selected and your routing status is set to “Unavailable”.

   Note: The icon color of the medium changes to green when you log on to it.
2. You can log on to multiple media as well by clicking on their respective icons.

Automatic logon

You can set up Agent Portal Web to login to the media of your choice automatically every time you start the application.

1. Open the **Settings** work area and click on the **Agent** tab.
2. Under the **Automatic media login at start** section select the media of your choice by checking the corresponding boxes.

   The next time you start Agent Portal Web you will be automatically logged on to the media you selected above.

5.1.2 Logoff

Procedure

- Log off from all media at once:

  1. Click on your routing status icon.

     A menu is displayed.

  2. From the menu select **Log off from all media**.

     You are now logged off from all media.

- Log off from the media of your choice:

  You can use the following icons on the header of Agent Portal Web to select what media to log off from:

Icon	Medium
	Voice
	Callback
	Web Collaboration

  Note: Only the media that you are authorized to use will be displayed on your screen.

  1. Click on the icon of the medium you wish to log off from.

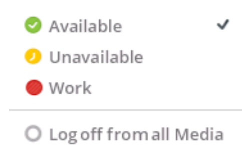
     You are now logged off from the medium you selected.

     Note: The icon color of the medium changes to grey when you log off from it.

5.2 Working with OpenScape Contact Center

5.2.1 About routing states

Once you have successfully logged on to the contact center system, your routing state indicates whether you are able to receive a new contact. The routing states are **Available**, **Unavailable**, and **Work** and next to them a timer indicates the total time in that state.



The following table shows the effect of each routing state on the ability to receive routed contacts:

Button	Routing state	Description
	Available	You are logged on to at least one of the contact media and you are free to receive routed contacts.
	Unavailable	You are logged on to at least one of the contact media but you are not available to handle routed contacts because you might be having lunch or taking a break.
	Work	You are logged on to at least one of the contact media but you are performing a work-related task not associated with a contact, and are not available to handle routed contacts. For example, you might be attending a meeting or a training session.

Table 14 Routing states

Button	Routing state	Description
	Post-processing	This button is dependent on the settings enabled for you and has two functions: **Setting post-processing reason** Press the button during the active contact when you would like to perform activities for this call after it has been disconnected (e.g. making notes or sending follow-up information). Use the right arrow to select and set a post-processing reason from the screen pop menu. If a reason is set during the active contact handling (e.g. for a voice call during the call), the contact has the status "post-processing pending". In this state the button flashes and the status can be canceled by pressing the button again. **Exit post-processing** If you have finished handling a contact, i.e. after the call in the post-processing state, the button is then highlighted in color. You can then exit the post-processing state.

Table 14 Routing states

5.2.2 Configuring Toaster Notification

Note: In the following chapters about contact handling in the various media, it is mentioned that a toaster notification can occur upon the assignment of a contact.

Toaster notification is a browser feature, that needs a browser dependent configuration.

To configure this feature, please refer to each browser documentation for instructions on how to change the settings to allow notifications and to add the web address of Agent Portal Web.

For example, please refer to the below configuration links for the following browsers:

- Chrome: https://support.google.com/chrome/answer/3220216
- Firefox: https://support.mozilla.org/en-US/kb/push-notifications-firefox
- Edge: https://support.microsoft.com/en-us/microsoft-edge/manage-website-notifications-in-microsoft-edge-0c555609-5bf2-479d-a59d-fb30a0b80b2b

6 Handling calls with Agent Portal Web

This chapter analyzes the basic operation of the telephony features available in Agent Portal Web.

OpenScape Contact Center keeps a record of all your recently completed calls in the **Activity Log**. For information about reviewing the details of a contact in the Activity Log, see Section 4.8.3, “Activity Log details”.

Most of the work handling a call is done in the **Active Contacts** work area which is the standard interface for handling all types of contacts. For more information about the **Active Contacts** work area, see Section 4.4, “Active Contacts area”.

6.1 Initiating calls

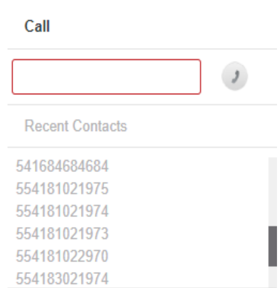
General information

Calls can be initiated in a number of ways:

- Phone numbers can be entered using the icon on the header of Agent Portal Web.
- Contacts can be called from the **Contacts** work area (see Section 4.5, “Speed List area”).
- Agents can be called from the **Agents** work area (see Section 4.6, “Team List area”).

Initiating calls

1. Click on the "Call" icon
   A pop-up menu appears:



2. Enter the phone number you wish to call.
3. Click on to it to initiate the call.

Cancel dialing

Click on .
Dialing is canceled.

6.2 Accepting a call

An incoming call is signaled visually on the top of the window below the header as shown above and a sound notification is played. If the window is minimized or it is in background, a toaster is presented along with a sound notification.

Accepting a call

Click on .
You are now connected to the caller.

6.3 Hold a call

While on a call, click on to place the call on hold.
An automated announcement and/or music will be played to the calling party.

6.4 Initiating a consultation

1. While on a call, click on located in the header of Agent Portal Web.
   As described in Section 6.1, "Initiating calls" a pop-up menu will appear to enter the phone number of the desired party to call to.
   The currently active calling party will automatically be put on hold and a second call will be initiated.
2. Consult with the second party.
3. To end the consultation click on .
   a) The connection to the second calling party is terminated.
   b) You return to the first calling party.

Further options during consultation

- **Transfer** (see Section 6.5, "Transferring calls")
  By clicking on you connect your first calling party to the second one and your disconnect from both.
- **Conference** (see Section 6.7, "Initiating conferences"
  By clicking on you initiate a conference between you and the other two calling parties.

Note: If a contact is put on hold, the call cannot be terminated directly by Agent Portal Web. The button is disabled in this state.

6.5 Transferring calls

Below you can find information regarding the different call transfer types:

- Supervised transfer
- Unsupervised transfer

6.5.1 Supervised transfer

Supervised transfer functions the same way as consultation. You get in a call with the second party before transferring the call to the first one.

For further information refer to Section 6.4, "Initiating a consultation".

6.5.2 Unsupervised transfer

In unsupervised transfer you transfer a call without getting in a call with the second party.

Prerequisite

You are in a call.

Procedure

1. Click on .
   A pop-up menu similar to the menu in Section 6.1, "Initiating calls" appears.
2. Type in the number or name of the party you want to transfer the call to and click on .
3. The two parties are connected while you get disconnected.

6.6 Requeue call

You can requeue a call when another queue would be more appropriate for the contact. When you requeue a contact, the system does the following:

1. Disconnects you from the contact.
2. Sends the contact to the selected queue.

You can requeue only incoming, routed calls. You might, for example, be the first user to handle the contact, or you might receive the contact as a transfer from another user.

Prerequisite

You are in a call.

Procedure

1. Click on .

   A menu is displayed.
2. From the menu select the queue you wish to requeue the contact to.

You are now disconnected from the contact, and the contact is sent to the queue you selected.

6.7 Initiating conferences

6.7.1 Three-party conference

After setting up a consultation call you can initiate a conference between yourself, the party on hold and the second party.

Prerequisites

You have set up a consultation call (see Section 6.4, “Initiating a consultation”).

Procedure

Click on .
The conference begins and all parties are connected.

6.7.2 Add further conference parties

If you want to add further parties to the conference, start a new consultation. The other conference parties are put on hold until the conference call is resumed.

Prerequisites

You are making a three-party conference call (see Section 6.7.1, “Three-party conference”).

Note: The maximum number of conference parties is limited by the configuration of the telephone system. The default is five participants.

Procedure

1. While on a conference, click on located in the header of Agent Portal Web.
   As described in Section 6.1, “Initiating calls” a pop-up menu will appear to enter the phone number or name of the desired calling party.
   The currently active conference will automatically be put on hold and a new call will be initiated.
2. Click on to add the new party to the conference.
   You are back on the conference with the new party as well.

6.7.3 Monitoring a conference

Prerequisite

You are in a conference.

Procedure

Click on the arrow located next to the total number of members in the conference.
A tooltip displays the parties in the conference.

Note: When a number is assigned to a contact, the name of the contact is shown in the list. Otherwise only the phone number is displayed.

6.8 Wrapping up a call

Use the **Wrap-up** tab in the side panel of the **Active Contacts** work area to enter wrap-up reasons and show how you completed a contact.

You can enter wrap-up reasons:

- While you are handling the call.
- After you disconnect from the call, provided that the **Wrap-up** tab in the side panel remains open.

If “Automatic Post-processing” is enabled for you by the administrator, you must select at least one Wrap-up reason in order to end a call.

Note: You do not have to wait until you finish handling the contact to enter Wrap-up reasons. You can select one or more Wrap-up reasons at any time. However, do not save the Wrap-up reasons until you have completed the contact, because you can perform only one Save action for Wrap-up reasons. After the Save action, you cannot enter any more Wrap-up reasons.

To wrap up a call:

1. In the side panel of the **Active Contacts** work area, click the **Wrap-up** tab.
2. Select the check box for each Wrap-up reason that applies to the contact. Only Wrap-up reasons that are associated with the contact's queue are displayed.

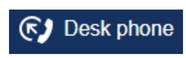
6.9 Preferred device functionality

6.9.1 Changing preferred device

In Agent Portal you are able to set up multiple devices you can use. Refer to Section 4.13.2, "Devices" for further information on how to set up and manage your devices.

After setting your devices up you can change between them on the fly.

Procedure

1. Click on the device selection button 

located in the header of Agent Portal.
2. From the pop-up list that appears select your preferred device.
Your preferred device has changed.

Note: This option is only available if the user is logged in an OpenScape Voice switch.

Note: If the system is connected to an OpenScape Voice V7 R1 or higher communication platform and you have configured the preferred device to be an external device such as a mobile telephone, you cannot perform an unsupervised transfer. You must perform a supervised transfer.

---

7 Handling callbacks with Agent Portal Web

A callback is an automated call request by the agent to a customer. Callbacks are usually created due to an earlier customer interaction with the contact center. When the callback request is answered, either by the agent or the system, the customer is called from the agent's extension.

This chapter describes how callbacks are created and accepted.

Prerequisite

In order to be able to work with callbacks in Agent Portal Web, you must be enabled for this media type in the contact center. You can then log on to the callback media type as described in Chapter 5, “Contact center functionality”.

Actions you can carry out with a callback

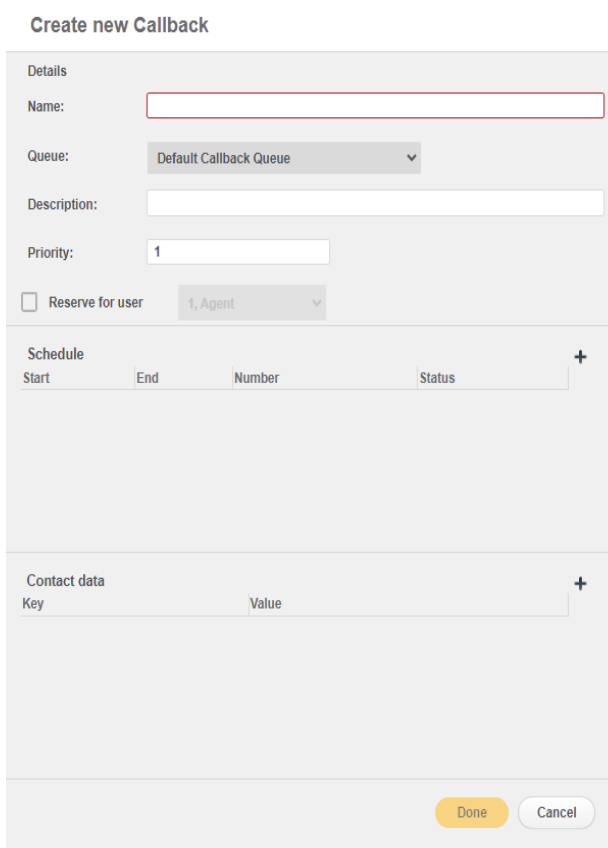
Callbacks are similar to phone calls. You can therefore carry out the same actions as for a voice contact:
Hold a call, transfer a call, initiate a conference, etc.

Note: When you work with callbacks, it is possible that you cannot see or carry out some of the functions described in this document. Some Agent Portal Web functions are controlled from and need to be enabled in the Manager Application.

7.1 Creating a new callback

Procedure

1. Click on  and select **Create callback**.
   The "Create new callback" panel opens:



2. Enter the required information for the new callback.
   For details regarding the Schedule area refer to Section 7.1.2, “Administering callback schedule”.
   For details regarding the Contact Data area refer to Section 7.1.3, “Administering contact data”.

Note: In order to save the new callback, the following fields need to be filled out: ***Name***, ***Description*** and at least one entry in the **Schedule** table.

---

3. Click **Save**.

7.1.1 Fields in the "Create new callback" panel

Field	Description
Name	Name of the customer, company name or contact person.
Queue	Assignment of the callback to a queue.
Description	Further information on the callback.
Priority	Priority of the callback (value between 1 and 100).
Reserve for user	Reserve the callback for a specific agent.
Schedule	Different dates can be saved in the schedule. It is also possible to assign a different call number to each callback date.
Contact data	Further information of the contact can be added in this area.

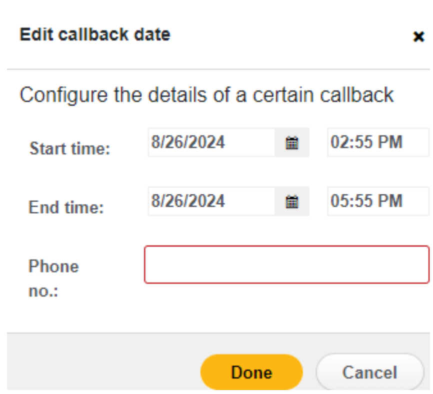
Table 15 Fields in the "Create new callback" window

7.1.2 Administering callback schedule

The following section describes the "Schedule" area under the "Create new callback" panel, and how to administer callback dates by creating, editing or deleting schedules.

Create new schedule

Click on + .
The "Edit callback date" window opens:



1. Enter the **Start time**, **End time** and **Phone number**.

Note: If the input data are wrong the respective field will be highlighted with a red frame.

2. Click **Done**.
   The new callback date is saved.

Edit schedule

1. Hover your mouse over the callback date you want to edit.
2. Click on the ✎ button next to the entry.
   The "Edit callback date" window opens.
3. Change the fields of your choice.

   Note: If the input data are wrong the respective field will be highlighted with a red frame.

   ---
4. Click **Done**.
   The changed callback date is saved.

Delete schedule

1. Hover your mouse over the callback date you want to delete.
2. Click on the ✕ button next to the entry.
   The callback date is deleted from the schedule.

7.1.3 Administering contact data

The following section describes the "Contact data" area under the "Create new callback" panel, and how to administer callback dates by creating, editing or deleting schedules.

Create new contact data

Click on ✚.
The "Edit Data Entry" window opens:

1. Fill out the fields **Key** and **Value**.
2. Click **Done**.
   The new data entry is saved.

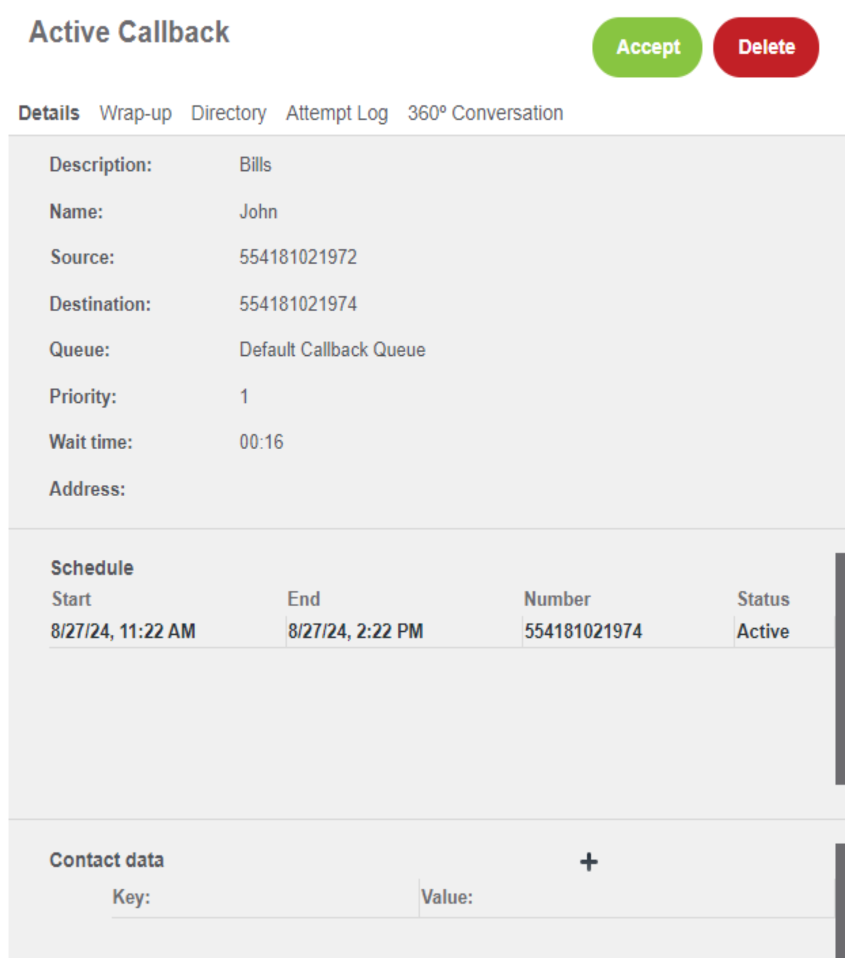
Deleting data

1. Hover your mouse over the contact data entry you want to delete.
2. Click on the ✕ button next to the entry.
   The entry is deleted.

7.2 Handling a callback

Note: To accept callbacks, you must be logged on and available for the callback contact center medium (see Chapter 5, “Contact center functionality”).

When a callback request is offered to you, the "Active Callback" panel opens as shown below and a notification sound is played. If the window is minimized or it is in background, a toaster is presented along with a sound notification.



Tabs

The following tabs are displayed in the "Active callback" panel:

- **Details:** Provides information regarding the callback and its schedule and contact data.
- **Wrap Up:** After a callback you can enable (tick is set) or disable (no tick set) the available options with a click. The options are predefined in OSCC.
- **Attempt Log:** Lists the name of the agent, the retry reason and the date of each attempt.

Delete

If you do not wish to accept a callback, you need to delete it. A reason must be entered when the callback is deleted.

1. Click on **Delete**.
   The callback is deleted.
2. A list of reasons why the callback was deleted is displayed. Select the appropriate option.

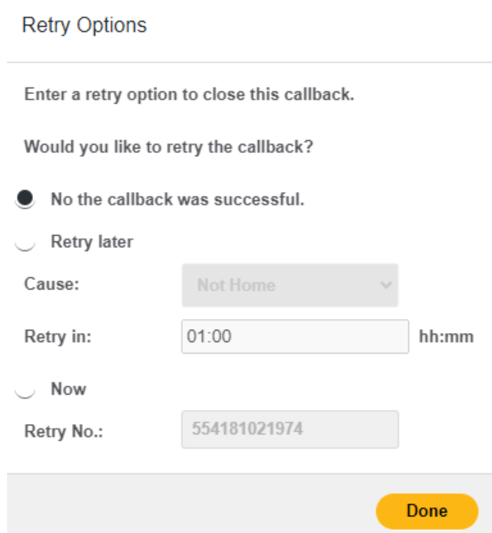
Accept

Click on **Accept**.

The callback is accepted and Agent Portal Web automatically attempts to establish a connection with the customer.

Note: If an agent does not accept the callback within a predefined time, their state is automatically changed to "Unavailable" and the callback is transferred to the next available agent.

After the connection has been terminated, Agent Portal Web automatically displays the “Retry Options” window:



- If the callback was successful and there is no need for a retry select the **No, the callback was successful** option.
- If the call failed, click on the option button **Retry later**.

  Select a **Cause** and in the field **Retry in** enter the time period after which Agent Portal Web should offer you the callback again (format: hh:mm).
- If you wis to retry right away, select the **Now** option button and add the phone number you wish to be called.

Click **Done**.

If required, the wrap up reasons are required for classification of the callback, select the **Wrap Up** tab in the "Active callback" window.

8 Handling emails with Agent Portal Web

This chapter analyzes the basic operation of the e-mail features available in Agent Portal Web.

Most of the work handling e-mails is done in the **Active Contacts** work area and more specifically in the **Active email** panel which includes the following tabs:

- Message
- Details
- History
- Wrap-up

For more information, see Section 8.2, “Receiving an email message”.

The system stores all e-mail messages, including messages that you discard. You can use the e-mail history search feature to find any message.

Outstanding email messages (that is, messages that have been deferred or consulted on), are stored in the Personal Performance area and can be retrieved when you are ready to resume handling them. For more information, see Section 8.3.2.1, “Resuming an email”.

While handling an email, **360° Conversation** allows you to have an overview of all interactions the customer had with the contact center. This includes previous phone calls, callbacks, emails and web collaboration sessions. For further information, see Chapter 11, “360° Conversation functionality”.

Note: The subject field only supports 1000 bytes after quoted-printable encoding. For extended characters (which require more bytes), like Cyrillics, it is roughly equivalent to 130 characters. The exceeding bytes are discarded.

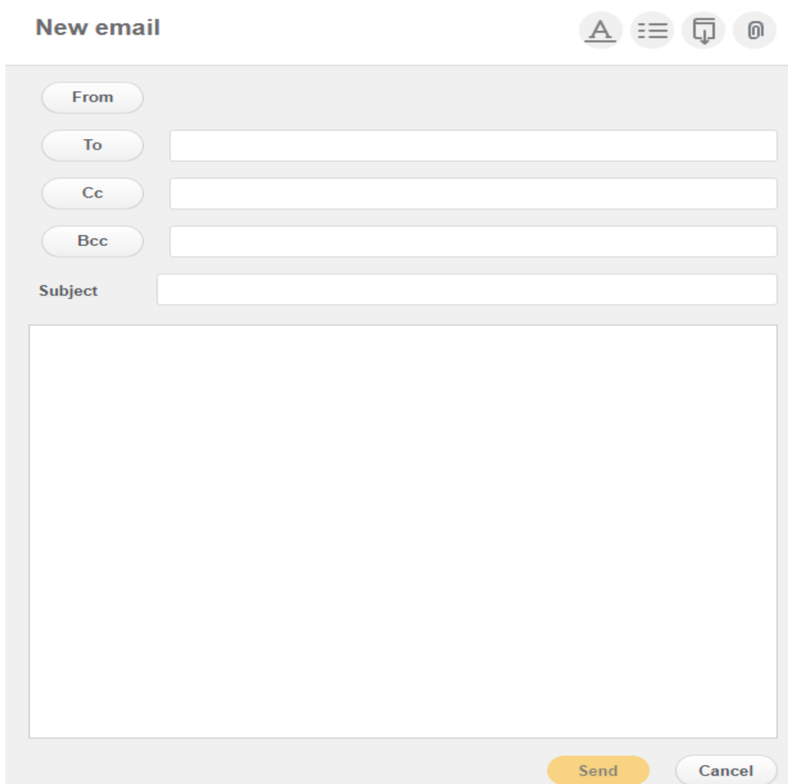
Prerequisite

To be able to work with the e-mail system of Agent Portal Web, you must be authorized for this media type in the contact center. You can then log on to the e-mail service as described in Chapter 5, “Contact center functionality”.

8.1 Composing a new email

Procedure

1. Click on  and select **Create email**.
   The “New email” panel opens:

Field	Description
To	The email address(es) of the recipient(s).
Cc	Carbon copy: The email address(es) of the person(s) who are to receive a copy of the email.
Bcc	Blind carbon copy: The email address(es) of the person(s) who are to receive a copy of the email but their address(es) will remain concealed from the other recipients.

2. Click on the **From** button.

   In the pop-up window select one of the available aliases.
   This is the email address that will be shown to the intended recipient.

3. Type in the email(s) of the recipient(s) in the “To” field.
   Alternatively you may click on the **To** button and select the recipient(s) of your choice from the pop-up window.

4. If you want to send a copy of the message to other people, type in their email(s) in the “Cc” field. Alternatively you may click on the **Cc** button and select the person(s) of your choice from the pop-up window.

5. If you want to send a copy of the message to other people but want their address to remain concealed from the other recipients, type in their email(s) in the “Bcc” field. Alternatively you may click on the **Bcc** button and select the person(s) of your choice from the pop-up window.

6. Type in a short but descriptive title for your message in the “Subject” field.

7. Write the body of your message.
   You may type in your message in plain text or use the HTML text editor by clicking on and selecting the option you wish.

   You also have the option to use a predefined template by clicking on and selecting one from the list.

   Note: When you want to use spellchek, use your browser’s embedded spellchecker. by right-clicking on the word and check the results given.

   ---

8. Click on to add attachments to your email.

   Click on the button in the Attachments area beneath the main body of the email. In the pop-up window select the file(s) you wish to attach to the email and click **Open**.

9. Click **Send** to send your message.

Note: When searching for a destination recipient in the LDAP (for "To", "Cc" and "Bcc" fields), the "Name" column will display the result for the field which type is set as "Name" and the "Email address" column for the one which type is set as "Office E-mail" (in OSCC Manager Directory Results settings).
When there is more than one field of type "Name"/"Office E-mail", the column "Name"/"Email address" will display the result for the field at the bottom of the results list (in OSCC Manager Directory Results settings), regardless of previous fields set to the same type.

8.2 Receiving an email message

When an e-mail message is assigned to you, a sound notification is played and the Agent Portal Web switches to the **Active Contacts** work area automatically. Also, the **Active email** panel appears on the screen. If the window is minimized or it is in background, a toaster is presented along with a sound notification.

The **Active email** panel functions very much like an ordinary e-mail program. For example, you can reply to or forward a message, send messages to multiple recipients or add attachments.

As you work with an email, you might want to switch to another tab area in Agent Portal Web. For example, you might want to use the **Search** functionality or adjust Agent Portal Web's settings by switching to the **Settings** area. The **Active email** panel will stay open in the **Active Contacts** area while you work on the other tabs so that you can switch back without losing your progress.

8.3 Handling incoming emails

The following options are available while on the **Active email** panel:

Button	Function	Meaning
	Reply	Answer the incoming message. See Section 8.3.1, "Replying to an email".
	Defer	Defer the incoming message. For instance email handling is postponed because information has to be obtained.
	Transfer	Transfer the email to another agent. See Section 8.3.3, "Transferring an email".
	Requeue	Transfer the e-mail to a different queue. This can be useful if a customer has sent an inquiry to a wrong queue. See Section 8.3.4, "Requeueing an email".
	Discard	Delete e-mails that are not handled. When you press the button different reasons are displayed to you. Select the applicable one, the e-mail is then discarded.
	Print	Print the email using a printer connected to the pc or network.

Note: The **Active email** panel will remain open until one of the options above is selected.

8.3.1 Replying to an email

Procedure

1. Click on .
   The **Email reply** panel is displayed.
2. The recipient field "To" is filled automatically by Agent Portal Web using the email address of the customer. However additional email addresses may be added if needed.
3. If needed, fill the Cc and Bcc fields.
   Cc and Bcc fields can be shown/hidden by clicking on .

   Note: Cc and Bcc fields are explained in Section 8.1, "Composing a new email".

4. Type in a short but descriptive title for your message in the "Subject" field.
5. Write the body of your message.
   You also have the option to use a predefined template by clicking on and selecting one from the list.
6. If you want to run your message through the Spell Checker click on .
   For further information, refer to Appendix B, "Spell Checker".
7. If needed, click on to add attachments to your email.
   Click on the button in the Attachments area beneath the main body of the email. In the pop-up window select the file(s) you wish to attach to the email and click **Open**.
8. Click **Send**.

History

When you are writing the message body you can view the last e-mail from the customer below your message. It is also possible to follow the complete conversation with the contact.

8.3.2 Deferring an email

If you prefer to handle an email message at a later time, you can defer the message. When you defer an email message, the message is assigned a status of **Deferred** and is listed in the **Emails** area. When you are ready, you can resume handling the email message.

If you do not resume handling an email message within a certain period of time, the message is requeued to you.

Note: This time is specified in the Manager application.

Procedure

In the **Active email** panel click on to defer the email.

8.3.2.1 Resuming an email

Procedure

1. Click on the **Emails** tab.
2. From the displayed list hover your cursor over the email you wish to resume handling and on the far right click on .

3. The message is resumed in the **Active Contacts** area.

8.3.3 Transferring an email

8.3.3.1 Internal transfer

An email message can be forwarded to only one agent of the contact center, and as a result no Cc or Bcc addresses can be added on it.

Any attachments that are included in the original email message are automatically added to the forwarded message.

Procedure

1. In the **Active email** panel click on ⇨ and select **Internal transfer**.

   The **Internal transfer email** panel is displayed.

2. Click on the **To** button and select the agent to whom you want to transfer the message. If the agents list is long, you can use the search functionality to limit the list.

3. Write the body of your message.
   You also have the option to use a predefined template by clicking on and selecting one from the list.

4. If needed, click on to add attachments to your email.
   Click on the **+** button in the Attachments area beneath the main body of the email. In the pop-up window select the file(s) you wish to attach to the email and click **Open**.

5. Click **Send**.

8.3.3.2 External transfer

You can forward an email message to someone who is outside the contact center. For example, a subject matter expert might be the best person to handle the message. Any attachments that are included in the original e-mail message are automatically added to the forwarded message.

When you forward an email message to someone outside the contact center, your handling of the message is considered complete. Any reply from the external person will be considered a new contact.

Procedure

1. In the **Active email** panel click on ⇨ and select **External transfer**.

   The **External transfer email** panel is displayed.

   Note: To see the Cc and/or Bcc fields, click on ☰.

   ---

2. To specify who to forward the message to, do one of the following:

   - In the To, Cc, or Bcc field, type an e-mail address.
   - To select an e-mail address from a directory, click on the To, Cc, or Bcc button, and select one.

3. Write the body of your message.
   You also have the option to use a predefined template by clicking on and selecting one from the list.

4. If needed, click on to add attachments to your email.
   Click on the + button in the Attachments area beneath the main body of the email. In the pop-up window select the file(s) you wish to attach to the email and click **Open**.

5. Click **Send**.

8.3.3.3 External consult

You can consult with someone who is outside the contact center. Any attachments that are included in the original email message are automatically added to the consulting message.

When you consult externally on an email message, the message is assigned a status of **Consulted** and can be found in the **Emails** tab. When you are ready, you can resume handling the email message.

Procedure

1. In the **Active email** panel click on ⇨ and select **External consult**.

   The **External consult email** panel is displayed

   Note: To see the Cc and/or Bcc fields, click on ☰.

   ---

2. To specify who to forward the message to, do one of the following:

   - In the To, Cc, or Bcc field, type an e-mail address.
   - To select an e-mail address from a directory, click on the To, Cc, or Bcc button, and select one.

3. Write the body of your message.
   You also have the option to use a predefined template by clicking on and selecting one from the list.
4. If needed, click on to add attachments to your email.
   Click on the button in the Attachments area beneath the main body of the email. In the pop-up window select the file(s) you wish to attach to the email and click **Open**.
5. Click **Send**.

8.3.4 Requeueing an email

You can requeue an e-mail message that you are handling.
Before you requeue the e-mail message, you can type a message in the message area, to explain why you are requeuing the e-mail message.

Procedure

1. In the **Active email** panel click on the "Requeue email into a queue" button .
2. The **Email requeue** window appears
3. Click **To**
4. A new window appears with all available queues to perform a requeue
5. Select a queue or, when the queue list is long, use the search functionality
6. Type your message in the message area.
7. Click **Send**.

8.3.5 Discarding an email

You can discard an email message (for example, when you receive an e-mail message that does not require an answer).

When you discard an email message, the message does not require any further attention. However, you can still find the message and review its details in the **Emails** area.

Procedure

1. In the **Active email** panel click on .
2. Select a discard reason.

8.3.6 Printing an email

Procedure

1. In the **Active email** panel click on .

8.3.7 Wrapping up an email

Use the **Wrap-up** tab in the Active email panel to enter wrap-up reasons and show how you completed an email message.

If the **Wrap-up reason required** setting is enabled for you in the Manager application, you must select at least one wrap-up reason.

Note: You do not have to wait until you finish handling the contact to enter Wrap-up reasons. You can select one or more Wrap-up reasons at any time. However, do not save the Wrap-up reasons until you have completed the contact, because you can perform only one Save action for Wrap-up reasons. After the Save action, you cannot enter any more Wrap-up reasons.

If you decide to defer an e-mail message or to consult on the e-mail message, the system does not save any Wrap-up reasons that were entered.

Procedure

1. In the **Active email** panel click on the **Wrap-up** tab.
2. Select the check box for each Wrap-up reason that applies to the contact. Only Wrap-up reasons that are associated with the contact's queue are displayed.

9 Handling Web Collaboration sessions with Agent Portal Web

Prerequisite

In order to be able to handle Web Collaboration sessions in Agent Portal, you must be enabled for this media type in the contact center. You can then log on to the web collaboration media type as described in Chapter 5, “Contact center functionality”.

Web Collaboration

Web Collaboration allows the customer to establish a web chat session from the enterprise website to an agent in the Contact Center. In the same way as an incoming call, the incoming request for a chat session is routed to a suitable agent for whom a corresponding chat window opens.

9.1 Receiving Web Collaboration chats

When customers initiate chat sessions on the customer website, these chat sessions are assigned to agents according to the rules configured in OSCC and they may handle them with Agent Portal.

When you are handling a Web Collaboration chat you can either type an answer or send predefined messages and URLs to the customer. You can also use emoticons and format the text by changing its color and/or weight.

Procedure

1. Logon to the web collaboration medium in Agent Portal.
2. When your status is set to available, a web collaboration session is automatically opened for you as soon as it is added to the queue.

When a web collaboration session is assigned to you, a sound notification is played. Additionally, the **Active Contacts** area is displayed along with the **Active Web Collaboration** panel. The Active Web Collaboration panel contains the customer's original question as well as any replies sent by the system. If the window is minimized or it is in background, a toaster is presented along with a sound notification.

The **Session** tab consists of two main panels:

- **Session transcript** - The transcript contains all messages exchanged during the session. The transcript is in read-only mode but you can copy-paste portions of it.

- **Message input area** - Use this area to answer a web collaboration contact. For example, you can type your answer, insert a standard message or insert a URL.

As you work with the web collaboration contact, you might want to move back and forth between other areas. When you return to the **Active Contacts** area the **Active Web Collaboration** panel will remain open for you to switch back without losing your progress.

9.2 Responding to a Web Collaboration contact

When a new web collaboration message is received, a sound notification is played. The Active Web Collaboration panel contains the customer's original question as well as any replies sent by the system. If the window is minimized or it is in background, a toaster is presented along with a sound notification.

9.2.1 Typing a message in a Web Collaboration session

When the **Active Web Collaboration** panel is shown on the screen, you are in answer mode and can begin your response to the contact.

Procedure

1. In the **Active Web Collaboration** panel, type your message in the message input area at the bottom.

   Press **Shift+ENTER** to insert a line break in the message.
   The number of characters of a message is limited and depends on the formatting of the text. The field maximum is 2000 characters, but that includes the HTML code required for formatting.

   You are now presented with the following options:

Button	Function
B	The text you type will be in bold.
I	The text you type will be in italic.
U	The text you type will be underlined.

2. Click on **Send**.

   Sending the message is the default action on the **Session** tab. As soon as the message is ready to send, you may press the **ENTER** key instead.

9.2.2 Inserting a standard message as a Web Collaboration Answer

A standard message is used to save you time when you are replying to a web collaboration contact. You can insert a generic message or a message associated with the current queue and then edit it to meet your requirements.

Procedure

1. In the message input area at the bottom of the **Active Web Collaboration** panel click on .
2. Select one of the predefined standard messages.

   The message is added to the message input area for you to edit it before sending it if you wish.
3. Press the **Enter** key.

9.2.3 Inserting an emoticon into a Web Collaboration Message

Emoticons, such as a happy face, are often used in electronic messages to convey a sense of informality, and to encourage the reader to view the writer as a friendly and helpful person.

Procedure

In the message input area at the bottom of the **Active Web Collaboration** panel click on and select the appropriate emoticon. The emoticon is now added to your message.

9.2.4 Inserting a URL into a web collaboration message

You can insert a URL; that is a link to a web page, into a web collaboration message. When the contact receives the message, the URL is shown as a clickable link.

Procedure

In the message input area at the bottom of the **Active Web Collaboration** panel click on and select a URL. The URL is now added to your message.

9.2.5 Inviting another user to take part in a Web Collaboration session

You can invite another user to join an ongoing Web Collaboration session. When a user receives an invitation to join a session, the complete transcript of the session appears on his or her screen, up to the point where the invitation was sent. The user can review the transcript and then accept or decline the invitation.

Procedure

1. At the top of the **Active Web Collaboration** panel click on .
2. In the **Invite Agent** dialog select the user you want to invite.

> **Note:** Only the Agents that are logged on for web collaboration and are currently not handling another web collaboration session will be listed.

9.2.6 Requeuing a Web Collaboration session

It is possible to requeue a web collaboration session to an agent or a queue when another user is better qualified to handle it. When the other agent receives the contact, the session becomes a conference between the customer, the other agent, and you. You can then remain in, or disconnect from the session.

Procedure

1. At the top of the **Active Web Collaboration** panel click on .
2. Select whether you would like to requeue to an agent or a queue.
3. Select the agent or queue from the list.
4. You can stay in the session until another agent has joined or you can disconnect from it.

> **Note:** If a web collaboration contact is re-queued and an agent is not immediately available for the new queue, then the contact will not run through an associated queue processing flow.

9.2.7 Asking the contact for a phone number

You can use this feature to request a phone number from the customer. A special form is displayed onto the customer's screen that contains an input box to enter a phone number and a refuse button if they do not want to have a phone call.

Procedure

1. At the top of the **Active Web Collaboration** panel click on .

   A message is sent to the contact, asking for a phone number.

2. When the contact sends a phone number the **New call** window opens on your screen. Click on **Dial** to make the call.

9.3 Disconnecting from a Web Collaboration session

When you have finished processing a web collaboration contact you can disconnect the connection to the session.

- When you are the sole user in the web collaboration session, the session ends when you disconnect the connection.
- If you are in a conference session with the web collaboration contact and another user, the session continues after you have disconnected your connection.

Procedure

At the top of the **Active Web Collaboration** panel click on **Disconnect**.

9.4 Wrapping up a Web Collaboration session

Use the **Wrap-up** tab in the **Active Web Collaboration** panel to enter Wrap-up reasons, to show how you completed a Web collaboration session.

If the **Wrap-up** reason required setting is enabled for you in the Manager application, you must select at least one Wrap-up reason.

Imporant: You do not have to wait until you finish handling the contact to enter Wrap-up reasons. You can select one or more Wrap-up reasons at any time. However, do not save the Wrap-up reasons until you have completed the contact, because you can perform only one Save action for Wrap-up reasons. After the Save action, you cannot enter any more Wrap-up reasons.

Procedure

1. In the **Active Web Collaboration** panel switch the **Wrap-up** tab.
2. Select the check box for each Wrap-up reason that applies to the contact.

   Note: Only Wrap-up reasons that are associated with the contact's queue are available.

10 Handling OpenMedia messages with Agent Portal Web

Most of the work handling OpenMedia messages is done in the **Active Contacts** work area and more specifically in the **Active OpenMedia contact** panel which includes the following tabs:

- Session
- Details
- Wrap-up
- 360° Conversation

For more information, see Section 10.2, “Handling incoming OpenMedia messages”.

Outstanding OpenMedia messages (that is, contacts that have been deferred), are stored in the **OpenMedia Deferred Messages** area and can be retrieved when you are ready to resume handling them. For more information, see Section 10.2.1.1, “Resuming an OpenMedia message”.

While handling an OpenMedia message, **360° Conversation** allows you to have an overview of all interactions the customer had with the contact center. This includes previous phone calls, callbacks, emails, web collaboration sessions, and OpenMedia interactions. For further information, see Chapter 11, “360° Conversation functionality”.

Prerequisite

To be able to work with the OpenMedia connectors of Agent Portal Web, you must be authorized by the administrator of the Contact Center. You can then log on to the connectors as described in Section 5.1, “Logging on to and off from the OpenScape Contact Center”.

10.1 Receiving OpenMedia messages

When a new OpenMedia session is assigned to you, a sound notification is played. Additionally, the **Active Contacts** area and the **Active OpenMedia** panel are displayed. The Active OpenMedia panel contains the customer’s original question as well as any replies sent by the system. If the window is minimized or it is in background, a toaster is presented along with a sound notification.

When an OpenMedia message is received, a sound notification is played and the Agent Portal Web switches to the **Active Contacts** work area automatically. Also, the **OpenMedia message** panel appears on the screen. The Active OpenMedia panel contains the customer's original question as well as any replies sent by the system. If the window is minimized or it is in background, a toaster is presented along with a sound notification.

The message of the customer is displayed on the upper part of the **OpenMedia message** panel while on the bottom part the **Message input area** is displayed, where you can type your answer.

If this is a real time message (e.g. chat message) then in order to end the session you need to click on **Disconnect**.

10.2 Handling incoming OpenMedia messages

The following options are available while handling an OpenMedia message:

Button	Function	Meaning
	Defer	Defer the incoming OpenMedia message. For instance, handling of this message is postponed because information has to be obtained.
	Transfer	Transfer the OpenMedia message to another agent. See Section 10.2.2, "Transferring an OpenMedia message".
	Requeue	Transfer the OpenMedia message to a different queue. This can be useful if a customer has sent an inquiry to a wrong queue. See Section 10.2.3, "Requeueing an OpenMedia message".
	Discard	Delete OpenMedia messages that are not handled. When you press the button different reasons are displayed to you. Select the applicable one, the OpenMedia message is then discarded.
	Print	Print the OpenMedia message using a printer connected to the pc or network.

10.2.1 Deferring an OpenMedia message

If you prefer to handle an OpenMedia message at a later time, you can defer it. When you defer an OpenMedia message, it is assigned a status of **Deferred** and is listed in the **OpenMedia Deferred Messages** area. When you are ready, you can resume handling the OpenMedia message.

If you do not resume handling an OpenMedia message within a certain period of time, it is requeued to you.

Note: This time is specified in the Manager application.

Procedure

In the **Active OpenMedia message** panel click on to defer the message.

10.2.1.1 Resuming an OpenMedia message

Procedure

1. Switch to the **OpenMedia Deferred Messages** area.
2. From the displayed list hover your cursor over the OpenMedia message you wish to resume handling and on the far right click on .
3. The message is resumed in the **Active Contacts** area.

10.2.2 Transferring an OpenMedia message

Procedure

1. In the **Active OpenMedia message** panel click on .
2. In the pop-up window, select the agent you want to transfer the message to.
3. The message is transferred.

10.2.3 Requeueing an OpenMedia message

You can requeue an OpenMedia message that you are handling. Before you requeue the message, you can type a message in the message area, to explain why you are requeuing it.

Procedure

1. In the **Active OpenMedia message** panel click on .
2. Select whether you would like to requeue to an agent or a queue.
3. Select the agent or queue from the list.

10.2.4 Discarding an OpenMedia message

You can discard an OpenMedia message (for example, when you receive a message that does not require an answer).

When you discard an OpenMedia message, the message does not require any further attention. However, you can still find the contact and review its details in the **OpenMedia Deferred Messages** area.

Procedure

1. In the **Active OpenMedia message** panel click on .
2. Select a discard reason.

10.2.5 Printing an OpenMedia message

Procedure

1. In the **Active OpenMedia message** panel click on .

10.2.6 Wrapping up an OpenMedia message

Use the **Wrap-up** tab in the **Active OpenMedia message** panel to enter wrap-up reasons and show how you completed the contact.

If the **Wrap-up reason required** setting is enabled for you in the Manager application, you must select at least one wrap-up reason.

Note: You do not have to wait until you finish handling the contact to enter Wrap-up reasons. You can select one or more Wrap-up reasons at any time. However, do not save the Wrap-up reasons until you have completed the contact, because you can perform only one Save action for Wrap-up reasons. After the Save action, you cannot enter any more Wrap-up reasons.

If you decide to defer an OpenMedia message or to consult on the OpenMedia message, the system does not save any Wrap-up reasons that were entered.

Procedure

1. In the **Active OpenMedia message** panel click on the **Wrap-up** tab.
2. Select the check box for each Wrap-up reason that applies to the contact. Only Wrap-up reasons that are associated with the contact's queue are displayed.

11 360° Conversation functionality

Prerequisite

To use **360° Conversation**, the feature must be enabled in OpenScape Contact Center by the administrator.

Description

360° Conversation provides the agent of OpenScape Contact Center with a list of all interactions a certain customer had in the past with the contact center through any of the available media channels (voice, callback, e-mail and/or web collaboration).

Moreover **360° Conversation** assists the agent by providing numerous details regarding the customer such as their phone number, email, home/office address, birthday and others. The aforementioned details are also editable so that the agent can update them while handling the contact.

The **360° Conversation** tab consists of two areas:

- Customer information

  Displays the main information of the customer, such as his name, address and contact details (phone number, email address, etc.)

- History

  Lists all interactions the customer had with the contact center.

Note: If the Web Chat applicant has provided incomplete data, then the 360º functionality will be disabled for the current session.

11.1 How to use 360° Conversation

How to see customer details

1. Click on the **Edit** button located at the upper right corner of the customer information area.
2. Click on **Show customer**.

   The customer details are displayed.
   You may click on the back arrow to go to the previous screen.

How to edit customer data

1. Click on the **Edit** button located at the upper right corner of the customer information area.
2. Click on **Edit customer**.

   The Edit customer screen is displayed with a list of fields that can be edited.
3. Edit the fields of your choice and click **Save**.

   The customer data are updated and the previous screen is displayed.

How to search for a customer

1. Click on the **Edit** button located at the upper right corner of the customer information area.
2. Click on **Search customer**.

   The Search customer screen is displayed.

Fill in the field(s) you wish and click **Search**.

Note: Use the **All fields** option to not limit your search results to a single area.

---

3. The search results are displayed and the following options are available:
   - Select one of the results and the originator ID (phone number, email address, etc.) gets associated with the selected customer.
   - Create a new customer.

   You may click on the back arrow to go to the previous screen.

How to create a new customer

1. Click on the **Edit** button located at the upper right corner of the customer information area.
2. Click on **Create customer**.
3. Fill in the fields you wish.

Note: The fields **First name** and **Last name** are mandatory.

---

4. Click **Save**.

How to add/edit a note on a history item

1. In the **History** area click on the field **Add a note here**.

   If a note is already added, click on the text.

Note: You can only add/edit a note for the last history item, meaning the contact you are currently handling.

---

2. Type in the note you wish.
3. Click **Save**.

How to view the details of a history item

1. Click on the history item you wish.
2. The details of the history item are displayed.

3. Click on the back arrow to go back to the previous screen.

12 Using the Speed and Team Bars

The **Speed Bar** and the **Team Bar** are quick-access tools that enable you to quickly contact people from your **Speed List** and other Agents from the **Team List**. For details refer to:

- Section 12.1, “Speed Bar”
- Section 12.2, “Team Bar”

12.1 Speed Bar

If there are people in the **Speed List** whom you contact often, you can add their names to the **Speed Bar,** so that you can contact them from any screen of Agent Portal Web, without having to open the Speed List.

You can consult the Calendar events of other people, by choosing the name of the person from the **Speed Bar.**

The **Speed Bar** is located in the header of Agent Portal Web and can hold a maximum of 25 entries. Each of the entries may have multiple phone numbers.

You can undock the **Speed Bar** by clicking on the arrow next to your username and selecting the **Undock Speed Bar** option. You may then move the undocked **Speed Bar** around your screen to the position of your choice.

If you wish to reset the **Speed Bar** to its default position, you can either close the window of the undocked Speed Bar or click on the arrow next to your username and deselect the **Undock Speed Bar** option.

To configure the **Speed Bar,** refer to Section 4.13.3, “Agent”.

12.1.1 Adding an entry to the Speed Bar

1. Open the **Speed List** work area.
2. Hover the cursor over the contact you want to add to the Speed Bar.
3. Click on +.
4. The contact is now added to the Speed Bar.

12.1.2 Deleting an entry from the Speed Bar

There are two ways to delete an entry from the Speed Bar:

Option 1

1. On the Speed Bar, right click on the name of the contact you want to remove.
2. Click on **Remove**.
3. The contact is now removed from the Speed Bar.

Option 2

1. Open the **Speed List** work area.
2. Hover the cursor over the contact you want to remove from the Speed Bar.
3. Click on .
4. The contact is now removed from the Speed Bar.

12.1.3 Calling a person on the Speed Bar

1. Click on the name of the person you want to call.
2. The call is initiated immediately.

Note: If a contact has several phone numbers, a screen pop menu is displayed with the available phone numbers. Select the phone number you want to call.

12.1.4 Exchange Calendar integration on Speed Bar

1. Click on the name of the person for which you want to consult calendar events, and then Click on **Calendar** option.
2. A new Window is opened with the Calendar of the corresponding user on a per Week screen. In this calendar window, it is possible to select between **Week** mode and **Events** mode. By default the current week is presented but it is also possible to select the week to be viewed.

Note: If more than one email address is available in the Speed bar entry, a modal is presented to the agent, so that he/she can choose the desired email to be used in the Calendar.

If the agent clicks on an email address, the email tool which is configured in the OS will be opened with the email already selected as the destination.

12.2 Team Bar

If there are people in the **Team List** whom you contact often, you can add their names to the **Team Bar**, so that you can contact them from any screen of Agent Portal Web, without having to open the Speed List.

The **Team Bar** is located in the header of Agent Portal Web and can hold a maximum of 25 entries.

You can undock the **Team Bar** by clicking on the arrow next to your username and selecting the **Undock Team Bar** option. You may then move the undocked **Team Bar** around your screen to the position of your choice.

If you wish to reset the **Team Bar** to its default position, you can either close the window of the undocked Speed Bar or click on the arrow next to your username and deselect the **Undock Team Bar** option.

To configure the **Team Bar**, refer to Section 4.13.3, “Agent”.

12.2.1 Adding an entry to the Team Bar

1. Open the **Team List** work area.
2. Hover the cursor over the agent you want to add to the Team Bar.

3. Click on + .
4. The agent is now added to the Team Bar.

12.2.2 Deleting an entry from the Team Bar

There are two ways to delete an entry from the Team Bar:

Option 1

1. On the Team Bar, right click on the name of the agent you want to remove.
2. Click on **Remove**.
3. The agent is now removed from the Team Bar.

Option 2

1. Open the **Team List** work area.
2. Hover the cursor over the agent you want to remove from the Team Bar.
3. Click on – .
4. The contact is now removed from the Team Bar.

12.2.3 Calling an agent using the Team Bar

1. Click on the name of the agent you want to call.
2. The call is initiated immediately.

12.2.4 Chatting with an agent using the Team Bar

1. Right click on the name of the agent you want to chat with.
2. Click on **Start Chat**.
3. A new chat session is initiated immediately.

13 CLIP for Outgoing Calls

The Calling Line Identification Presentation (CLIP) for Agent Portal Web can be used only for outgoing calls. You can choose outgoing numbers via a drop-down menu of available numbers.

CLIP does not affect the current functionality of Callback regarding the definition of the Caller number.

A list of calling numbers must be configured per tenant.

The CLIP is valid for all outgoing calls: from Make Call button, from Speed List, Directory Search and Activity Log.

To use the CLIP functionality, see Section 4.13.3, “Agent”

Note: Selection of CLIP is not available for Team List as it is not required for internal calls.

Note: Selecting the Calling Number/Name is only valid for the OpenScape Voice, because it depends on a private CSTA parameter which is not supported by OpenScape 4000 and OpenScape Business.

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14 Chatting with other Agents and Supervisors

This chapter analyzes the basic operation of the chatting feature available in Agent Portal Web.

Chatting is done outside the main window of Agent Portal Web, in separate pop-up windows in order not to affect your other tasks. As a result you may chat with other agents/ supervisors even when handling calls, e-mails or web collaboration sessions.

You can participate in multiple chat sessions with different agents/ supervisors at the same time. However, the maximum number of participants per chat window is limited to two.

You may also message an agent/supervisor even if they are **offline**. OpenScape Contact Center will send your message(s) when they log back in to Agent Portal Web.

Note: After logging off from Agent Portal Web, all exchanged messages are erased.

Prerequisite

To be able to work with the Chat system of Agent Portal Web, you must be authorized by the Admin of the Contact Center.

14.1 Starting a new Chat session

Chat sessions can be initiated with the following way:

- Through the Team List:

  See Section 4.6.6, “Chatting with an agent from the Team List” for details

- Through the Team Bar:

  See Section 12.2.4, “Chatting with an agent using the Team Bar”

14.2 Handling incoming Chat sessions

When another agent starts a chat session with you, a pop-up notification is displayed in the lower right corner of the screen.

Simply click on the name of the of the other party to open the chat window.

15 WebRTC Integrated Phone with Voice

Introduction

This feature allows you to embed a WebRTC client in the OSCC Agent Portal Web. With the WebRTC client you are able to establish voice calls. Specifically:

- Receive a voice contact in the Agent Portal Web without needing a physical phone or a soft client
- Configure which devices will be used for audio
- Start a voice contact via the Integrated Phone in the Agent Portal Web
- Dial DTMF during a call to interact with an answering machine

Features

The WebRTC client can use the following features:

- **Hold/Retrieve** - You can place the call on hold and retrieve the call.
- **Consultation Call** - You can start a consultation, by placing the current call in consultation hold and consult a third party.
- **Transfer** - You can transfer the original party to the consulted party.
- **Blind Transfer** - You can transfer the original party to the third party without starting a consultation.
- **Deflect** - You can deflect an alerting call to a third party.
- **Join Conference** - You can join a conference bridge by dialing the conference access code and then dialing the Conference PIN.

When there is a Desk Phone (physical phone or soft phone) registered to the same SIP subscriber as the Integrated Phone, the following topics are observed. As a consequence, such setup is not recommended.

- The agent can’t use both the deskphone and the Integrated Phone simultaneously. When the Agent Portal Web is set to use the Integrated Phone, it will not be possible to control any calls which are being handled by the Desk Phone.
- When the Agent Portal Web is set to use the Desk Phone, the Integrated Phone is unregistered on the OSV.
- In case of multiple registered devices, the agent will not be able to select the CLIP for outgoing calls.

16 WebRTC Video and Screen Sharing

Introduction

This feature allows you to interact with customers using Video and Screen Sharing. Contacts will be started independently from any other contacts from other media. However, this feature depends on WebRTC Integrated Phone and works as a complement to it. You must select a contact from your company’s Web Page built with the **Click to Contact** component.

Specifically this feature:

- Configures which devices will be used for video and screen sharing
- Allows the Agent Portal Web to display screen sharing or video from customer
- Allows the Agent Portal Web to start sharing its screen or video during a call

Requirements

You must have a camera properly configured and the supported browsers must have permission to access it.

Features

The following features are available:

- **Screen Share** - You can start sharing your screen. Depending on which browser you are running Agent Portal Web on, you can choose the entire screen, an application or a tab to share with the customer.
- **Enable Camera** - You can start a video during a call.
- **Change Video Settings** - You can select which camera can be used before enabling video. To do that, click **Audio and video settings** or go to the **Audio and Video** tab located in the **Settings** menu.

- **Camera Preview** - You can test your camera with the camera preview. Navigate to **Settings** > **Audio and Video**. You will see a preview from the device chosen in the Camera list.

Note: Do not configure the integrated phone extension, configured to use video/screen sharing, as an Agent integrated phone extension to be recorded (recorded extension).

Note: Do not configure the integrated phone extension, configured to use video/screen sharing, with the feature Silent Monitoring Agent in OpenScape Voice.

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17 Agent Portal Web as a Desktop Application

17.1 Introduction

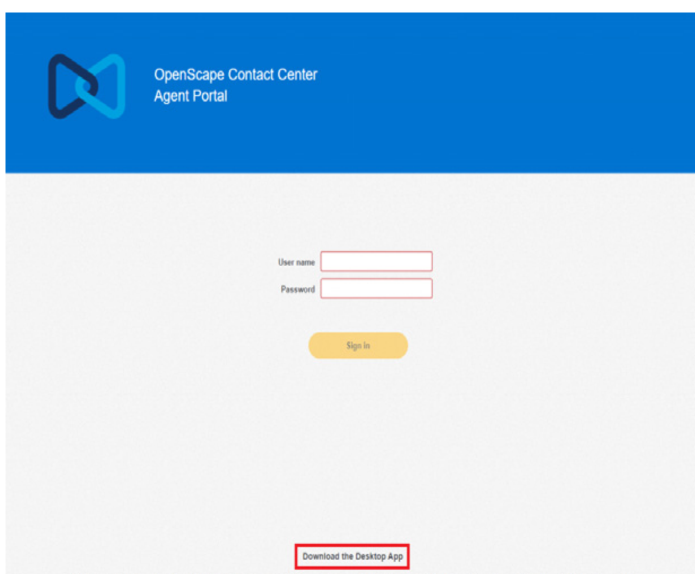
Agent Portal Web is a pure HTML5 client application, which runs only within modern web browsers, such as Chrome, Firefox and MS Edge Chromium. However, there are some limitations when trying to access local resources on the Agent's PC. A potential solving is to use a multiplatform application solution, like Electron JS, to embed the Agent Portal Web application.

Electron is a framework for creating native applications using web technologies like JavaScript, HTML, and CSS. Agent Portal Web runs as a desktop application, in an Electron JS environment.

Electron JS embeds a web site, but runs as a desktop application. Therefore, it is possible to support functions which are blocked by the browsers, such as:

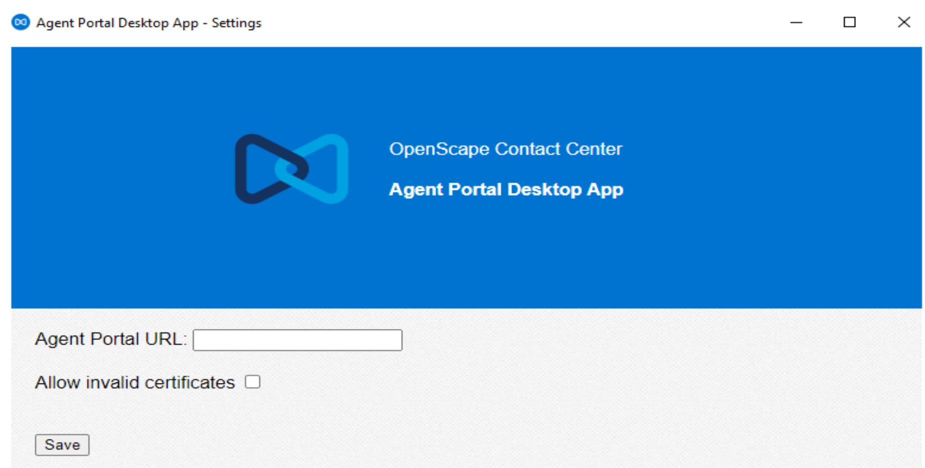
- Open a desktop application from Supplemental Information.
- Taskbar is always displayed on top of the screen.

The login page of the Agent Portal Web Desktop Application offers a button to download the setup file, which is used to install the application. Once the installation process is completed, the desktop application can be directly started, via the application icon.



Note: The button to download the setup file of the Agent Portal Web Desktop Application will only be displayed if the Agent Portal Desktop Application is enabled in the Application Server.

When the Agent Portal Web Desktop Application opens for the first time, the agent must enter the server address. E.g. hostname.example.com.



When the agent opens the application, the version of the `electron-app-version.json` file (deployed along with the setup, inside the agent portal war) will be checked. If the version of the file located in the agent's machine is lower than the one on the server, the user will be prompted to update the application.

If the user chooses to update, a new setup file will be downloaded and the installation process will automatically start. In addition, the current running instance of the application will be closed.

Note: This version is not related to the OSCC version. It should change only when a modification occurs in the Electron side of the application.

17.2 Features

The following features are available:

- **Supplemental Information**: It is possible to open desktop applications (executable applications) via the Supplemental Information feature. It is also possible to pass parameters to these applications.
- **Always on top**: It is possible to configure the Agent Portal Desktop Application to be always on top of the screen.
- **Taskbar**: By clicking a button (Toggle TaskBar button), it is possible to collapse/expand the Left side menu as well as the Details of the Agent Portal Web (keeping only the Task bar, Broadcaster bar, Speed bar and the Telephony bar)..

The following features demand a special behavior when the Agent Portal Web Desktop Application is reduced to the Taskbar view:

- **Add Callback**: when Add Callback is pressed, the full view is restored, in order to present the Add Callback form to the agent.
- When the agent clicks on the **Routing status change** button, the taskbar is toggled to full view. Once the Routing Status is changed, the full view is toggled back to taskbar mode.
- When the agent clicks to logon to an **OpenMedia connector** the taskbar is toggled to full view (since the list of connectors may not fit in the taskbar).
- When the agent clicks on **Extension** to change it, the taskbar toggles to full view. Once the Extension is changed, the full view is toggled back to taskbar mode.
- When the agent is required to enter a mandatory **Wrap-up Reason**, the taskbar is toggled to full view.
- When the agent logs out or is forced to log out, the full view is toggled back to taskbar mode. This happens in the following scenarios:
  - Before displaying “Exit confirmation dialog”.
  - When receiving a websocket disconnected event.
  - When initializing login page (useful when the user has just logged out in taskbar mode).

- When the agent clicks to select a **Preferred Device**, the taskbar is toggled to full view (since the list of devices may not fit in the taskbar).
- When a new **Callback** is received, the taskbar is toggled to full view.
- When a new **Chat contact** is received or when a new chat is received in an ongoing contact, the taskbar is toggled to full view.
- When a new **OpenMedia contact** is received or when a new post is received in an ongoing session, the taskbar is toggled to full view.
- When a new **Email contact** is received, the taskbar is toggled to full view.
- When the agent clicks on **Make a new call**, the taskbar is toggled to full view.
- When the agent **transfers a call**, the taskbar is toggled to full view. After the transfer is executed (successful or not), the full view is toggled back to taskbar mode.
- When the application is displayed in taskbar mode, the alert messages must be presented in the taskbar.
- When the agent starts editing the **Team bar settings**, the taskbar must be toggled to full view.
- When the agent starts sharing his/her screen, the taskbar is toggled to full view.
- When the agent receives video/screen sharing and expands the video/screen sharing screen from the preview mode, the taskbar is toggled to full view.
- The **Speed bar** must have a scroll bar.

18 UC Headset support for Call Control

This feature allows Agent Portal Web and Agent Portal Desktop App users to control the calls by using the buttons on a headset device when using an Integrated Phone.

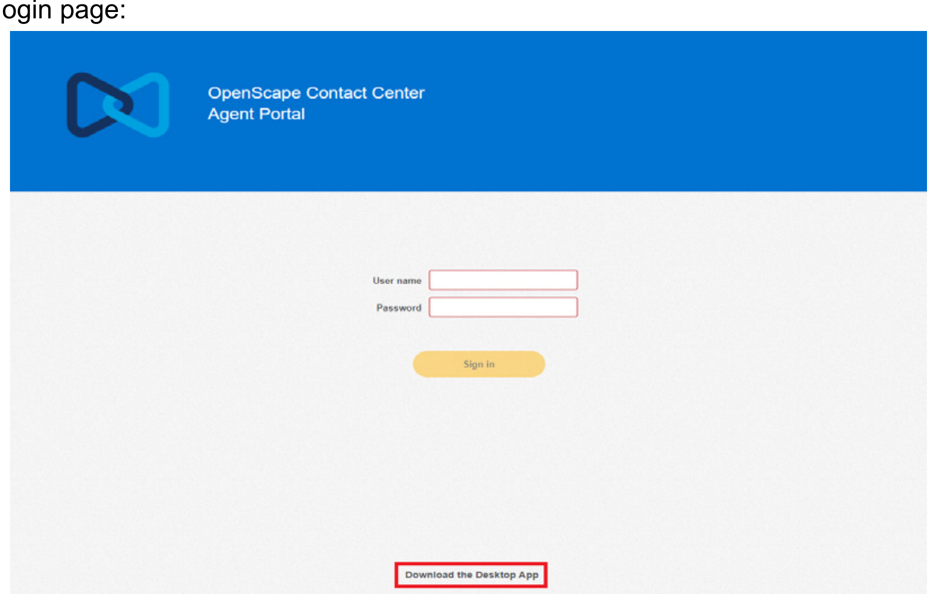
Note: The **OpenScape Headset Service** needs to be installed before first usage on the user machine.

Important: This feature is only supported on MS Windows OS.

18.1 Installing the OpenScape Headset Service

The **OpenScape Headset Service** application must be previously installed on the machine that will run the Agent Portal Web for the headset integration to work.

The OpenScape Headset Service is offered to download in the agent login page:



18.2 Supported devices

The following headset devices are supported:

- Epos/Senheiser: requires EPOS Connect software installed. Please visit the vendor website to download it.
- Poly/Plantronics: requires Plantronics Hub installed. Please visit the vendor website to download it.
- Jabra: no additional software required.
- Yealink: no additional software required.

18.3 Activating the Headset Device

Since the headset integration only works with an Integrated Phone, the OpenScape Headset Service will connect and disconnect from Agent Portal Web according to the cases below:

- The Agent Portal Web will always connect to the **OpenScape Headset Service** when the Integrated Phone is registered.
- The Agent Portal Web won't be able to connect if the **OpenScape Headset Service** is not started and running.
- The Agent Portal Web will always disconnect from the **OpenScape Headset Service** when the Integrated Phone is unregistered.

18.4 Selecting the Headset Device

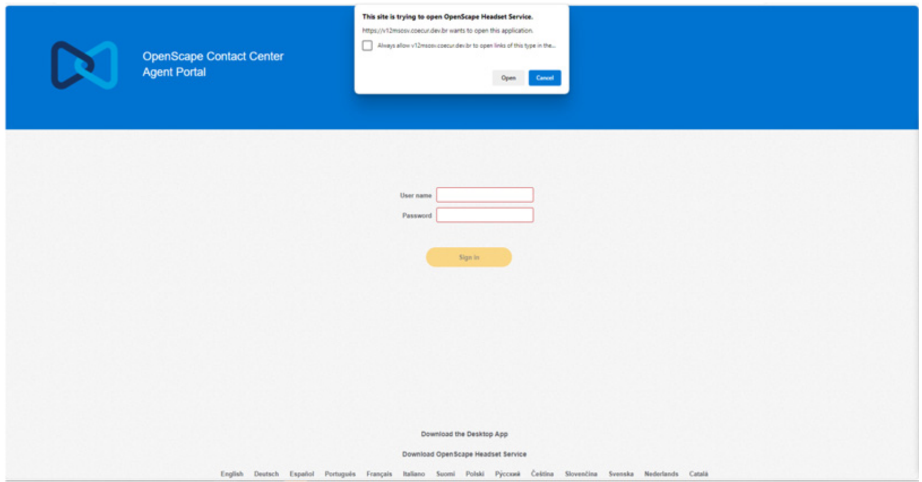
The device is selected via MS Windows Audio and Video Menu Settings.

The Call Control device must be selected as microphone (if supported).

18.5 Using the headset

In the Agent Portal Web login screen the browser will display a popup window asking if the user wants to open the **OpenScape Headset Service**.

To start using the feature confirm the popup.



Note: User can check the checkbox in the window to the **OpenScape Headset Service** start automatically the next time and the popup window not appear anymore (unless the browser cache is cleared).

Note: The popup window will only be displayed if the **OpenScape Headset Service** is installed on the machine where the Agent Portal Web is running.

Important: In case the user chooses not to open the OpenScape Headset Service, a headset device cannot be activated for call control until the Agent Portal Web is restarted and the OpenScape Headset Service is opened.

18.6 Supported controls

The following actions are available with this feature:

- mute/unmute call
- accept call
- disconnect call
- hold/retrieve call

The headset may visually signalize the call state according to its model.

A Shortcuts

Key	Function
CTRL + F1	Change Routing state to available
CTRL + F2	Change Routing state to unavailable
CTRL + F3	Change Routing state to work
CTRL + SHIFT + F4	Make New Call
CTRL + F12	Disconnect
CTRL + F6	Hold
CTRL + F7	Retrieve from Hold
CTRL + F8	Transfer
CTRL + SHIFT + F4	Consult
CTRL + F11	Conference
Ctrl + Alt + **M**	*M*ute/Unmute
Ctrl + Alt + **K**	Toggle/Untoggle *K*eypad
Ctrl + Alt + **V**	Start/Stop *V*ideo
Ctrl + Alt + **S**	Start/Stop *S*creenshare
Ctrl + Alt + **D**	Undock/*D*ock

Table 16 Key Shortcuts

NOTE: The following limitations apply:

- Selection of unavailable and work reasons cannot be done through arrow keys support.
- Hotkeys only work when the main window of Agent Portal Web is selected (not the taskbar)

General Functions	Access key	Chrome shortcut	Firefox shortcut
Log on Voice	V	Alt + V	Alt + Shift + V
Log on Callback	C	Alt + C	Alt + Shift + C
Change Extension	X	Alt + X	Alt + Shift + X
Options dropdown (req. assist., Exit)	O	Alt + O	Alt + Shift + O
Preferred device	P	Alt + P	Alt + Shift + P
Make call	M	Alt + M	Alt + Shift + M
Create menu (callback, other media…)	N	Alt + N	Alt + Shift + N
Routing status (presence)	R	Alt + R	Alt + Shift + R

Table 17 Default Shortcuts General Functions

Telephony Bar	Access key	Chrome shortcut	Firefox shortcut
Accept Call	A	Alt + A	Alt + Shift + A
Hang Up	Z	Alt + Z	Alt + Shift + Z
Hold/Resume	H	Alt + H	Alt + Shift + H
Transfer	T	Alt + T	Alt + Shift + T
Conference	Y	Alt + Y	Alt + Shift + Y

Table 18 Default Shortcuts Telephony bar

Left side tabs (in order of appearance)	Access key	Chrome shortcut	Firefox shortcut
Active contacts	1	Alt + 1	Alt + Shift + 1
Private contacts (speed list)	2	Alt + 2	Alt + Shift + 2
Agents (team list)	3	Alt + 3	Alt + Shift + 3
Queues	4	Alt + 4	Alt + Shift + 4
Activity Log	5	Alt + 5	Alt + Shift + 5
Directory Search	6	Alt + 6	Alt + Shift + 6
Personal Performance	7	Alt + 7	Alt + Shift + 7
Settings	8	Alt + 8	Alt + Shift + 8

Table 19 Default Shortcuts Left Side Tabs