



Avaya Aura™ Offsite Agent  
**User Guide**

**NN44400-120**

Document status: Standard  
Document issue: 02.02  
Document date: 26 November 2010  
Product release: Release 6.0  
Job function: User  
Type: Technical Document  
Language type: English

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# New in this release

The following sections detail what is new in the *Avaya Aura™ Agent Desktop User Guide* (NN44400-114).

- [Features \(page 5\)](#)
- [Other changes \(page 6\)](#)

## Features

See the following sections for information about feature changes:

- [Offsite Agent log on dialog changes \(page 5\)](#)
- [Improved user interface \(page 5\)](#)
- [New configuration options for Permanent Connection mode \(page 5\)](#)

### Offsite Agent log on dialog changes

Offsite Agent now allows you to enter all required information on a single log on dialog. The option to add a supervisor number is also available on this dialog.

### Improved user interface

The main Avaya Aura™ Agent Desktop user interface is based on a work item paradigm. Each agent-to-customer interaction is a work item. Work items appear on the Agent Desktop work list. If you perform another interaction associated with that work item (for example an IM consultation with an expert), then that interaction is displayed as part of the original work item.

The work list window contains work items and buttons corresponding to the work item. The buttons and functions change depending on the items in the work list window. When a new contact arrives, Agent Desktop adds the new contact to the work list.

- A work item is a unit of work that is a collection of interactions with other parties. The party can be a customer, another agent, a supervisor or an expert.
- A work list is a collection of work items.

### New configuration options for Permanent Connection mode

Offsite Agent now allows contact center administrators to choose between two configurations for agents using Permanent Connection mode: Force Answer and Accept Call.

Depending on the configuration applied by the Administrator, agents working in Permanent Connection mode either:

- hear a tone to alert them to the incoming call, which they must take (mimicing a forced call answer presentation class), or

## New in this release

- receive a pop-up dialog allowing them to accept the new call

This configuration applies across the contact center—it is not specific to individual agents.

## Other changes

See the following sections for information about changes that are not feature-related:

- [Windows 7 support \(page 6\)](#)

## Windows 7 support

Agent Desktop is now supported on the Microsoft Windows 7 operating system.

# Overview of the Offsite Agent desktop application

This chapter provides an overview of the use of the Avaya Aura™ Agent Desktop (AAAD) for Avaya Aura™ Offsite Agent (AAOA). Avaya has updated Agent Desktop to provide the functionality required by offsite agents. This update and the operating modes of Offsite Agent necessitate some different practises in the use of Agent Desktop. In addition, because new offsite agents may not be previously familiar with Agent Desktop, this chapter provides a basic overview of the interface.

**Attention:** The procedures in this book apply only to voice contacts received by offsite agents. Multimedia contact types appear to an offsite agent in exactly the same way as they would to an onsite agent. For example, the Offsite Agent connection mode has no impact on multimedia contacts.

## Navigation

- [Offsite Agent Agent Desktop concepts \(page 8\)](#)
- [The Agent Desktop client application \(page 10\)](#)

## Prerequisites

- You are familiar with basic contact center agent concepts.
- You have a working knowledge of the common Windows desktop operating systems.
- You understand how to access your corporate network over a broadband connection.

## Offsite Agent Agent Desktop concepts

### Offsite Agent Connection Modes

Offsite Agent supports two connection modes for agents, Permanent Connection and On Demand. The mode you use is decided and configured by the contact center administrator.

In Permanent Connection mode when you log on to the contact center, the Offsite Agent server makes a single call to your telephone number. This call remains up for the duration of your shift—you should not physically hang up the telephone (if you do accidentally hang up, Offsite Agent re-establishes the call). Offsite Agent bridges each contact center customer call through to your line.

Depending on the configuration applied by the Administrator, you either:

- hear a tone to alert you to the incoming call, which you must take (mimicing a forced call answer presentation class), or
- use the Accept button on the Agent Desktop to accept the new call

In On Demand mode the Offsite Agent server registers your login, but does not set up a call to your remote telephone. For each contact center customer call, Offsite Agent initiates a new call from the contact center PABX to your telephone. You need to physically answer the telephone to take the call.

### Accessing the Agent Desktop application

When you are using Offsite Agent to connect to the contact center, you must use Agent Desktop on your offsite desktop PC or laptop. Agent Desktop allows you to log onto Offsite Agent, specify your offsite telephone number, and exercise call control over your telephone to use normal contact center agent functions. To simplify the deployment of the Agent Desktop application, the Agent Desktop server employs smart client technology to provide the desktop functionality without requiring a software install. You simply use a URL in your browser to invoke the Agent Desktop interface on your PC.

### Identifying yourself as an offsite agent

Because Agent Desktop is a generic application that both onsite and offsite agents can use, you need to explicitly identify yourself as an offsite agent the first time you use the application. Agent Desktop stores this setting so that you do not have to repeat this operation.

However, if you are a mobile worker and switch at times between working onsite and offsite, then you will need to change your offsite status each time you change location.



### Entering your access credentials

For a successful connection to the contact center, the Offsite Agent server must have your agent details. When working offsite with Agent Desktop, you have an additional prompt at start up to collect these details. Depending on the settings of your particular Offsite Agent server, these will include some or all of the following:

- Offsite Agent agent id
- Corporate domain user name and password
- Your local telephone number

These details are normally available from your Offsite Agent administrator. For ease of use, Agent Desktop stores your previous entries (other than the password).

### Logging on to the contact center

Once you have connected to the contact center, you log on using the controls on Agent Desktop. If you are operating in Permanent Connection mode, the Offsite Agent server initiates a call to your PSTN telephone. When you answer this call you are connected to the contact center, but you must still log on and make yourself Ready before you can take customer calls.

If you are operating in On Demand mode, you are immediately connected to the contact center, and you must log on and make yourself Ready before you can take customer calls.

### Using a PSTN telephone with Agent Desktop

Using a PSTN telephone with Agent Desktop introduces some new practises that you must be aware of.

In Permanent Connection mode the Offsite Agent server makes a single call to the your telephone number once you enter your access credentials through Agent Desktop. Offsite Agent maintains this call for the duration of your shift, and bridges each customer call that the contact center queues to you onto your telephone line.

To prevent synchronization issues if you accidentally hang up your physical telephone, Offsite Agent implements an automatic recovery. Offsite Agent re-establishes the call and you can resume your work by answering the telephone. If you were on a customer call when this occurs, Offsite Agent returns you to the same customer call (if the customer has remained on the call). Offsite Agent allows you to hang up as many as four times in a fifteen-second period. If you hang up for a fifth time within this period, Offsite Agent will disconnect the call—in this case you must manually log off and exit Agent Desktop.

In On Demand mode the Offsite Agent server does not maintain a constant connection to your telephone: when Offsite Agent forwards a customer call to you, your telephone rings and you must physically answer the call on your telephone set.

## Overview of the Offsite Agent desktop application

You can access all available agent functions through the Agent Desktop toolbar.

When working in On Demand mode, you remain logged in to the contact center even when you hang up the offsite telephone. When working in this mode you must remember to set Not Ready if you take a non-contact center call on your telephone—otherwise Agent Desktop might attempt to connect a call to your telephone while it is busy. In such cases the Agent Desktop toolbar will indicate that a call is being presented. If the administrator has implemented the call presentation class recommended by Avaya for Offsite Agent, then the call will return to the queue when it is not answered.

## The Agent Desktop client application

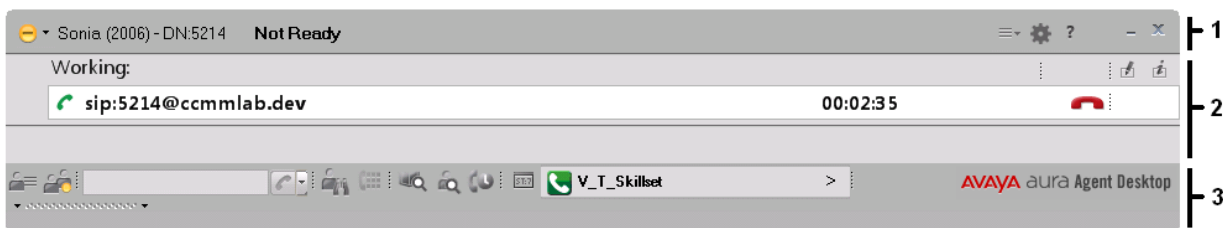
This section introduces you to the layout and controls of the Agent Desktop client application. These are the same controls that are available to an onsite agent, but some are not supported on Avaya Aura™ Offsite Agent Release 6.0, and others have modified behavior when used by an offsite agent.

### Work item paradigm

The main Agent Desktop user interface is based on a work item paradigm. Each agent-to-customer interaction is a work item. Work items appear on the Agent Desktop work list. If you perform another interaction associated with that work item (for example, an IM consultation with an expert), then that interaction is displayed as part of the original work item.

The work list consists of work items and control buttons corresponding to the work item. The controls and functions change depending on the work list window behavior. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

### Example of the Agent Desktop layout



- |   |  |
|---|--|
| 1 | <a href="#">Top bar (page 11)</a>          |
| 2 | <a href="#">Work list window (page 11)</a> |
| 3 | <a href="#">Action bar (page 13)</a>       |

## Top bar

The Top bar appears at the top of the Agent Desktop window. The Top bar provides the system status and main controls to operate Agent Desktop.





### Example of Top bar layout



The agent status icon appears on the top left corner of the Agent Desktop Top bar. It shows the agent status, agent name, agent login ID, and agent dialable number.

The Top bar has the following icons:

### Top bar icons

Icon	Name	Description
	Terminal action	Access Emergency, Observe and Intrinsic controls
	User preferences	Access user preferences
	Agent status	Select agent status
	Help	Access help information

Use the Terminal Action menu to perform the following tasks:

### Terminal Action Menu

Command	Description
Observe	Used by supervisors or agent-supervisors to listen in on a contact—not supported on Offsite Agent
Emergency	Immediately connect with your supervisor in case of emergency.

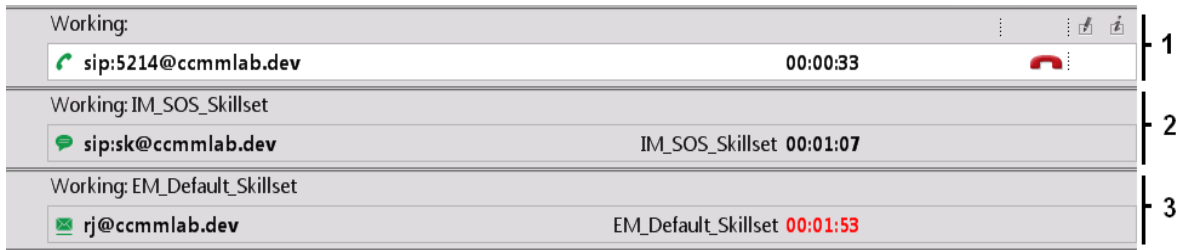
## Work list window

The work list window contains work items and control buttons corresponding to the work item. The controls and functions change depending on the information in the work list window. The top right corner of the work list window has work item controls. These controls are common to all work items on the work list. When a new contact arrives, Agent Desktop adds the new contact as a work item to the work list.

The following figure shows the work list windows and controls.

## Overview of the Offsite Agent desktop application

### Example of a work list layout



The illustrated work list shows three work items:

- 1 A voice call work item, at the top of the work list.
- 2 An Instant Message (IM) work item, in the middle of the work list.
- 3 An e-mail work item, at the bottom of the work list. The e-mail is on hold.

- A work item is a collection of interactions with a customer, another agent, a supervisor, or an expert.
- A work list is a collection of work items. When you receive a new contact, it is added to the work list so that you can monitor your current contacts. When you finish with the contact, or reject the contact, the work item is removed from the list.

### Work item controls

Each work item has a number of contact-related controls. These controls change depending on the work list window behavior and contact type.

### Examples of work item controls

Voice	IM	E-mail	Name	Description
			Accept	Accept the work item. Offsite agents use this control only in Permanent Connection mode with Accept Call configuration.
			Release	Release or reject the work item.
			Hold	Place the work item on hold.
			Transfer	Transfer the work item contact.
			Conference	Conference the work item.
			Activity code	Set the work item activity code—Activity codes are not supported on Offsite Agent.
			Work item details	Read work items details.

Only appropriate controls are displayed on work items. Voice-related controls are displayed only on a voice work item. IM related controls are displayed only on an IM work item.

### Action bar

The Action bar contains global controls to create a new work item, to search contacts, and to open secondary windows. The Action bar stays at the bottom of the Agent Desktop window and remains at the bottom as the window expands.

#### Example of an Action bar layout



Use the Action bar at the bottom of the main interface to make new contacts. New voice, IM, or e-mail contacts are collectively called new work in the Work Item Paradigm.

#### Action bar commands

Icon	Name	Description
	Customer Details	View customer details.
	Contact Presence	Contact presence.
	Initiate Contact	Start a new work item. When you originate a voice call as an offsite agent, you use the same dialling as you would if you were onsite. In Permanent Connection mode this function operates in the normal manner. In On Demand mode you leave the telephone on-hook when you use Originate, your telephone rings, and Offsite Agent makes the outbound call when you answer.
	Call Supervisor	Call your supervisor.
	DTMF	Generate DTMF tones.
	Contact Search	Search for contacts.
	Customer Search	Search for customers.
	Schedule Callback	Schedule callback.
	Agent Statistics	Display agent statistics scroll bar.

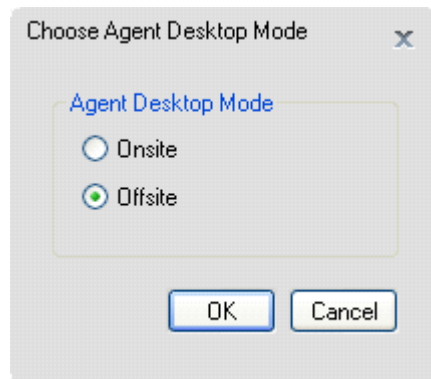
### User preferences

Use the User Settings page, under the User Preferences menu, to select template locations, enable the spelling checker, define an e-mail signature, or change your password.

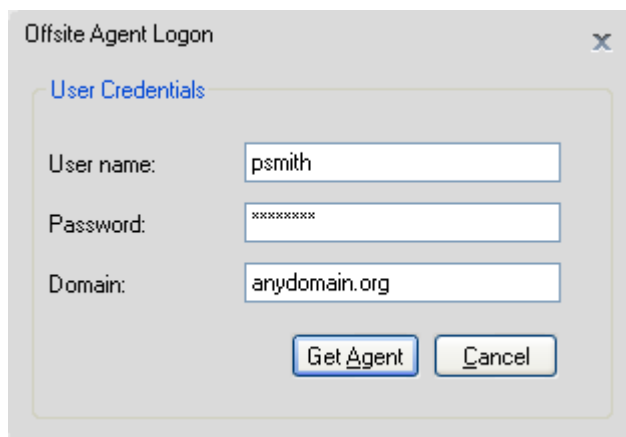
### Offsite Agent dialog

In addition to the standard Agent Desktop toolbars and dialogs, Offsite Agent provides additional login and progress dialogs. These dialogs allow you to enter your access credentials to connect to the contact center and specify the remote telephone you are using for the session. The fields that are available for editing depend on the specific configuration that the Offsite Agent administrator has applied for your agent profile.

The first time you start Agent Desktop it displays the Choose Agent Desktop Mode dialog. You use this dialog to choose whether you are using Agent Desktop as an onsite or offsite agent. Agent Desktop stores this setting and does not prompt you for it again.

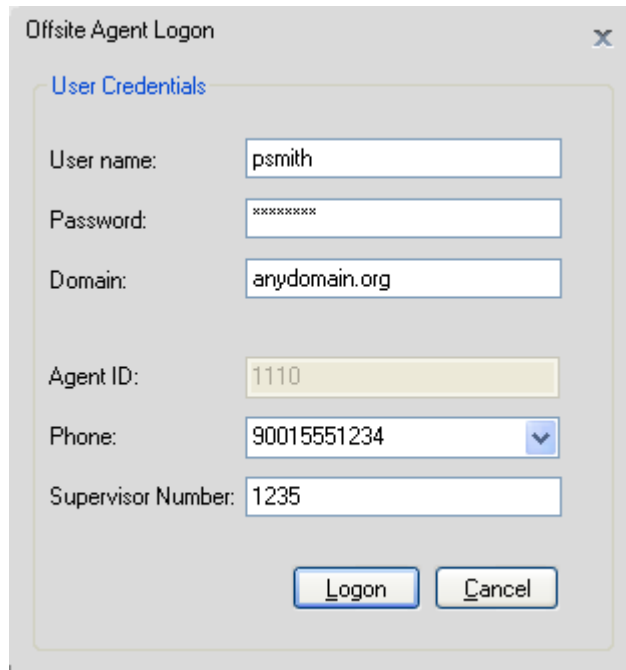


You use the Offsite Agent Logon dialog to enter your access credentials to connect to the contact center. This is a two-step process, requiring that you first validate your agent profile, and then accept or modify your offsite phone number. Your Offsite Agent administrator should provide you with your access details.



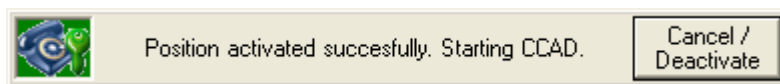
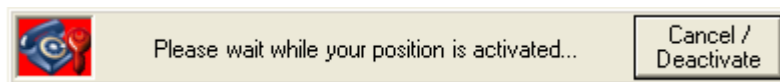
When Agent Desktop validates your log on credentials, the Offsite Agent Logon dialog displays your agent ID and default offsite phone number. You can edit the existing number or select other numbers depending on the permissions that the Offsite Agent

administrator has applied to your user profile. You can also enter a number at which to reach your supervisor. Agent Desktop stores the settings on this dialog and displays them as the default values at your next logon.



The screenshot shows a dialog box titled "Offsite Agent Logon" with a close button (X) in the top right corner. The dialog is divided into a "User Credentials" section and a section for additional information. The "User Credentials" section includes fields for "User name:" (containing "psmith"), "Password:" (containing "\*\*\*\*\*"), and "Domain:" (containing "anydomain.org"). Below this are fields for "Agent ID:" (containing "1110"), "Phone:" (containing "90015551234" with a dropdown arrow), and "Supervisor Number:" (containing "1235"). At the bottom of the dialog are two buttons: "Logon" and "Cancel".

When you complete your phone number details, Agent Desktop indicates the progress of your connection to the Offsite Agent server. You have the option of cancelling the connection.



The Agent desktop displays on the screen, with the agent in a logged-out state. To complete the Contact Center logon, the agent selects Logon from the Select Agent Status list.

**Overview of the Offsite Agent desktop application**



# Offsite Agent user workflow

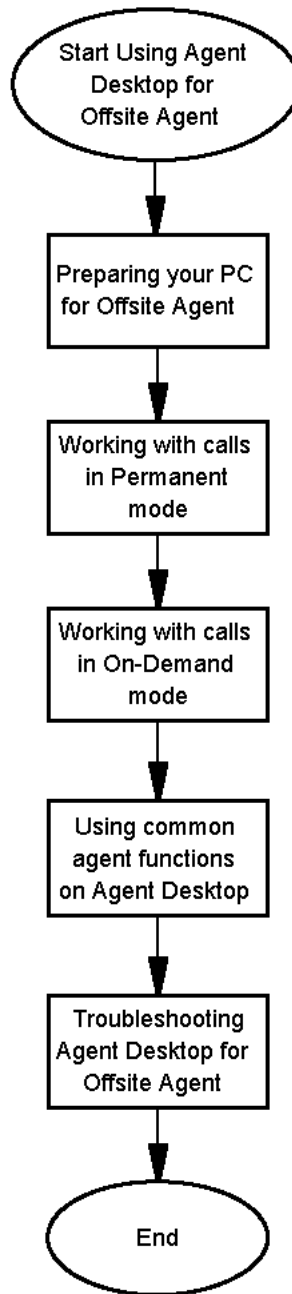
This chapter outlines the workflow for using the Offsite Agent packaged application as an offsite agent.

## Overview of AAOA user tasks

This workflow shows the high-level tasks that an offsite agent using Offsite Agent will carry out. To link to any task go to [Navigation \(page 18\)](#)

## Offsite Agent user workflow

### Offsite Agent user tasks



### Navigation

- [Preparing an offsite PC for Agent Desktop \(page 21\)](#)
- [Handling Telephony calls in Permanent Connection mode \(page 29\)](#)
- [Handling Telephony calls in On Demand mode \(page 33\)](#)

- [Common agent functions on Agent Desktop \(page 39\)](#)
- [Troubleshooting Agent Desktop on Offsite Agent \(page 45\)](#)



# Preparing an offsite PC for Agent Desktop

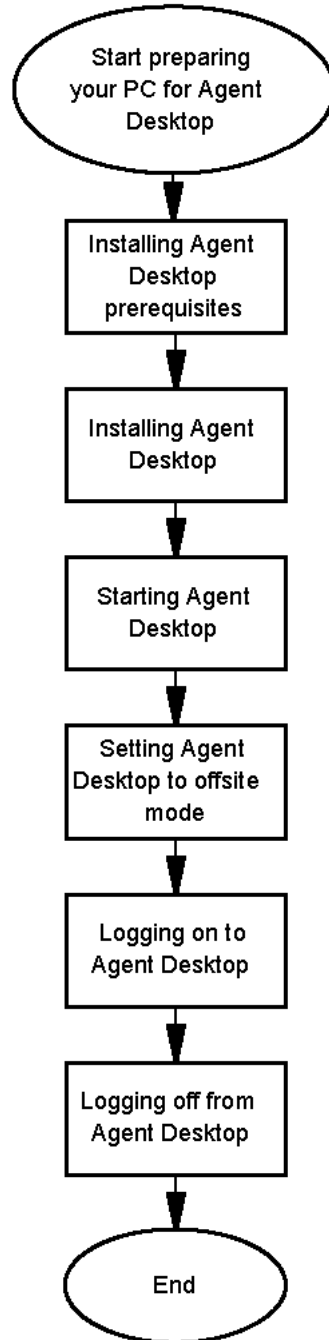
This chapter describes how to prepare an offsite PC for Agent Desktop.

## Agent Desktop offsite configuration steps

The following figure outlines the tasks to prepare your PC to support you working as an offsite agent. To link to any task, see [Navigation \(page 22\)](#)

## Preparing an offsite PC for Agent Desktop

### Agent Desktop offsite PC configuration task flow



#### Navigation

- [Installing the Agent Desktop prerequisites \(page 23\)](#)
- [Installing Agent Desktop \(page 23\)](#)

- [Starting Agent Desktop \(page 24\)](#)
- [Setting Agent Desktop to offsite mode \(page 25\)](#)
- [Logging on to Agent Desktop \(page 25\)](#)
- [Logging off from and exiting the Agent Desktop \(page 27\)](#)

## Installing the Agent Desktop prerequisites

Agent Desktop requires Microsoft .NET framework 3.5, Windows Installer 3.1 Redistributable (v2), Microsoft Visual C++ 2005 SP1 Redistributable Package (x86) installed on your computer. You can install these components from the Agent Desktop server.

### Prerequisites

- Access your corporate network through your broadband connection.

### Procedure steps

Step	Action
1	In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator for Agent Desktop. The correct URL format is <Agent Desktop servername>/agentdesktop.
2	Click <b>Install Prerequisites</b> .
3	Follow the on-screen instructions to complete installing the Agent Desktop prerequisites.

--End--

## Installing Agent Desktop

Agent Desktop uses smart client technology to push the Agent Desktop client to your desktop. There is no installation program as such, you install the application by entering a URL in your internet browser. Agent Desktop does not include a desktop icon, but it is possible to create one for ease of access.

### Prerequisites

- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit and that you have a valid User ID, Password, and Domain for use with Agent Desktop.
- Access your corporate network through your broadband connection.

## Preparing an offsite PC for Agent Desktop

### Procedure steps

- | Step | Action   |
|------|--|
| 1    | In Windows Explorer or Internet Explorer, enter the HTTP address (URL) provided by your system administrator for Agent Desktop. The correct URL format is <Agent Desktop servername>/agentdesktop. |
| 2    | Click <b>Launch</b> Agent Desktop.   |
| 3    | Click <b>Install</b> .   |

--End--

## Creating a shortcut to the Agent Desktop

Create a shortcut to the Agent Desktop to quickly access the application without manually entering the URL.

### Procedure steps

- | Step | Action  |
|------|---|
| 1    | Right click on your Windows Desktop and select <b>New&gt;Shortcut</b> .   |
| 2    | In the <b>Type the location of the item</b> field, paste or type the HTTP address (URL) provided by your system administrator for AAAD. |
| 3    | Click <b>Next</b> .   |
| 4    | Enter a name for the shortcut in the <b>Type a name for this shortcut</b> field.  |
| 5    | Click <b>Finish</b> .   |

--End--

## Starting Agent Desktop

The Agent Desktop install creates a listing in the Windows Programs menu for access to the Agent Desktop. You can optionally create your own desktop icon for Agent Desktop.

### Prerequisites

- Ensure that the administrator has configured your Windows User ID in Communication Control Toolkit and that you have a valid User ID, Password, and Domain for use with Agent Desktop.
- Access your corporate network through your broadband connection.



### Procedure steps

- | Step | Action  |
|------|---|
| 1    | Click Windows <b>Start, All Programs, Avaya, Agent Desktop.</b><br><b>OR</b><br>Double-click the AAAD icon you created on your Windows Desktop. |

--End--

## Setting Agent Desktop to offsite mode

Start the Agent Desktop when you are ready to connect to the contact center.

The first time you start the Agent Desktop, the application prompts you to enter whether you are working offsite or onsite.

### Prerequisites

**Attention:** The server on which the Agent Desktop server software resides depends on the specific Contact Center configuration. It is important to get the correct server name from your Contact Center administrator.

### Procedure steps

- | Step | Action   |
|------|--|
| 1    | Click Windows <b>Start, All Programs, Avaya, Agent Desktop.</b><br><i>The <b>Choose Agent Desktop Mode</b> dialog appears.</i> |
| 2    | Select <b>Offsite.</b>   |
| 3    | Click <b>OK.</b>   |

*The **Offsite Agent Logon** dialog appears.*

--End--

## Logging on to Agent Desktop

Enter your Offsite Agent access details after you start the Agent Desktop. Depending on how the contact center administrator has set up Offsite Agent, these will include some or all of the following:

- Windows user name
- Windows password

## Preparing an offsite PC for Agent Desktop

- Windows domain
- Offsite telephone number
- Supervisor telephone number

### Procedure steps

- | Step | Action   |
|------|--|
| 1    | Start the Agent Desktop.<br><i>Agent Desktop displays the <b>Offsite Agent Logon</b> dialog.</i>   |
| 2    | Type your Windows user name in the <b>User name</b> field.   |
| 3    | Type your password in the <b>Password</b> field.   |
| 4    | Type your domain in the <b>Domain</b> field.   |
| 5    | Click <b>Get Agent</b> .<br><i>Agent Desktop expands the <b>Offsite Agent Logon</b> dialog to show additional fields.</i>                        |
| 6    | Verify that your agent id appears in the <b>Agent ID</b> field.  |
| 7    | From the Phone list, select the telephone number for your current offsite telephone.<br><b>OR</b><br>Enter the number of your current telephone. |
| 8    | Click <b>Logon</b> .<br><i>Agent Desktop displays the progress popups, and the Agent Desktop main window appears.</i>                            |
| 9    | Select <b>Login</b> from the Agent Status list.  |

--End--

## Variable definitions

Description	Value
User name	The username configured on CCT to work with Agent Desktop. This might be your normal Windows domain username, or a specific username provided by the Offsite Agent administrator. Your administrator should provide you with the correct username.
Password	The password for the user entered in the <b>User Name</b> field.
Domain	The Windows domain for the user entered in the <b>User Name</b> field. Your administrator should provide you with the correct domain.
Agent ID	Your Contact Center agent ID.
Phone	Your default offsite telephone number appears in this field. Depending on your profile settings you can select other numbers from the list or edit the number in this field.
Supervisor Number	The telephone number of your supervisor.

## Logging off from and exiting the Agent Desktop

Log off from the Agent Desktop when you are ready to exit the application.

### Prerequisites

Ensure that you do not have a contact open. If a contact is open, you must close it before you log off of the application.

### Procedure steps

- | Step | Action  |
|------|---|
| 1    | Select <b>Log Out</b> from the Agent Status list.<br><i>The top bar displays a Logged Out status message.</i> |
| 2    | Click the <b>Close</b> button.  |
| 3    | Click <b>Yes</b> .<br><i>Agent Desktop closes.</i>  |

--End--

## Preparing an offsite PC for Agent Desktop

# Handling Telephony calls in Permanent Connection mode

This chapter describes tasks that are specific to handling incoming telephone calls from customers on an offsite Avaya Aura™ Agent Desktop in Permanent Connection mode. For tasks that are common to both Offsite Agent operating modes, see [Common agent functions on Agent Desktop \(page 39\)](#).

You can use the Agent Desktop to perform the following telephone tasks:

- change your status to Ready or Not Ready
- originate calls
- end calls

In Permanent Mode the Offsite Agent server creates a nailed-up connection to your offsite telephone when you log on. You should not use the physical telephone for any functions. However, if you do accidentally hang up your physical telephone, Offsite Agent will immediately re-establish your connection by calling your phone. To resume working you merely answer the call. If you are on a customer call when this occurs, Offsite Agent connects you back into the customer call (if the customer has remained in the call).

You should use the Agent Desktop work list to invoke all agent functions, including End Call.

There are two configurations of Permanent Connection mode:

- Forced Answer
- Accept Call

If the Administrator configures Forced Answer, you do not need to take any action to answer calls. When the contact center routes a call to you, the Offsite Agent server bridges this onto your nailed-up connection. Offsite Agent plays a tone to alert you to the incoming call, and then immediately connects you with the customer. The Agent Desktop automatically updates the work list with the call status and details.

If the Administrator configures Accept Call, you are able to accept or reject a call using Agent Desktop. When the contact center routes a call to you, you to choose to accept or reject the call using a standard voice contact work item.

## Navigation

- [Changing your status to Ready \(page 30\)](#)
- [Changing your status to Not Ready \(page 30\)](#)
- [Accepting a call in Permanent Mode \(page 30\)](#)

## Handling Telephony calls in Permanent Connection mode

- [Making a call in Permanent Connection mode \(page 32\)](#)
- [Ending a call \(page 32\)](#)

## Changing your status to Ready

When you connect to Offsite Agent and log on to the contact center, by default your status is Not Ready. Change your status to Ready when you are available to receive contacts.

### Procedure steps

Step	Action
------	--------

1	Select <b>Go Ready</b> from the Agent Status list.
---	--

*Offsite Agent places you in **Ready** status. The top bar displays a Ready status message.*

--End--

## Changing your status to Not Ready

Change your status to Not Ready when you are temporarily unavailable to take calls. You cannot enter a reason code in Offsite Agent.

### Procedure steps

Step	Action
------	--------

1	Select <b>Go Not Ready</b> from the Agent Status list.
---	--

*Offsite Agent places you in **Not Ready** status. The top bar displays a Not Ready status message.*

--End--

## Accepting a call in Permanent Mode

If your contact center administrator has configured Forced Answer, you do not need to take any specific action to answer calls in Permanent Connection mode. Customer calls automatically connect to your telephone on the nailed-up connection. Offsite Agent plays a tone to alert you to the incoming call before it activates the speechpath. Agent Desktop automatically updates the call status.

If your contact center uses Accept Call for Offsite Agent, Agent Desktop displays a normal voice contact work item, allowing you to choose to accept or reject the call.

### Prerequisites

**Attention:** Depending on the capacity of your broadband connection and latency in the PSTN network, it is possible that the Agent Desktop response to an incoming call might not synchronize with the telephone ringing. Therefore you might be able to talk to a customer before Agent Desktop updates with the call status and information.

### Procedure steps

Step	Action
1	When you hear the Offsite Agent call alert on your phone, commence speaking with the customer. <b>OR</b> Click <b>Accept</b> on the voice contact work item and commence speaking with the customer.

--End--

## Declining a call in Permanent Mode

Decline a call if you want to reject the contact and place it back in the queue. The contact center then queues the contact to another agent and your status becomes Not Ready. You cannot receive new incoming contacts until you change your status to Ready.

### Prerequisites

**Attention:** If your Administrator has configured Call Force, you can reject a call only prior to hearing the incoming call tone on your telephone. This will be possible only if your Agent Desktop client alerts you to the incoming call before you hear the tone.

### Procedure steps

Step	Action
1	If the call appears on the Agent Desktop application, click <b>Release</b> on the call work item. <b>OR</b> Click <b>Release</b> on the voice contact work item window.

--End--

### Making a call in Permanent Connection mode

Make a call using the Agent Desktop. Ensure that you follow the correct steps based on the type of telephone number you want to call:

- a new external telephone number
- a new internal telephone number

#### Prerequisites

**Attention:** If you have an active customer call on your set, you cannot originate another call. If you want to consult with a supervisor or another agent, then you must use the conference feature.

#### Procedure steps

- | Step | Action  |
|------|---|
| 1    | On the action bar, click <b>Originate Call</b> .  |
| 2    | Select <b>Use Trunk Access Code</b> and type the access code in the <b>Use Trunk Access Code</b> box and telephone number in the <b>Destination Number</b> box and click <b>Initiate Contact</b> .<br><b>OR</b><br>Type an internal telephone number in the <b>Destination Number</b> field and click <b>Initiate Contact</b> . |
| 3    | Click <b>Release</b> on the call work item when you complete the call.  |

--End--

### Ending a call

End a call when a call is completed. If you were in Ready status before the call, you automatically return to Ready when you terminate the call. If you require time to perform call wrap-up tasks before you accept another call, change your status to Not Ready.

#### Procedure steps

- | Step | Action                                      |
|------|---|
| 1    | Click <b>Release</b> on the call work item. |

--End--



# Handling Telephony calls in On Demand mode

This chapter describes tasks specific to handling customer calls on an offsite Avaya Aura™ Agent Desktop in On Demand mode. For tasks that are common to both Offsite Agent operating modes, see [Common agent functions on Agent Desktop \(page 39\)](#).

When using Offsite Agent in On Demand mode the following telephone tasks have some differences from normal onsite operation

- Changing your status to Ready or Not Ready.
- Accepting and declining incoming contacts.

In On Demand mode you log on to Offsite Agent without taking your offsite telephone off hook, and you use the Agent Desktop controls to make yourself Ready or Not Ready. The Offsite Agent server creates a new call to your offsite telephone for each customer call that Contact Center Manager Server routes to you. Your telephone rings, and Agent Desktop displays the call status and details. However, you accept the call only by lifting your telephone handset.

If you need to use your offsite telephone to take a non-contact center call, or to make a personal call, you must remember to make your status Not Ready on Agent Desktop. If you remain in Ready status when your telephone is busy on a non-contact center call, Offsite Agent might still attempt to route a customer call to you. In such cases the Agent Desktop toolbar will indicate that a call is being presented. If the administrator has implemented the call presentation class recommended by Avaya for Offsite Agent, then the call will return to the queue when it is not answered.

When you receive a call on your telephone that is not a customer call, Offsite Agent cannot flag this. Agent Desktop can display call status and information only for contact center calls.

## Navigation

- [Changing your status to Ready in On Demand mode \(page 34\)](#)
- [Changing your status to Not Ready in On Demand mode \(page 34\)](#)
- [Accepting a call \(page 34\)](#)
- [Declining a call \(page 35\)](#)
- [Making a call in On Demand mode \(page 36\)](#)
- [Ending a call \(page 36\)](#)

## Changing your status to Ready in On Demand mode

When you connect to Offsite Agent and log on to the contact center, by default your status is Not Ready. Set your status to Ready when you are available to receive customer calls.

### Procedure steps

Step	Action
------	--------

1	Select <b>Go Ready</b> from the Agent Status list.
---	--

*Offsite Agent places you in **Ready** status. The top bar displays a Ready status message.*

--End--

## Changing your status to Not Ready in On Demand mode

Change your status to Not Ready when you are temporarily unavailable to take calls. In On Demand mode you must do this if you use your offsite telephone for non-contact center calls (e.g., receiving a personal call).

You cannot enter a reason code in Offsite Agent.

### Procedure steps

Step	Action
------	--------

1	Select <b>Go Not Ready</b> from the Agent Status list.
---	--

*Offsite Agent places you in **Not Ready** status. The top bar displays a Not Ready status message.*

--End--

## Accepting a call

Accept telephone calls by lifting the handset on your telephone. (When used for Offsite Agent, Agent Desktop greys out the Accept button.)

### Prerequisites

**Attention:** Depending on the capacity of your broadband connection and latency in the PSTN network, it is possible that the Agent Desktop response to an incoming call might not synchronize with the telephone ringing.

**Attention:** Offsite Agent cannot flag non-contact center calls on your telephone: when you answer a non-contact center call, you must remember to set your status Not Ready on Agent Desktop.

### Procedure steps

Step	Action
------	--------

- 1 When your telephone rings, answer the call by taking the telephone off hook.
- 2 If it is a customer call, Agent Desktop updates the display with call information.
- 3 If it is not a customer call, select **Go Not Ready** from the Agent Status list.

*Offsite Agent places you in **Not Ready** status. The top bar displays a Not Ready status message.*

--End--

## Declining a call

Decline a call if you want to reject the contact and place the contact back in the queue. The contact is then queued to another agent and your status becomes Not Ready. You cannot receive new incoming contacts until you change your status to Ready.

### Prerequisites

**Attention:** Depending on the capacity of your broadband connection and latency in the PSTN network, it is possible that the Agent Desktop response to an incoming call might not synchronize with the telephone ringing. If the Agent Desktop response is later than the telephone ringing you might not be able to make a decision on whether the call is from the contact center or another source.

### Procedure steps

Step	Action
------	--------

- 1 If the call appears on the Agent Desktop application, click **Release** on the call work item.
- 2 Alternatively, if the call rings on the telephone, do not pick up the handset.

--End--

### Making a call in On Demand mode

Make a call using the Agent Desktop. When working in On Demand mode, if you make a call by using the Agent Desktop, it has the following results:

- the Offsite Agent server makes a call to your offsite phone and bridges it to the phone number you want to call
- you will show up on your supervisor's Real Time Display, and on subsequent reports, as being on a DN call
- you do not need to make yourself Not Ready
- the contact center pays the call tariff

Ensure that you follow the correct steps based on the type of telephone number you want to call:

- an external telephone number
- an internal telephone number

### Prerequisites

**Attention:** If you have an active customer call on your set, you cannot originate another call. If you want to consult with a supervisor or another agent, then you must use the conference feature. See [Using the conference feature to consult a colleague \(page 40\)](#).

### Procedure steps

- | Step | Action  |
|------|---|
| 1    | On the action bar, click <b>Originate Call</b> .  |
| 2    | Select <b>Use Trunk Access Code</b> and type the access code in the <b>Use Trunk Access Code</b> box and telephone number in the <b>Destination Number</b> box and click <b>Initiate Contact</b> .<br><b>OR</b><br>Type an internal telephone number in the <b>Destination Number</b> field and click <b>Initiate Contact</b> . |
| 3    | Click <b>Release</b> on the call work item when you complete the call.  |

--End--

### Ending a call

End a call when you have finished speaking with the customer. If you require time to perform call wrap-up tasks before you accept another call, change your status to Not Ready.

**Procedure steps**

<b>Step</b>	<b>Action</b>
1	Hang up your telephone or click <b>Release</b> on the call work item.

**--End--**

## Handling Telephony calls in On Demand mode

# Common agent functions on Agent Desktop

This chapter describes how to work with active calls on an offsite Avaya Aura™ Agent Desktop. These actions are the same whether you are working in Permanent Connection or On Demand mode. They are identical to those for onsite agents using Agent Desktop.

## Navigation

- [Placing a call on hold \(page 39\)](#)
- [Releasing a call on hold \(page 39\)](#)
- [Using the conference feature to consult a colleague \(page 40\)](#)
- [Transferring a call \(page 41\)](#)
- [Conferencing in another agent \(page 41\)](#)
- [Conferencing in a supervisor \(page 42\)](#)
- [Calling your supervisor \(page 42\)](#)
- [Using the Emergency key \(page 42\)](#)

## Placing a call on hold

Place a call on hold to interrupt your current call. When you want to speak to the caller again, release the call from hold.

The contact timer on the work item changes to orange characters while the work item is on hold.

### Procedure steps

Step	Action
1	On the work item, click <b>Hold</b> .

*The call is placed on hold, the contact timer color changes to orange, and the **Hold** button changes to **Unhold**.*

--End--

## Releasing a call on hold

Release a call that you placed on hold when you want to speak to the caller again.

### Procedure steps

Step	Action
------	--------

1	On the work item, click <b>Unhold</b> .
---	---

*The call is taken off hold, the contact timer color changes to green, and the **Unhold** button changes to **Hold**.*

--End--

## Using the conference feature to consult a colleague

In an onsite contact center, agents frequently use the Hold feature to temporarily hold a customer call while they consult a colleague. This consult could be speaking to some one at the next desk, or using the DN key on the telephone to place a call to an expert.

Offsite agents using a single line telephone will not be able to place a call on hold and then originate another call.

To temporarily hold a customer call and consult a colleague, use the Conference feature on Agent Desktop.

### Prerequisites

- You are on a customer call.
- You know the number of the person you want to consult.

### Procedure steps

Step	Action
------	--------

1	On the work item, click <b>Conference</b> to place the customer on hold and open the Conference window.
---	---

2	In the Conference window, in the <b>Number</b> box, type the number of the agent to conference into the call.
---	---

3	Click <b>OK</b> to begin the conference.
---	--

*The Conference and Unhold buttons flash.*

4	When you have finished speaking to the person you have consulted, click <b>Unhold</b> . Agent Desktop terminates the consult call and returns you to the customer call.
---	---

--End--



## Transferring a call

You can transfer a call to another agent in your contact center. You can perform a supervised transfer or a blind transfer. In a supervised transfer, the call is placed on hold, and you speak to the third party before completing the transfer. In a blind transfer, which is the default option, you transfer the call without speaking to the third party.

### Procedure steps

- | Step | Action   |
|------|--|
| 1    | On the telephony toolbar, click <b>Transfer</b> .  |
| 2    | In the <b>Transfer</b> window, <b>Blind Transfer</b> is automatically selected.  |
| 3    | In the <b>Number to Transfer</b> box, type the number to which you want to transfer the call.<br><br><i>If you select <b>Supervised Transfer</b>, the active call is placed on hold and a call is placed to the third party. While you speak with the third party, the <b>Transfer</b> and <b>Hold</b> buttons both flash to indicate that you have a customer on hold and that you must complete the transfer by pressing the <b>Transfer</b> button.</i> |
| 4    | Click <b>OK</b> .<br><br><i>The call is transferred to the third party and is dropped from your telephone. The call timer stops.</i>   |

--End--

## Conferencing in another agent

Conference in another agent if you want to speak to your customer and another agent from the contact center.

### Procedure steps

- | Step | Action  |
|------|---|
| 1    | On the work item, click <b>Conference</b> to place the customer on hold and open the Conference window.         |
| 2    | In the Conference window, in the <b>Number</b> box, type the number of the agent to conference into the call.   |
| 3    | Click <b>OK</b> to begin the conference.  |
| 4    | Speak with the agent, if necessary, before you conference in the customer.                                      |
| 5    | Click <b>Conference</b> again to take the customer off hold and conference in the customer and the other agent. |

--End--

## Conferencing in a supervisor

Conference in a supervisor if you want to speak to your customer and your contact center supervisor.

### Procedure steps

- | Step | Action   |
|------|--|
| 1    | On the Agent Desktop Action bar menu, click <b>Supervisor</b> to place the customer on hold and conference in your supervisor. |
| 2    | Speak to your supervisor, if necessary, before you conference in the customer.   |
| 3    | Click <b>Supervisor</b> again to take the customer off hold and conference in the customer and your supervisor.                |

--End--

## Calling your supervisor

You can call your supervisor if you are not currently handling a call.

To call a supervisor when you are on a call, see [Conferencing in a supervisor \(page 42\)](#).

### Procedure steps

- | Step | Action  |
|------|---|
| 1    | On the Action bar, click <b>Call Supervisor</b> . |

--End--

## Using the Emergency key

Use the Emergency key if you require immediate assistance from your contact center supervisor while handling a call. For example, if you talk to a customer who suddenly threatens you, you may want to add your supervisor to the call immediately. On Offsite Agent the emergency key initiates a conference in the same way as conferencing your supervisor.

### Procedure steps

- | Step | Action   |
|------|--|
| 1    | On the Agent Desktop Top bar menu, click <b>Emergency</b> to place the customer on hold and conference in your supervisor. |
| 2    | Speak to your supervisor, if necessary, before you conference in the customer.   |

- 3** Click **Emergency** again to take the customer off hold and conference in the customer and your supervisor.

**--End--**



# Troubleshooting Agent Desktop on Offsite Agent

This chapter describes how to troubleshoot faults that may occur in Agent Desktop when it is used on an offsite PC.

## Prerequisites for Offsite Agent troubleshooting

- Ensure you have correctly installed the Agent Desktop client.
- Ensure that your broadband connection is operational.

## Navigation

- [I cannot get a connection to the Agent Desktop server \(page 46\)](#)
- [I am on a call but the Agent Desktop displays a new contact \(page 46\)](#)
- [Agent Desktop stops responding but my Permanent Mode connection stays up \(page 46\)](#)

## I cannot get a connection to the Agent Desktop server

This procedure describes things to check if you cannot connect to the Agent Desktop server using the URL supplied by your administrator.

### Procedure steps

Step	Action
1	Check whether your broadband connection is up and you can access general Internet sites, e.g. www.avaya.com.
2	Check whether you can connect to other servers in your corporate domain, e.g. corporate e-mail.
3	If your broadband connection is working and you can connect to other servers in your corporate domain, contact the Offsite Agent administrator for assistance.

--End--

## I am on a call but the Agent Desktop displays a new contact

This procedure describes the actions to take if you receive a contact notification on the Agent Desktop while you are already on a call. The most likely cause if you are in On Demand mode is that you have taken or made a non-contact center call using your telephone, but did not make yourself Not Ready.

### Procedure steps

Step	Action
1	Check whether you are in Ready state.
2	Select <b>Go Ready</b> from the Agent Status list to change yourself to Not Ready.

--End--

## Agent Desktop stops responding but my Permanent Mode connection stays up

This procedure describes the actions to take if your Agent Desktop stops responding but your Permanent Mode call stays up. The most likely cause of this situation is a loss of connection between your desktop computer and the Agent Desktop server.

You need to disconnect your permanent mode call by exceeding the Permanent Mode hang-up limit of five hang-ups in fifteen seconds.

**Procedure steps**

- | <b>Step</b> | <b>Action</b>   |
|-------------|---|
| 1           | Hang up your telephone. The Offsite Agent application will immediately ring your telephone again.               |
| 2           | Answer your telephone and hang up.  |
| 3           | Repeat the previous step four more times within a fifteen-second period to fully disconnect from Offsite Agent. |
| 4           | Exit the Agent Desktop application, and restart it.   |
| 5           | If you cannot connect to your Agent Desktop server, contact your contact center Administrator for guidance.     |

**--End--**





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