# myAgent

**User Guide**

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

# Contents

# 1 About this Documentation

This section contains some introductory information on this documentation.

## 1.1 Types of Topics

The types of topics include concepts and operating instructions.

| Type of topic | Contents | Title |
|---|---|---|
| Concept | Explains the "What". | without a verb as in "Queue Details" or with a gerund as in *Displaying the Queue Details*. |
| Operating instructions | Describe task-oriented application cases – i.e., the "How" – and assumes familiarity with the associated concepts. | Starts with "How to" followed by a verb, e.g., *How to Display Queue Details*. |

## 1.2 Display Conventions

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

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

# 2 Introduction

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

## 2.1 myAgent

myAgent is a convenient application for the distribution and handling of calls, faxes and e-mails to and by the agents of a Contact Center.

myAgent provides the following features:
- Processing of
    - Make Call
    - Faxes
    - E-mails
- Callback function for agents
- Displaying and changing the agent status
- Displaying and changing the presence status of internal subscribers of the communication system
- Real-time presentation of queues
- Recording of calls, if activated in the communication system
- Request for assistance through
    - Silent monitoring of calls (depending on country)
    - Overriding calls
    - Instant Messaging
- Integration of the internal directory, external directory and the external offline directory (LDAP) for searches by name
- Creation of reports based on predefined report templates

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

## 2.2 User Interface Elements

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

The main window consists of the following elements:
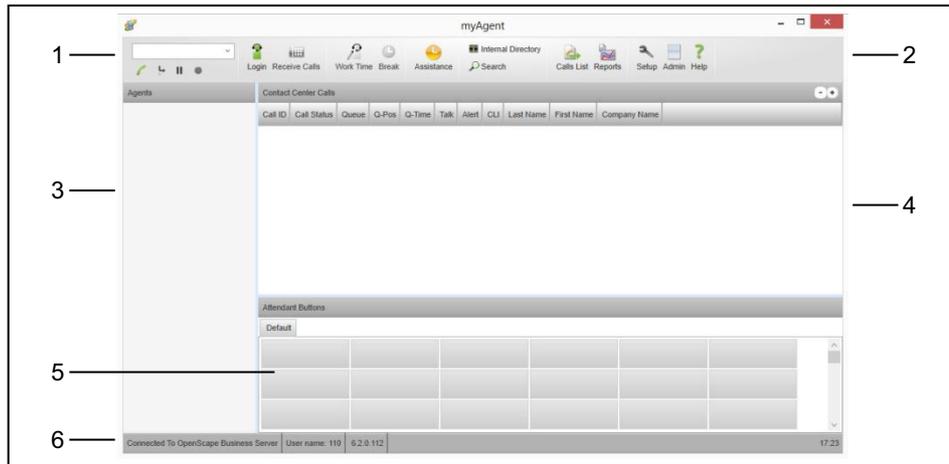
- the area Telephony (1) with
  - a drop-down list for call numbers The drop-down list contains up to ten previously dialed numbers and serves as an input field for numbers to be dialed or names to be found.
  - the following symbols:

| Symbol | Function |
|---|---|
| | **Answer**, **Hang up** or **Dial** (situation-based) |
| | **Search** (situation-based) |
| | **Transfer** |
| | **Place call on hold** |
| | **Record** |

- Toolbar (2) with the following symbols:

| Symbol | Function |
|:---:|:---|
|  | • **Login** <br> • **Logout** |
|  | **Available** |
|  | **Wrap up** |
|  | **Break** |
|  | **Assistance** |
|  | **Internal directory** |
|  | **Search** |
|  | **Caller list** |
|  | **Reports** (only for agents with the Supervisor or Administrator authorization level) |
|  | **Setup** |
|  | **Admin** (only for agents with the Supervisor or Administrator authorization level) |
|  | **Help** |

- **Agent Binding List** (3): Shows the assignment of agents to queues as well as the current agent status.
- **List of Contact Center Calls** (4):
  Shows detailed information on the current calls, faxes and e-mails.
- Display areas for **Attendant buttons**, **wallboard**, **Grade of Service** graph or **Average Times** graph (5) (switchable by clicking on the respective header):
  - **Attendant Buttons**
    Provides buttons for fast access to internal subscribers.

- **Wallboard**
  Shows call, fax and e-mail statistics for the current day in tabular form.
- **Grade of Service** graph
  Shows call, fax and e-mail statistics for the current day in graphical form.
- **Average Times** graph
  Shows statistical details on the waiting times and talk/reading times for the queued calls, faxes and e-mails on the current day in a graphical chart.
- Status bar (6), with information on
  - the status of the connection to the application server
  - the user name
  - the software version of myAgent
  - the time

**Tooltips**

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

**Related Topics**

- Call Processing
- Call Functions
- Attendant Buttons
- Call Functions
- Attendant Buttons

# 3 Installing and Starting myAgent

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

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

## 3.1 How to Install myAgent

*Prerequisites*

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

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

*Step by Step*

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

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

3) Click **Next**.

4) Select the installation directory and click **Next**.

5) Activate the radio button **Custom** and click **Next**.

6) Select the **myAgent** feature to install it and click **Next**.

7) Follow the instructions of the installation program.

**Related Topics**
- How to Start myAgent
- How to Uninstall myAgent

## 3.2 How to Start myAgent

*Prerequisites*

- myAgent is installed on your PC.

- You are configured as an Agent in the communication system.

*Step by Step*

1) Click **Start > Program Files > Communication Clients > myAgent**. You will then be presented with the login screen.

2) Enter your user name in the **Login Name** field. This is usually your call number. If you have any questions, please contact the administrator of your communication system.

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

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

4) If you want to use myAgent with an automatic login in the future, enable the **Save Password check box**.

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

5) Enter the IP address of your application server in the **Server Address** field.

6) Click **Login**.

> *INFO:* When you start myAgent for the first time, you will be asked to change the password. This prompt is not displayed if you have already changed the password via myAttendant, myPortal for Desktop, myPortal for Outlook or via the phone menu of the voicemail box.
>
> Enter your current password in the **Old password** field (the default password when logging in for the first time is `1234`).
>
> Enter your new password, which must consist of only digits and include at least six digits, in the **New password** and **Confirm password** fields.
>
> The password applies to myAgent, myReports, myAttendant, myPortal for Desktop, myPortal for Mobile, myPortal for OpenStage, myPortal for Outlook and Fax Printer as well as phone access to your voicemail box.

*Next steps*

Log into the queue(s) to be available for calls, faxes and e-mails.

**Related Topics**

- How to Install myAgent
- How to Log into a Queue

## 3.3 How to Uninstall myAgent

*Step by Step*

*1)* Close myAgent.

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

*2)* Select one of the following options:

- Windows XP: Double-click in the **Control Panel** on **Software**.
  Click on the **CommunicationsClients** item and then on **Edit**.

- Windows Vista: Double-click in the **Control Panel** on **Programs and Features**.
  Click on **Edit** in the context menu of the **CommunicationsClients** entry.

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

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

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

*5)* Follow the instructions of the uninstallation program.

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

**Related Topics**
- How to Install myAgent

## 3.4 Automatic Updates

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

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

## 3.4.1 How to Perform Automatic Updates

*Prerequisites*

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

*Step by Step*

> › Close the named programs.

*Next steps*

Restart myAgent after the automatic update.

# 4 First Steps

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

**Select the language**

Select the language of the user interface of myAgent.

**Logging into Queues**

Log into the queue(s) to be available for calls, faxes and e-mails.

**Custom Configuration**

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

## 4.1 How to Select the User Interface Language

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Appearance**.

3) Select the desired language in the **Language** drop-down list.

4) Click **OK**.

*Next steps*

Close and restart myAgent.

## 4.2 How to Log into a Queue

*Step by Step*

1) Click on **Login** in the tool bar.

2) In the **Extension** drop-down list, select the station number of the phone you intend to use as an agent and click **OK**.

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

# 5 Functions for Agents with the Authorization Level of an Agent

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

## 5.1 Queues

A queue lines up incoming calls, faxes and e-mails sequentially based on their time of arrival and distributes them to available agents.

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

**Statistical information**

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

## 5.1.1 How to Log into a Queue

***Step by Step***

*1)* Click on **Login** in the tool bar.

*2)* In the **Extension** drop-down list, select the station number of the phone you intend to use as an agent and click **OK**.

**Related Topics**
• How to Start myAgent

## 5.1.2 How to Log out from a Queue

***Step by Step***

› Select one of the following options:

- If you are not conducting a call at present and are not receiving a contact center call, click on **Log Out** in the tool bar.

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

---

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

---

## 5.2 List of Contact Center Calls

The **List of Contact Center Calls** shows details on the current calls, faxes and e-mails in real time.

As an agent with the Agent authorization level, you can see the calls, faxes and e-mails of every queue to which you are currently assigned. As an agent with authorization level of a Supervisor or Administrator, you can see the calls, faxes and e-mails of all queues. The following information is displayed:

- **Call ID**
  A unique number identifying a call, fax or e-mail. It is increased by one with every call, fax and e-mail.

- **Call status**
  - For a call: shows whether the caller is still waiting or on the phone (talking).
  - For a fax or e-mail: shows whether the fax or e-mail has already been read.

- **Queue**

- **Q-Pos**
  Position in the queue

- **Wait time**
  Time spent waiting, in seconds

- **Talk**
  - For a call: Time spent talking, in seconds
  - For a fax or e-mail: time spent, in seconds, from the opening of the fax or e-mail until the screen pop is closed

- **Pickup**
  - For a call: time spent, in seconds, from the first ring at this agent until acceptance
  - For a fax: time spent, in seconds, from the time the fax was placed in the queue until it is accepted by an agent
  - For an e-mail: time spent, in seconds, from the time the e-mail was placed in the queue until it is answered by an agent

- **Callno**
  - For a call: phone number of the caller, if transmitted

> – For a fax or e-mail: fax number or e-mail address of the sender, if
>   transmitted

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

The **List of Call Center Calls** can be sorted.

Calls and e-mails for which the waiting time in the queue has exceeded the alarm
threshold value are displayed in the **List of Contact Center Calls** in red.

## 5.3 Call Processing

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

During call processing you can

- Add contact details for a caller:
  You can save the following contact details for a caller for calls with a
  transmitted call number: **Title**, **First Name**, **Last Name** and **Company**. These
  details are saved in the external directory and subsequently displayed in the
  myAgent Inbound Call screen pop for calls from the same number as soon as
  the external directory has been updated in the client. In this case, the caller's
  phone number is assigned and set as the **Business 1** phone.
- View information on the current caller or save details yourself for future calls:
  This information includes the following details: **Type** (Warning, Question,
  Information), **Date / Time**, **Agent** and **Message**.
- View the call history:
  The calls history shows details on all previous calls of the same caller with
  **Date / Time**, **Queue**, **Agent / Status** and **Phone No.**. The type of call is
  represented by a symbol (inbound call, recorded call, etc.).
- Perform a wrapup:
  During the wrapup, you can assign incoming calls to a specific category (e.g.,
  Orders, Claims, Service, etc.). The assignment is made after completing the
  call (during the wrapup period) by selecting a wrapup reason. An agent with

the Supervisor or Administrator authorization level can define the wrapup reasons intended for a queue in the WBM and organize them into groups. When doing so, he or she also defines whether the specification of a wrapup reason is mandatory. You can also specify multiple wrapup reasons for a call. By evaluating the wrapup reasons, agents with the Supervisor or Administrator authorization level, for example, track the success of a promotion.

The primary aids for processing calls are the myAgent Inbound Call screen pop and the **List of Contact Center Calls**.

**Screen Pop for Calls**

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

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

**Related Topics**
- User Interface Elements
- Call Functions

# 5.3.1  How to Answer a Call

*Step by Step*

› Select one of the following options:

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

- Click on **Answer** in the Telephony area of the myAgent main window.

## 5.3.2 How to Add Contact Details of the Current Caller

*Step by Step*

1) Click on **Caller Information** in the screen pop of the incoming myAgent call.

2) Enter the **Title**, **First Name**, **Last Name** and **Company** and then click **Save**.

## 5.3.3 How to Add Information on the Current Caller

*Step by Step*

1) Click on **Caller Information** in the screen pop of the incoming myAgent call.

2) Click **Add**.

3) Select the desired type from the **Message type** drop-down list. The following options are available: **Warning**, **Question** and **Note**.

4) Enter the desired text in the **Message** field and then click **OK**.

## 5.3.4 How to Edit Information on the Current Caller

*Step by Step*

1) Click on **Caller Information** in the screen pop of the incoming myAgent call.

2) Click on the desired item in the list of information and then on **Edit**.

3) Select the desired type from the **Message type** drop-down list. The following options are available: **Warning**, **Question** and **Note**.

4) Enter the desired text in the **Message** field and then click **OK**.

## 5.3.5 How to Display the History of the Current Caller

*Step by Step*

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

## 5.3.6 How to Complete a Call

*Step by Step*

1) Select one of the following options:

 • Click on **Hang Up** in the screen pop of the incoming myAgent call.

 • Click on **Hang Up** in the Telephony area of the myAgent main window.

**2)** If relevant, enter a wrapup reason; see *How to Specify a Wrapup Reason*.

**3)** Click on **Close** to close the screen pop of the incoming myAgent call.

## 5.3.7 How to Specify a Wrapup Reason

*Prerequisites*

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

*Step by Step*

**1)** Select one of the following options:

- Click on **Wrap up** in the screen pop of the incoming myAgent call.
- Click on **Wrap up** in the Telephony area of the myAgent main window.

**2)** Select one of the following options:

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

**3)** Click **OK**.

## 5.3.8 How to Become Available Again after a Missed Call

*Step by Step*

**›** Click in the **Missed Call** screen pop on **OK**.

## 5.4 Fax and E-mail Processing

You can use myAgent to receive e-mails and faxes and to assign them to specific categories (orders, complaints, service, etc.).

When processing faxes and e-mails, you can

- View the history
  All previous faxes and e-mails from the same sender are displayed with the **Date / Time** and **Subject**.

- Perform a wrapup:
  During the wrapup, you can assign the received faxes and e-mails to specific categories (orders, complaints, service, etc.). The assignment is made during the wrapup period by selecting a wrapup reason. An agent with the Supervisor or Administrator authorization level can define the wrapup reasons intended for a queue in the WBM and organize them into groups. When doing so, he or she also defines whether the specification of a wrapup reason is mandatory. You can specify multiple wrapup reasons for received faxes and e-mails. By evaluating the wrapup reasons, agents with the Supervisor or Administrator authorization level, for example, track the success of a promotion.
- Flag a fax or e-mail for follow-up.
  You can set a time after which the fax or the e-mail will be delivered to you again.

The primary aids for processing faxes and e-mails are the **Inbound Fax** and **Received Email** screen pops and the **List of Contact Center Calls**.

**Screen Pop for Faxes**

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

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

The contents of the fax is displayed on the screen as a PDF or TIFF file. Your administrator can configure whether the fax message is stored as a PDF or a TIFF file on a is stored basis (not possible with OpenScape Office).

**Screen Pops for E-mails**

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

- Information on the e-mail:
  **Queue**, **From** (e-mail address of the sender), **Date / Time**, **CC** (additional recipients of the e-mail, if any) and **Subject**.
- E-mail text
- **Attachments**
- **Wrapup** button

- **Dial** button
- **Reschedule** button
- **Answer**
- **Reply**
- **History**

## 5.4.1 How to Accept a Fax

*Step by Step*

> › Click on **Answer** in the screen pop of the received fax.
>
> The contents of the fax is displayed on the screen as a PDF or TIFF file.

## 5.4.2 How to Accept an E-mail

*Step by Step*

> › Click in the Received Email screen pop on **Answer**.

## 5.4.3 How to Reply to a Fax

*Step by Step*

> › Click in the **Inbound Fax** screen pop on **Reply**.

## 5.4.4 How to Reply to an E-mail

*Step by Step*

> › Click in the **Received Email** screen pop on **Reply**.

## 5.4.5 How to Complete a Fax

*Prerequisites*

- You have finished processing the fax.

*Step by Step*

1) Select the check box **This fax is completed** in the screen pop of the fax.

2) Click **Close**.

## 5.4.6 How to Complete an E-mail

*Prerequisites*

- You have finished processing the e-mail.

*Step by Step*

*1)* Select the check box **This e-mail is completed** in the screen pop of the e-mail.

*2)* Click **Close**.

## 5.4.7 How to Flag a Fax for Follow-Up

*Prerequisites*

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

*Step by Step*

*1)* Click on **Reschedule** in the screen pop of the fax.

*2)* Select the desired **Date** and the desired **Time** and click on **OK**.

*3)* Click **Close**.

## 5.4.8 How to Flag an E-mail for Follow-Up

*Prerequisites*

- You have accepted the e-mail, but not finished processing it as yet.

*Step by Step*

*1)* Click in the e-mail screen pop on **Reschedule**.

*2)* Select the desired **Date** and the desired **Time** and click on **OK**.

*3)* Click **Close**.

## 5.4.9 How to Display the History of the Current Fax Sender

*Step by Step*

› Click in the **Inbound Fax** screen pop on **History**.

## 5.4.10 How to Display the History of the Current E-mail Sender

*Step by Step*

> › Click in the **Received Email** screen pop on **History**.

## 5.4.11 How Specify a Wrapup Reason for a Fax

*Prerequisites*

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

*Step by Step*

1) Click in the **Inbound Fax** screen pop on **Wrap up**.

2) Select one of the following options:

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

3) Click **OK**.

## 5.4.12 How to Specify a Wrapup Reason for an E-mail

*Prerequisites*

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

*Step by Step*

1) Click in the **Received Email** screen pop on **Wrap up**.

2) Select one of the following options:

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

3) Click **OK**.

## 5.5 Wrapup time

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

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

## 5.5.1 How to Extend the Wrapup Time

*Step by Step*

› Click on **Wrap up** in the tool bar.

---

**INFO:** If required, you can repeat the step to obtain additional wrapup time.

---

The wrapup time set for you in this queue is restarted.

## 5.5.2 How to End the Wrapup Time

*Step by Step*

› Click on **Available** in the tool bar.

# 5.6 Agent Callback

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

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

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

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

## 5.6.1 How to Execute a Callback

*Prerequisites*

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

*Step by Step*

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

## 5.6.2 How to Close a Callback

*Prerequisites*

- You have called back and reached the caller.

*Step by Step*

1) Click on **Hang Up** in the screen pop of the call.

2) If relevant, enter a wrapup reason; see *How to Specify a Wrapup Reason*.

3) Select the check box **This call is completed**.

4) Click **Close**.

## 5.6.3 How to Reschedule a Callback

*Prerequisites*

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

*Step by Step*

1) Click on **Hang Up** in the screen pop of the call.

2) Click **Reschedule**.

3) Select the desired **Date** and the desired **Time** and click on **OK**.

4) Click **Close**.

# 5.7 Recording Calls and Requesting Assistance

You can optionally record calls and also request assistance from an agent with the Supervisor or Administrator authorization level through silent monitoring or an override if required.

### Recording a Call

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

### Assistance

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

## 5.7.1 How to Record Calls as an Agent with the Agent Authorization Level

*Prerequisites*

- Live recording is enabled in the communication system.
- You have accepted a call.

*Step by Step*

1) Select one of the following options:
   - Click on **Record** in the screen pop of the incoming myAgent call.
   - Click on **Record** in the Telephony area of the myAgent main window.

2) If you want to stop the recording before the call ends, select one of the following options:
   - Click on **Stop** in the screen pop of the incoming myAgent call.
   - Click on **Stop** in the Telephony area of the myAgent main window.

**Related Topics**

## 5.7.2 How to Request Assistance from Agents with the Supervisor or Administrator Authorization Level

*Prerequisites*

• You have accepted a call.

*Step by Step*

**1)** Click on **Assistance** in the **toolbar**.

**2)** In the **Request Assistance** window, click on **Request will time out after …** and then on an entry that matches the urgency of your request.

This indicates that an agent with the Supervisor or Administrator authorization level should respond to your request for assistance within the selected time period.

**3)** Click **Monitor This Call** and select one of the following options for your call:

**a)** If you want assistance via Instant Messaging, click on **Text Assistance Requested**.

**b)** If you want assistance through an override by an agent with Supervisor or Administrator authorization level, click on **Intrude On Call**.

**c)** If you want assistance through silent monitoring by an agent with Supervisor or Administrator authorization level, click on **Monitor This Call**.

**4)** Enter your reason for the request in the input field for the instant message and then click **OK**.

---

*INFO:* If you want to terminate your request for assistance prematurely, click on **Stop** followed by **Close**.

If your request for assistance is not accepted within the selected time period, you can initiate a new request by clicking on **Request**.

---

**5)** After you have received the message `... has accepted your request for assistance`, you can exchange further instant messages with the Supervisor or Administrator by entering your instant message in the bottom field of the window and clicking **Send**.

# 5.8 Call Functions

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

You can usually perform call functions in the myAgent Inbound Call screen pop as well as the Telephony area of the myAgent main window.

**Placing a Call on Hold**

The party placed on hold hears Music On Hold or an announcement until you resume the call.

**Transferring a Call**

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

- Blind transfer (also called an unscreened transfer):
  You can transfer the call without an answer from the subscriber at the destination of the transfer.

- Supervised transfer (consultation transfer):
  You have the following options:
  - The subscriber at the transfer destination answers and accepts the call.
  - In the window with the prompt: `Does the other party wish to accept this call?`, click OK.

**Transferring a Call to a Queue or Agent**

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

**Picking up a Call**

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

**Related Topics**

- User Interface Elements
- User Interface Elements
- Call Processing
- Caller list

# 5.8.1 How to Initiate a Call Manually

*Step by Step*

*1)* Select one of the following options:

- Enter the phone number in dialable format or in canonical format in the drop-down list for phone numbers.

- Enter the first few letters of a name (at least 3 characters) in the drop-down list for phone numbers. All names starting with the entered letters are displayed in a list. Select the desired name.

- Select a phone number or a name from the drop-down list for phone numbers.

*2)* Click on **Dial** or press the `Enter` key.

**Related Topics**
- Call Number Formats

## 5.8.2 How to Make a Call from the Caller List

*Prerequisites*

- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

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

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

**Related Topics**
- How to Display the Caller List

## 5.8.3 How to Make a Call from the Internal Directory

*Step by Step*

*1)* Click on **Internal Directory**.

*2)* Select one of the following options:

- Double-click in the relevant directory entry on the desired station number.

- Click in the context menu of the relevant directory entry on the desired station number.

## 5.8.4 How to Make a Call with an Attendant Button

*Prerequisites*

- The Attendant Buttons are displayed; see *How to Display Attendant Buttons*.

*Step by Step*

›   Click on the relevant Attendant button.

**Related Topics**
•   Attendant Buttons

## 5.8.5  How to Place a Call on Hold

*Step by Step*

*1)*  Select one of the following options:

•   Click on **Hold** in the screen pop of the incoming myAgent call.

•   Click on **Hold** in the Telephony area of the myAgent main window.

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

•   Click on **Reconnect** in the screen pop of the incoming myAgent call.

•   Click on **Reconnect** in the Telephony area of the myAgent main window.

## 5.8.6  How to Configure the Transfer Method

*Step by Step*

*1)*  Click **Setup**.

*2)*  Click on **My Preferences > Miscellaneous**.

*3)*  Select one of the following options in the **Transfer Method** drop-down list:

•   If you want to use a blind (i.e., unscreened) transfer, select **Blind Transfer**.

•   If you want to use a consultation (i.e., screened) transfer, select **Consultation Transfer**.

*4)*  Click **OK**.

## 5.8.7  How to Transfer a Call

*Prerequisites*

•   You have accepted a call.

*Step by Step*

*1)*  Select one of the following options:

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

- Click on **Transfer** in the Telephony area of the myAgent main window.

*2)* In the screen pop, click **Transfer** on the **Users** tab.

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

*4)* Click on the desired agent and then on **Transfer**.

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

*6)* Click **Close**.

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

## 5.8.8 How to Transfer a Call to a Queue

*Prerequisites*

- You have accepted a call.

*Step by Step*

*1)* Select one of the following options:
- Click on **Transfer** in the screen pop of the incoming myAgent call.
- Click on **Transfer** in the Telephony area of the myAgent main window.

*2)* In the screen pop, click **Transfer** on the **Queues** tab.

*3)* Click on the desired queue and then on **Transfer**.

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

*5)* Click **Close**.

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

## 5.8.9 How to Transfer a Call to a Subscriber

*Prerequisites*

- You have accepted a call.

*Step by Step*

*1)* Select one of the following options:
- Click on **Transfer** in the screen pop of the incoming myAgent call.
- Click on **Transfer** in the Telephony area of the myAgent main window.

*2)* Select one of the following options in the **Transfer** screen pop:

- Click on the **Users** tab. Clear the **Display only agents** check box. Click on the desired station and then on **Transfer**.

- Enter the call number of the desired subscriber in the **Destination** field and then click **Transfer**.

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

*4)* Click **Close**.

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

## 5.8.10  How to Transfer a Call with an Attendant Button

*Prerequisites*

- You have accepted a call.

- The Attendant Buttons are displayed; see How to Display Attendant Buttons.

*Step by Step*

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

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

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

**Related Topics**
- Attendant Buttons

## 5.8.11  How to Pick up a Call for an Agent

*Step by Step*

*1)* Click on **Internal directory** in the tool bar.

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

*3)* Click on **Call Pickup** in the context menu of the agent for whom the call is signaled.

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

## 5.8.12 How to Accept a Call with an Attendant Button

*Prerequisites*

- The Attendant Buttons are displayed; see How to Display Attendant Buttons.
- The call is signaled at an agent for whom you have assigned an Attendant button.

*Step by Step*

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

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

**Related Topics**

- Attendant Buttons

## 5.9 Caller list

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

For each call, fax and e-mail, the caller list contains the following information:

- Type of call (symbol)

| Symbol | Type of call |
|:---:|:---|
|  | Inbound call |
|  | Callback |
|  | Recorded call |
|  | Fax |
|  | E-mail |

- **Call ID**
  Starts with 1 and is incremented by 1 for each new call, fax and e-mail.
- **Date / Time**

- **Queue**
- **Agent / State** (call number of agent / status of call, fax or e-mail, e.g., abandoned call)
- **Q-Time**
- **Talk**
- **Pickup**
- **Phone Number** of the caller or fax number/e-mail address of the sender
- **Title** of the caller or sender
- **Last Name** of the caller or sender
- **First Name** of the caller or sender
- **Company Name** of the caller or sender
- **Customer ID**
- **Call Complete**
- **Scheduled**

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

- Type of call (symbol)
- **Call ID**
- **Date / Time**
- **Queue**
- **Agent / State** (call number of agent / status of call, fax or e-mail, e.g., abandoned call)
- The **Phone Number** of the caller

For each fax and e-mail in the caller list, there is also a call history with the following information on the previous faxes and e-mails of the same sender:

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

**Related Topics**

- Call Functions

## 5.9.1 How to Display the Caller List

*Step by Step*

1) Click on **Caller list** in the tool bar.

2) Select the desired time period in the **Start Date**, **Start Time**, **End Date** and **End Time** drop-down lists.

3) Select the desired queue or **All** in the **Queue** drop-down list.

4) Select the desired agent or **All** in the **Agent** drop-down list.

5) In the **Group By** drop-down list, select whether the entries should be grouped, and if so, by which criterion.

6) Select one of the following options for inbound calls:
   - If you want to display your inbound calls, select the **Inbound Calls** check box.
   - If you do not want to display your inbound calls, clear the **Inbound Calls** check box.

7) Select one of the following options for e-mails:
   - If you want to display e-mails, select the **Email Calls** check box.
   - If you do not want to display any e-mails, clear the **Email Calls** check box.

8) Select one of the following options for callback faxes:
   - If you want to display faxes, select the **Fax Calls** check box.
   - If you do not want to display faxes, clear the **Fax Calls** check box.

9) Select one of the following options for callback calls:
   - If you want to display your callback calls, select the **Callback Calls** check box.
   - If you do not want to display your callback calls, clear the **Callback Calls** check box.

10) Select one of the following options for completed calls:
   - If you want to display your completed calls, select the **Completed** check box.
   - If you do not want to display your completed calls, clear the **Completed** check box.

11) Select one of the following options for incomplete calls:
   - If you want to display your incomplete calls, select the **Incomplete** check box.
   - If you do not want to display your incomplete calls, clear the **Incomplete** check box.

12) Select one of the following options for scheduled calls:
   - If you want to display only scheduled calls, select the **Scheduled Calls Only** check box.
   - If you do not want to display scheduled calls, clear the **Scheduled Calls Only** check box.

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

---

**Related Topics**
- How to Make a Call from the Caller List

## 5.9.2 How to Display the History of a Caller in the Caller List

*Prerequisites*

- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Double-click on the desired call in the caller list.

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

## 5.9.3 How to Display the History of a Fax Sender from the Caller List

*Prerequisites*

- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Double-click on the desired fax in the caller list.

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

## 5.9.4 How to Display the History of an E-mail Sender from the Caller List

*Prerequisites*

- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Double-click on the desired e-mail in the caller list.

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

## 5.9.5 How to Listen to the Recording of a Caller from the Caller List

*Prerequisites*

- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

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

2) Click on **Play** in the context menu of this call and select one of the following options:

   - If you want to listen to the recording through the speakers of your PC, click on **Play through speakers**.

- If you want to listen to the recording through the handset of your telephone, click on **Play through phone**.

---

**Related Topics**

- How to Record Calls as an Agent with the Agent Authorization Level
- Recording Calls as an Agent with the Supervisor or Administrator Authorization Level

## 5.10 Break

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

The available types of breaks are defined in the WBM by an agent with the Supervisor or Administrator authorization level.

### 5.10.1 How to Start a Break

*Step by Step*

1) Click on **Break** in the tool bar.
2) Select the desired type of break in the **Select break type** drop-down list.
3) Enter the desired duration of the break in minutes in the **Duration** field.
4) Click **OK**.

*Next steps*

End the break in myAgent before or when the break time expires.

### 5.10.2 How to End a Break

*Step by Step*

› Click on **Available** in the tool bar.

## 5.11 Displaying Queue Details

The **wallboard** contains a table with statistical information on queues in real time for the current 24-hour period. The font size used for the display can be set.

As an agent with the Agent authorization level, you can see every queue to which you are currently assigned. As an agent with the authorization level of a

Supervisor or Administrator, you can see all queues as well as their total values. The following values are displayed:

- **Calls Queuing**
  Number der calls, faxes and e-mails

- **Agents Logged In**
  Number of logged in agents

- **Longest Call Queuing**
  Duration of ongoing wait time in seconds for the oldest call, fax or e-mail

- **Longest Time in Idle State**
  Duration of time passed in seconds since receiving the last call, fax or e-mail

- **Calls Answered Today**
  Total of answered calls and received faxes and e-mails today

- **Abandoned Calls Today**
  Total of abandoned calls and e-mails today

- **Total Calls**
  Total of answered calls, received faxes and e-mails, and abandoned calls and e-mails (not including the currently queued calls, faxes and e-mails).

## 5.11.1 How to Display Queue Details (Wallboard)

*Step by Step*

1) Click in the display area of the myAgent main window and select **Wallboard**.

2) If you want to change the font size, select one of the following options:

   - To increase the font size, click on the plus symbol at the top right.

   - To decrease the font size, click on the minus symbol at the top right.

## 5.12 Grade of Service

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

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

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

## 5.12.1  How to Display the Grade of Service Graph

*Step by Step*

> › Click in the display area of the myAgent main window and select **Grade Of Service**.

## 5.13  Average Times

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

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

• **Average time in queue** (seconds)
  Updated on completion of every new inbound call and every new inbound fax and e-mail received.

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

## 5.13.1  How to Display the Average Times Graph

*Step by Step*

> › Click in the display area of the myAgent main window and select **Average Times**.

# 6 Functions for Agents with the Supervisor or Administrator Authorization Level

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

## 6.1 Agent Assignment (Binding)

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

**Agent Assignment (Binding)**

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

- **Primary Agent** or **Overflow Agent**
  Calls, faxes and e-mails are distributed uniformly to primary agents An overflow agent, by contrast, receives a call, fax or e-mail only when a specified number or specified waiting time for them is exceeded.

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

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

- **Wrap up**
  Duration of the default wrapup time in seconds. The wrapup time enables agents to finish any administrative tasks that may be required after completing a call or reading a fax or e-mail before they receive the next call, fax or e-mail.

- **Overflow after seconds in queue**
  Calls, faxes and e-mails that exceed this waiting period are received by an overflow agent.

- **Overflow after calls in queue**
  Calls, faxes and e-mails that exceed this maximum number are received by an overflow agent.

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

**Agent Status**

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

| Symbol | Status | Available for calls, faxes and e-mails |
|---|---|---|
| | Logged in, primary agent<br><br>The agent is logged into the queues and is a primary agent in this queue. Such agents can select and log in from any free phone to accept Contact Center calls. | X |
| | Logged in, overflow agent<br><br>The agent is logged into the queues and is an overflow agent in this queue. Such agents can select and log in from any free phone to accept Contact Center calls. | X |
| | Logged out, primary agent<br><br>The agent is not logged into the queues. In order to be available for calls, faxes and e-mails, he or she must first log into the queues. | – |
| | Logged out, overflow agent<br><br>The agent is not logged into the queues. In order to be available for calls, faxes and e-mails, he or she must first log into the queues. | – |
| | Inbound call (before the phone rings) | – |
| | Phone is ringing | – |
| | Agent is calling | – |
| | Agent is on the phone | – |
| | Post-processing after a call, fax or e-mail<br><br>After completing a call or reading a fax or e-mail, the agent still has the associated screen pop open. In order to be available for calls, faxes and e-mails again, the agent must close the screen pop. | – |

| Symbol | Status | Available for calls, faxes and e-mails |
|--------|--------|----------------------------------------|
| | Overdue after call, fax or e-mail<br><br>After completing a call or reading a fax or e-mail, the agent has left the associated screen pop open for too long. In order to be available for calls, faxes and e-mails again, the agent must close the screen pop. | – |
| | Wrapup time, with indication or remaining time (in seconds)<br><br>On ending a call (fax or e-mail) and closing the associated screen pop, the agent is automatically in the default wrapup time. On completion of the wrapup time, the agent is automatically in placed the available state. The agent can optionally extend the wrapup time, more than once if needed. In order to be available for new calls, faxes and e-mails, he or she must first terminate the ongoing wrapup time or wait for it to expire. | – |
| | On a break, with indication of time of return<br><br>The agent specifies the type and scheduled duration at the start of the break. In order to be available for calls faxes and e-mails again, he or she must end the current break. | – |
| | Overdue after break<br><br>The agent has not completed his or her break although the scheduled break time has expired. In order to be available for calls faxes and e-mails again, he or she must end the current break. | – |
| | Not for permanently available agents:<br><br>Missed call, fax or e-mail<br><br>The agent has not accepted a call, fax or e-mail. The **Missed Call** screen pop is displayed with the message: `You have missed a call. To continue receiving calls, click the button below.` In order to be available for calls, faxes and e-mails again, the agent must close the **Missed Call** screen pop. | – |

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

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

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

> *INFO:* Whenever a logged in agent changes his or her presence status in myPortal for Desktop, myPortal for Outlook, myPortal for Mobile or myPortal for OpenStage, that agent is automatically logged out from the queue.

## 6.1.1 How to Customize the Display of the Agent Binding List

*Prerequisites*

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

*Step by Step*

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

2) Select the check boxes for the queues to be displayed in the agent binding list.

3) Clear the check boxes of the queues that are not to be displayed in the agent binding list.

## 6.1.2 How to Assign an Agent to a Queue

*Prerequisites*

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

*Step by Step*

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

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

Click on **Internal directory** in the tool bar.

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

Drag the relevant agent from the internal directory to the desired queue in the **Agent Binding List**.

• If you want to select the agent via the Attendant buttons, proceed as follows:

Click in the display area of the myAgent main window and select **Attendant Buttons**.

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

Then the window for the agent assignment of the desired queue is displayed.

2) Select one of the following options:

- If the agent is to receive calls, faxes and e-mails without regard to the load on the queue, activate the radio button **Primary Agent**.

- If the agent is to receive calls, faxes and e-mails only when the queue overflows, activate the radio button **Overflow Agent**.

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

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

*4)* Select one of the following options:

- If the agent is to be allowed to receive callbacks, activate the **Enable agent callback** check box.

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

*5)* Enter the automatic wrapup time in seconds for the agent in this queue in the **Wrap up** field.

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

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

*b)* Enter the maximum number of calls, faxes and e-mails in the **Overflow after calls in queue** field. Calls, faxes and e-mails that exceed this maximum number are received by an overflow agent.

*7)* Click **Save**.

---

**Related Topics**
- How to Edit an Agent Assignment
- How to Move an Agent to Another Queue
- How to Remove an Agent from the Queue

## 6.1.3 How to Edit an Agent Assignment

*Prerequisites*

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

*Step by Step*

*1)* Double click in the **Agent Binding List** on the relevant agent in the appropriate queue. The Agent Queue Binding window for this queue is displayed.

*2)* Select one of the following options:

- If the agent is to receive calls, faxes and e-mails without regard to the load on the queue, activate the radio button **Primary Agent**.

- If the agent is to receive calls, faxes and e-mails only when the queue overflows, activate the radio button **Overflow Agent**.

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

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

*4)* Select one of the following options:

- If the agent is to be allowed to make callbacks, activate the **Enable agent callback** check box.

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

*5)* Enter the automatic wrapup time in seconds for the agent in this queue in the **Wrap up** field.

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

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

*b)* Enter the maximum number of calls, faxes and e-mails in the **Overflow after calls in queue** field. Calls, faxes and e-mails that exceed this maximum number are received by an overflow agent.

*7)* Click **Save**.

---

**Related Topics**
- How to Assign an Agent to a Queue

## 6.1.4 How to Move an Agent to Another Queue

*Prerequisites*

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

*Step by Step*

*1)* Drag the agent in the **Agent Binding List** from the current queue to the desired new queue. The **Agent Queue Binding** window is then displayed.

*2)* Select one of the following options:

- If the agent is to receive calls, faxes and e-mails without regard to the load on the queue, activate the radio button **Primary Agent**.

- If the agent is to receive calls, faxes and e-mails only when the queue overflows, activate the radio button **Overflow Agent**.

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

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

*4)* Select one of the following options:

- If the agent is to be allowed to make callbacks, activate the **Enable agent callback** check box.

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

*5)* Enter the automatic wrapup time in seconds for the agent in this queue in the **Wrap up** field.

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

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

*b)* Enter the maximum number of calls, faxes and e-mails in the **Overflow after calls in queue** field. Calls, faxes and e-mails that exceed this maximum number are received by an overflow agent.

*7)* Click **Save**.

---

**Related Topics**
- How to Assign an Agent to a Queue

## 6.1.5 How to Remove an Agent from the Queue

*Prerequisites*

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

*Step by Step*

*1)* Click on the relevant agent in the **Agent Binding List**.

*2)* Click on **Remove** in the context menu of this agent.

---

**Related Topics**
- How to Assign an Agent to a Queue

## 6.1.6 How to Change the Status of an Agent

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The agent in question has started myAgent.

*Step by Step*

1) Click on the relevant agent in the **Agent Binding List**.

2) Select one of the following options in the context menu:
    - If you want to log in a logged out agent into a queue, click on **Log Into Queues**.
    - If you want to log out a logged in agent from a queue, click on **Log Out**.
    - If you want to make an unavailable agent (for example after a missed call) available again for calls, faxes and e-mails, click on **Available**.

## 6.2 Monitoring Calls and Requesting Assistance

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

### Recording a Call

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

### Silent Monitoring of a Call (Country Dependent)

You can listen in on a call unnoticed (called silent monitoring).

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

### Overriding a Call

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

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

**Position of a Call in a Queue**

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

**Assistance**

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

**Saving and Sending Faxes and E-mails**

Faxes can be saved in the PDF or TIFF file format and sent by e-mail.

E-mails can be saved in the EML file format and sent as EML files by e-mail.

# 6.2.1 Recording Calls as an Agent with the Supervisor or Administrator Authorization Level

*Prerequisites*

- Live recording is enabled in the communication system.

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

*Step by Step*

1) Click on the relevant call in the **List of Contact Center Calls**.

2) Click on **Record** in the context menu of this call.

3) If you want to stop the recording before the call ends, click on **Stop Rec.** in the context menu of this call.

**Related Topics**

- How to Listen to the Recording of a Caller from the Caller List

## 6.2.2 How to Save the Recording of a Call as a WAV File

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Click on the desired call in the **Caller list**.
2) Click on **Save As** in the context menu of this call.
3) Select the directory in which the file is to be stored.
4) Enter the desired name in the **File Name** field and click **Save**.

## 6.2.3 How to Send the Recording of a Call by E-mail

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Click on the desired call in the **Caller list**.
2) Click on **Send in Email** in the context menu of this call.
3) Enter the e-mail address of the desired recipient in the **Recipients** field.
4) Enter the desired text for **Subject** and Message.
5) Click **Send**.

   The recording of the call is sent as a WAV file in the attachment of the e-mail.

## 6.2.4 How to Save a Fax

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Click on the desired fax in the **Caller list**.
2) Click on **Save As** in the context menu of this fax message.
3) Select the directory in which the file is to be stored.
4) Enter the desired name in the **File Name** field and click **Save**.

## 6.2.5  How to Send a Fax by E-mail

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Click on the desired fax in the **Caller list**.
2) Click on **Send in Email** in the context menu of this fax message.
3) Enter the e-mail address of the desired recipient in the **Recipients** field.
4) Enter the desired text for **Subject** and Message.
5) Click on **Send**.

    The fax is sent as a PDF or TIFF file in the attachment of the e-mail.

## 6.2.6  How to Save an E-Mail as an EML File

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Double-click on the desired e-mail in the **Caller List**.
2) Click on **Save As** in the context menu of this e-mail.
3) Select the directory in which the file is to be stored.
4) Enter the desired name in the **File Name** field and click **Save**.

## 6.2.7  How to Send an E-mail by E-mail

*Prerequisites*

- You are an agent with the authorization level of a Supervisor or Administrator.
- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Double-click on the desired e-mail in the **Caller List**.
2) Click on **Send in Email** in the context menu of this e-mail.

*3)* Enter the e-mail address of the desired recipient in the **Recipients** field.

*4)* Enter the desired text for **Subject** and Message.

*5)* Click **Send**.

The e-mail is sent as an EML file in the attachment of the e-mail.

## 6.2.8  How to Monitor Calls (Country Dependent)

*Prerequisites*

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

*Step by Step*

*1)* Click on the relevant call in the **List of Contact Center Calls**.

*2)* Click on **Monitor This Call** in the context menu of this call.

## 6.2.9  How to Override a Call

*Prerequisites*

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

*Step by Step*

*1)* Click on the relevant call in the **List of Contact Center Calls**.

*2)* Click on **Intrude On Call** in the context menu of this call.

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

## 6.2.10  How to Change the Position of a Call in a Queue

*Prerequisites*

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

*Step by Step*

*1)* Click on the desired call in the **List of Contact Center Calls**.

*2)* Click on **Move to Top Position** in the context menu of this call.

## 6.2.11 How to Accept a Request for Assistance

*Prerequisites*

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

- The **Agent Assistance Requests** screen pop is displayed.

*Step by Step*

1) Click on the entry of the agent whose request you want to respond to.

> **INFO:** If you want to sort the agent list in alphanumeric ascending order, click on the title of the corresponding column. Click again to sort in descending order.

2) Select one of the following options:

- If you want to provide the assistance, click **Accept**.

> **INFO:** Depending on the type of assistance requested, you can override the agent's call (call intrusion), listen in on the call (silent monitoring) or exchange instant messages with the agent (Instant Messaging). Instant messages can also be exchanged with the agent after an override and during silent monitoring.

Entering your instant message in the bottom field of the window and click **Send**.

- If you do not want to provide any assistance, click **Reject**.

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

## 6.3 Monitoring Queues

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

**Monitoring the Number of Waiting Calls, Faxes and E-mails**

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

| Symbol | Status |
|---|---|
|  | Normal |
|  | Alarm for number of waiting calls, faxes and e-mails<br><br>The number of waiting calls, faxes and e-mails in this queue has exceeded the threshold value. For each queue, an alarm threshold value for the number of waiting calls can be configured in the WBM by an agent with the authorization level of a Supervisor or Administrator. |

**Monitoring the Waiting Time of Calls and E-mails**

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

**Alarm Message**

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

- myAgent always on top for alarms
- Alarm tone

## 6.3.1 How to Enable or Disable the Automatic myAgent Screen Pop for Alarms

*Prerequisites*

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

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > General Settings**.

3) Select one of the following options if the number of waiting calls, faxes and e-mails in a queue has exceeded the alarm threshold value:

    - If you want myAgent to appear automatically in the foreground for alarm conditions, select the check box **Screen pop myAgent when calls hit alarm condition**.

    - If you do not want myAgent to appear automatically in the foreground for alarm conditions, clear the check box **Screen pop myAgent when calls hit alarm condition**.

4) Click **OK**.

## 6.3.2 How to Activate or Deactivate the Warning Tone

*Prerequisites*

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

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > General Settings**.

3) Select one of the following options if the number of waiting calls, faxes and e-mails in a queue has exceeded the alarm threshold value:

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

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

4) Click **Save**.

## 6.4 Other Features

You can delete caller information in screen pops.

## 6.4.1 How to Delete Caller Information

*Prerequisites*

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

- The Caller list is displayed; see *How to Display the Caller List*.

*Step by Step*

1) Double-click on the desired call in the caller list.

2) Click on **Caller Information** in the screen pop.

3) Click on the desired item in the list of information and then on **Remove**.

# 7 Directories

Directories organize your contacts.

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

| Symbol | Directory | Make Call | Search by name | Change presence status | Send Instant Message |
|---|---|---|---|---|---|
|  | Internal Directory<br><br>Contains internal subscribers (contacts) with their Presence status (only system telephones) and their additional phone numbers. When a subscriber is absent, you can see the scheduled time of return in the **Return Time** column, provided that subscriber has allowed his or her Presence status to be visible to you. | X | X | X | X |
| – | External directory:<br><br>Contains contacts from a corporate directory and must be configured by an agent with the Supervisor or Administrator authorization level in the WBM. | X | X | – | – |
| – | External Offline Directory (LDAP):<br><br>Contains contacts from an offline corporate directory and must be configured by an agent with the Supervisor or Administrator authorization level in the WBM.<br><br>The external offline directory is only used for the search. | X | X | – | – |

**Search in directories**

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

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

**Contact Details in the Internal Directory**

The List view of contacts shows the following details next to the presence status: **Extension**, **Return Time**, **Last Name**, **First Name**, **Mobile Ph.**, **Assistant Ph.**,

**External 1**, **External 2**, **Home Ph.**, **Business Ph.**, **E-mail**, **Department**, **Site**. The width of all columns is variable.

### Sorting Contacts in the Internal Directory

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

### Zooming in on an Entry in the Internal Directory

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

### Copying contacts into the external directory

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

**Related Topics**

- Presence Status

## 7.1 How to Search in Directories

*Step by Step*

1) Click on **Search** in the tool bar.

2) If necessary, click on **Options** to display the Search options.

3) Select one of the following Search options:

- If you want to search for a full word, enable the **Match Full Word** check box.

- If you want to search for a part of a word, clear the **Match Full Word** check box.

4) Select which directories are to be included in the search by selecting or clearing the **Internal Directory**, **External Directory** and **External Offline Directory** check boxes as required.

5) Enter a search term in the search field and click **Search**.

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

6) To abort an ongoing search, click **Stop**.

## 7.2 How to Sort the Internal Directory

*Step by Step*

1) Click on **Internal directory** in the tool bar.

2) Click on one of the column titles of the internal directory, e.g., **Last Name**, to sort the contacts by this criterion in ascending alphanumeric order.

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

4) To jump to the first entry in the sorted column that begins with a specific character, click on any contact in the directory and enter the desired character.

# 8 Instant Messaging

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

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

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

For example, for the subscriber John Doe:

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

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

## 8.1 How to Send an Instant Message

*Prerequisites*

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

*Step by Step*

1) Click on **Internal directory** in the tool bar.

2) Click on the desired station in the internal directory.

3) Click on **Send Instant Message** in the context menu.

4) Enter your instant message.

5) Press the return key.

# 9 Attendant Buttons

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

You can set up multiple tabs for Attendant buttons, e.g., for different departments. Ninety Attendant buttons are available on a tab. If no name exists, the phone number is displayed. The Attendant buttons on a tab are sorted by Last Name in alphanumeric ascending order by default. Stations without names are sorted after the stations for which a name can be displayed.

**Related Topics**

- User Interface Elements
- User Interface Elements
- How to Make a Call with an Attendant Button
- How to Transfer a Call with an Attendant Button
- How to Accept a Call with an Attendant Button
- Presence Status

## 9.1 How to Display Attendant Buttons

*Step by Step*

› Click in the display area of the myAgent main window and select **Attendant Buttons**.

## 9.2 How to Sort Attendant Buttons

*Prerequisites*

- The Attendant Buttons are displayed; see *How to Display Attendant Buttons*.

*Step by Step*

1) Click on the desired tab with Attendant buttons.

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

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

## 9.3 How to Automatically Assign Attendant Buttons

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Attendant Buttons**.

3) Click on the **Group Setup** tab.

4) Click on **Auto-Populate Attendant Groups**.

5) Select one of the following options in the **Create groups based on** drop-down list.

   • If you want a tab to be created for every Department, click **Department**.

   • If you want a tab to be created for every Site, click **Site**.

6) Select one of the following options in the **Sort groups by** drop-down list:

   • **First Name**

   • **Last Name**

7) Select one of the following options:

   • If you want to retain your existing tabs in addition to those created automatically, click on the radio button **Append the new groups to the end of my existing groups** and then click **OK**.

   • If you want to replace your existing tabs by to those created automatically, click on the radio button **Re-create my group structure** and then on **OK**.

8) Click **OK**.

## 9.4 How to Assign a Subscriber to an Attendant Button

*Prerequisites*

   • The Attendant Buttons are displayed; see *How to Display Attendant Buttons*.

*Step by Step*

1) Click on the desired tab with Attendant buttons.

2) Click on **Internal directory** in the tool bar.

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

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

## 9.5 How to Remove a Subscriber from an Attendant Button

*Prerequisites*

- The Attendant Buttons are displayed; see *How to Display Attendant Buttons*.

*Step by Step*

1) Click on the desired tab with Attendant buttons.

2) Select **Remove** in the context menu of the appropriate Attendant button.

## 9.6 How to Add a Tab with Attendant Buttons

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Attendant Buttons**.

3) Click **Add**.

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

5) Click **OK**.

## 9.7 How to Delete a Tab with Attendant Buttons

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Attendant Buttons**.

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

4) Click **Remove**.

5) Click **OK**.

## 9.8 How to Change the Order of Tabs for Attendant Buttons

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Attendant Buttons**.

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

4) Select one of the following options:

- Click **Move Up**.

- Click **Move Down**.

*5)* Repeat steps 3 through 4 as required.

*6)* Click **OK**.

# 10 Reports

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

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

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

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

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

**Data Protection**

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

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

**Report Templates**

The following report templates are available:

| Report template | Description |
|---|---|
| **Abandoned Calls Statistics** | Table with number and percentage of calls abandoned by callers before reaching an agent, per queue<br><br>Q- times for callers at 30-second intervals per queue<br><br>Total values for all calls, faxes and e-mails |
| **Abandoned Calls Per Hour** | Bar chart and table with number and percentage of calls abandoned by callers before reaching an agent, per hour<br><br>Optionally only during configured business hours |
| **Percentage of calls received by agents (All Queues)** | Bar chart and table with number and percentage of answered calls, faxes and e-mails and percentage of talk/reading time per agent<br><br>Total values for all agents |
| **Percentage of calls received by agents** | Bar chart and table with number and percentage of answered calls, faxes and e-mails and percentage of talk/reading time per agent for the selected queue<br><br>Total values for all the agents for the selected queue |
| **Agent Performance Details (Daily Breakdown)** | Table with start time, pickup time, talk/reading time and GOS (Grade of Service) for every call, fax and e-mail for the selected agent<br><br>Total values per queue and total values o    f all queues |
| **Queue Load Per Agent** | Bar chart and table with number and percentage of calls, faxes and e-mails per queue for the selected agent<br><br>Total values for all queues |
| **Average Grade of Service by Agent** | Line chart with average Grade of Service for the selected agent at hourly intervals. |
| **Average Grade Of Service by Agent - Daily** | Line chart with average Grade of Service for the selected agent at hourly intervals on a daily basis. |
| **Average Grade Of Service by Queue** | Line chart with average Grade of Service for the selected queue at hourly intervals. |
| **Average Grade Of Service by Queue - Daily** | Line chart with average Grade of Service for the selected queue at hourly intervals on a daily basis. |
| **Missed Calls Report** | Table with Time Of Call, Call ID, Phone Number, Customer Name and Company Name of missed calls, faxes and e-mails for selected queues on a daily basis<br><br>Optionally only during configured business hours |
| **Missed Calls Per Queue** | Pie chart and table with number and percentage of missed calls, faxes and e-mails per queue<br><br>Total values for all queues<br><br>Optionally only during configured business hours |

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

| Report template | Description |
|---|---|
| **Queue Summary Details** | Bar chart and table with number of answered and aborted calls, faxes and e-mails, number of remaining calls, maximum, minimum and average Q-time for answered and abandoned calls, faxes and e-mails and maximum, minimum and average talk/reading time for answered calls, faxes and e-mails for the selected queue<br><br>Average Grade of Service for the selected queue<br><br>*INFO*: Remaining calls are calls that were, e.g., handled by a non-agent. |
| **Contact Center Summary (All Call Types)** | Table with number of calls, faxes and e-mails, average pickup time, average talk/reading time and average Q-time, number of callbacks and total Q-time, per queue<br><br>Total values for all queues<br><br>Optionally only during configured business hours |
| **Contact Center Summary (Answered Calls)** | Table with number of answered calls, faxes and e-mails, average pickup time, average talk/reading time and average Q-time per queue<br><br>Total values for all queues<br><br>Optionally only during configured business hours |
| **Call List Open** | Table with number of open calls, faxes and e-mails per queue<br><br>Total values for all queues |
| **Wrap up Code Usage (All Queues)** | Pie chart and table with number and percentage usage, average talk/reading time, total talk/reading time and average Q-time per wrapup reason<br><br>Optionally only for the configured business hours |
| **Wrap up Code Usage** | Bar chart and table with number and percentage usage, average talk/reading time, total talk/reading time and average Q-time per wrapup reason for the selected queue.<br><br>Optionally only for the configured business hours |
| **Answered Calls (Wrap up)** | Table with call ID, time of call, agent, wrapup reason, phone number/fax number/e-mail address and customer name/company name for each answered call, fax and e-mail for the selected queues on a daily basis<br><br>Optionally only for the configured business hours |

## 10.1 How to Create Reports

*Prerequisites*

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

*Step by Step*

1) Click in the tool bar on **Reports** and then on the desired report template.

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

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

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

   • If you want to restrict the reporting period to business hours, select the **Business Hours Only** check box.

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

4) Click **OK**.

*Next steps*

Save or print the PDF file if required.

# 11 Presence Status

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

As an agent with the authorization level of a Supervisor or Administrator, you can change the presence status of other subscribers via the internal directory or the Attendant buttons. For every change in the presence status (except for **Office**), you also define the scheduled time of your return to the **Office** status.

You can assign the following Presence statuses to a subscriber:

| Symbol | Presence status | Availability |
|---|---|---|
|  | **Office** | Available at the normal workplace |
|  | **Meeting** | Absent |
|  | **Sick** | Absent |
|  | **Break** | Absent |
|  | **Gone Out** | Absent |
|  | **Vacation** | Absent |
|  | **Lunch** | Absent |
|  | **Gone Home** | Absent |

In order for an agent to change the presence status of other subscribers, he or she must be configured as an attendant in the communication system.

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

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

> *INFO:* For subscribers without system telephones (e.g., those with ISDN phones or analog phones), the internal directory and Attendant buttons do not show any presence status, but only the connection status.

**Related Topics**

- Directories
- Attendant Buttons

## 11.1 How to Change the Office Presence Status of a Subscriber

*Prerequisites*

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

*Step by Step*

**1)** Select one of the following options for selecting the subscriber:

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

  Click on **Internal directory** in the tool bar.

  Click on the relevant station in the internal directory.

  Select the relevant presence status under **Change Status** in the context menu.

- If you want to select the subscriber via the Attendant buttons, proceed as follows:

  Click in the display area of the myAgent main window and select **Attendant Buttons**.

  Select the relevant presence status under **Change Status** in the context menu of the Attendant button for the desired subscriber.

**2)** If desired, enter an info text for the presence status of the subscriber in the input field.

**3)** Select one of the following options to specify the time of return:

- Click on one the four buttons with the desired duration of the absence period.

- Select the time of return for the subscriber via the choice lists.

**4)** Click **OK**.

## 11.2  How to Change the Presence Status of a Subscriber to Office

*Prerequisites*

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

*Step by Step*

› Select one of the following options for selecting the subscriber:

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

  Click on **Internal directory** in the tool bar.

  Click on the relevant station in the internal directory.

  Select the Presence status **in the Office** under **Change Status** in the context menu.

- If you want to select the subscriber via the Attendant buttons, proceed as follows:

  Click in the display area of the myAgent main window and select **Attendant Buttons**.

  Select the Presence status **in the Office** under **Change Status** in the context menu of the Attendant button for the desired subscriber.

# 12 Configuration

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

**Defining Additional Phone Numbers**

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

**Specify your e-mail address**

You can enter your e-mail address in order to be reachable by e-mail.

In order to use e-mail, the administrator of your communication system will need to have configured the sending of e-mails.

**Specifying the XMPP ID**

You can enter your XMPP ID in order to be reachable via XMPP. XMPP (Extensible Messaging and Presence Protocol) is an Internet standard for XML routing and is used mainly for instant messaging.

XMPP can only be used if the administrator of your communication system has enabled XMPP.

**Providing your own Picture**

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

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

**Customizing the Appearance**

You can customize the appearance of myAgent via the following configuration options:

- Customize the display for queues
  As an agent with the authorization level of a Supervisor or Administrator, you can select which queues should and should not be displayed in the agent binding list.
- Configure the Screen Pop
  You can customize the screen pop to only show the areas you really want to display.
  The following areas can be configured individually:
  – **Display Call Control** (1)
    Drop-down list for call numbers/input field for phone numbers to be dialed and names to be searched
    Symbols for **Answer**, **Hang Up**, **Dial**, **Transfer**, etc.

- **Display Call Overview** (2)
  Display of **Queue**, **Call ID**, **Phone Number**, **Callback Number**
- **Display Contact Details** (3)
  Display of **Customer ID**, **Title**, **First Name**, **Last Name**, **Company**
- **Display History** (3)
  Display of detailed information about all previous calls from the same caller
- **Display Contact Notes** (4)
  Display of information about the current caller
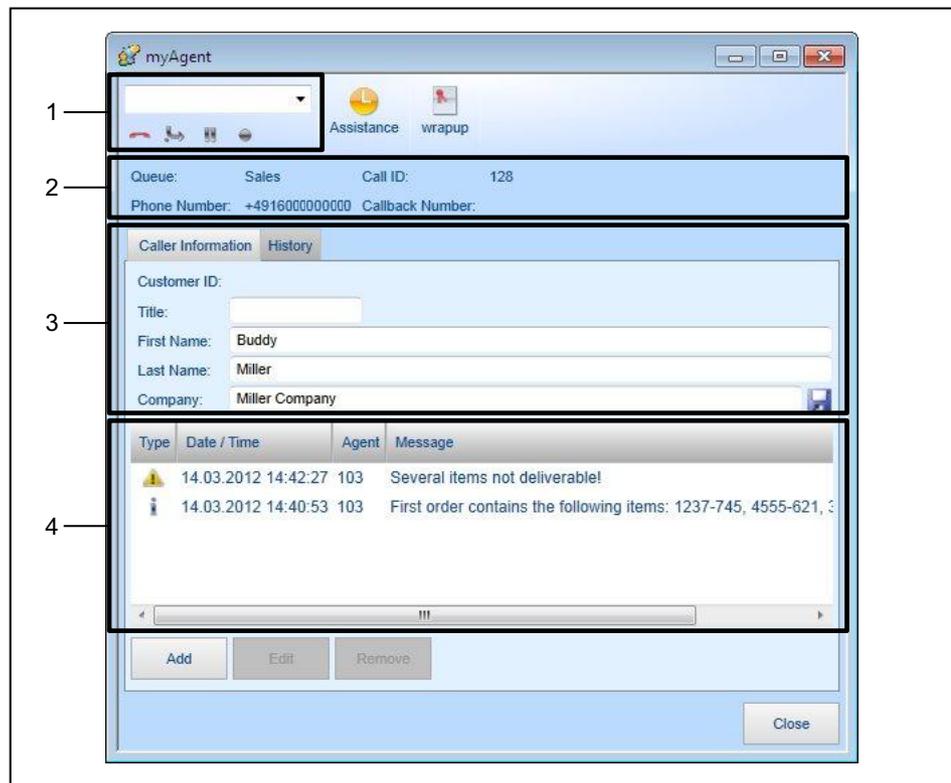


The **Assistance** and **Wrapup** symbols are always displayed, regardless of the setting.

- Display screen pops on accepting a call
  You can select whether to open a screen pop on accepting an incoming call. You can also determine whether the input focus should be on the screen pop.
- Minimize myAgent on completing a call
  You can select whether myAgent should be minimized on completion of a call.
- Display the myAgent main window on completing a call
  You can select whether the myAgent main window should be automatically displayed in the foreground on completion of a call.
- Display the position of the screen pop for missed calls
  You can select whether to display the screen pop for missed calls, faxes or e-mails via the task bar on the right or in the middle of the screen.

**Hotkeys**

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

- **Global Hot Keys**

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

  - **Answer/Disconnect call**
  - **Transfer Call**
  - **Display ScreenPop**

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

- **Hotkeys for Applications**

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

  - **Help** (bring up the online help)
  - **Setup**
  - **Internal directory**
  - **Caller list**
  - **Search**
  - **Answer/Disconnect call**
  - **Hold / Unhold**
  - **Transfer**
  - **Reschedule**
  - **Dial**
  - **Record**

**WBM**

The WBM is a web-based administration application that can be typically used to configure queues, the screen pop for calls, types of breaks and the external offline directory, for example. Agents with the Supervisor or Administrator authorization level can start the WBM directly from myAgent.

After 30 minutes of inaction, an automatic logout from the WBM occurs.

## 12.1 How to Change the Password

> **INFO:** You can also change the password via the Phone menu of the voicemail box.

*Step by Step*

1) Click on **Setup** in the tool bar.

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

*3)* Click on **Change Password**.

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

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

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

> *INFO:* The password applies to myAgent, myReports, myAttendant, myPortal for Desktop, myPortal for Outlook and Fax Printer as well as phone access to your voicemail box.

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

## 12.2 How to Change the Language of the User Interface

*Step by Step*

*1)* Click on **Setup** in the tool bar.

*2)* Click on **My Preferences > Appearance**.

*3)* Select the desired language in the **Language** drop-down list.

*4)* Click **OK**.

*Next steps*

Close and restart myAgent.

## 12.3 How to Define an Additional Phone Number

*Step by Step*

*1)* Click on **Setup** in the tool bar.

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

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

*4)* Select one of the following options:

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

• If you want to see **Mobile Number**, **External Number 1**, **External Number 2** or **Private Number** displayed in the internal directory, select the **Visibility** check box next to the phone number.

*5)* Click **OK**.

## 12.4 How to Specify your E-Mail Address

*Prerequisites*

• The administrator of your communication system has configured the sending of e-mails.

*Step by Step*

*1)* Click on **Setup** in the tool bar.

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

*3)* Enter your e-mail address in the **E-mail** field.

*4)* Click **OK**.

## 12.5 How to Define an XMPP ID

*Prerequisites*

• The administrator of your communication system has enabled XMPP.

*Step by Step*

*1)* Click on **Setup** in the tool bar.

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

*3)* Enter your XMPP alias in the **XMPP-ID** field. Your XMPP alias is the left portion (e.g., `john.public`) of your complete XMPP-ID (e.g., `john.public@oso.example-domain.com`), without the domain name. The XMPP alias must be unique within the domain.

> *INFO:* You should provide other XMPP communication partners with your full XMPP ID (e.g., `xmpp:john.public@oso.example-domain.com`), i.e., including the domain name. If required, ask the administrator of your communication system for the domain name.

*4)* Click **OK**.

## 12.6 How to Provide your own Picture

*Prerequisites*

- You have an image file with your picture in one of the following file formats: BMP, GIF, JPG.

*Step by Step*

1) Click on **Setup** in the tool bar.
2) Click on **Personal Details > My Picture**.
3) Click **Select**.
4) Select the desired file and click **Open**.
5) Click **OK**.

## 12.7 How to Delete your own Picture

*Step by Step*

1) Click on **Setup** in the tool bar.
2) Click on **Personal Details > My Picture**.
3) Click **Delete**.
4) Click **OK**.

## 12.8 How to Customize the Display of Queues

*Prerequisites*

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

*Step by Step*

1) Click **Setup**.
2) Click on **My Preferences > Queue Visibility**.
3) Select the check boxes for the queues to be displayed in the agent binding list.
4) Clear the check boxes of the queues that are not to be displayed in the agent binding list.
5) Click **OK**.

## 12.9 How to Configure Screen Pops

*Step by Step*

1) Click **Setup**.

2) Click on **My Preferences > Popup Configuration**.

3) Select one of the following options for the display of the Call Control area (symbols for **Answer**, **Hang Up**, **Dial**, **Transfer**, etc.):

   - If you want the Call Control area to be displayed in the screen pop, select the **Display Call Control** check box.

   - If you do not want the Call Control area to be displayed in the screen pop, clear the **Display Call Control** check box.

4) Select one of the following options for the display of the Call Overview area (**Queue**, **Call ID**, **Call No**, **Callback Number**):

   - If you want the Call Overview area to be displayed in the screen pop, select the **Display Call Overview** check box.

   - If you do not want the Call Overview area to be displayed in the screen pop, clear the **Display Call Overview** check box.

5) Select one of the following options for the display of the Contact Details area (**Customer ID**, **Title**, **First Name**, **Last Name**, **Company**):

   - If you want the Contact Details area to be displayed in the screen pop, select the **Display Contact Details** check box.

   - If you do not want the Contact Details area to be displayed in the screen pop, clear the **Display Contact Details** check box.

6) Select one of the following options for the display of the History area (details of all previous calls of the same caller):

   - If you want the History area to be displayed in the screen pop, select the **Display History** check box.

   - If you do not want the History area to be displayed in the screen pop, clear the **Display History** check box.

7) Select one of the following options for the display of the Contact Notes area (information on the current caller):

   - If you want the Contact Notes area to be displayed in the screen pop, select the **Display Contact Notes** check box.

   - If you do not want the Contact Notes area to be displayed in the screen pop, clear the **Display Contact Notes** check box.

8) Click **OK**.

## 12.10 How to Enable or Disable Screen Pops to Accept a Call

*Step by Step*

*1)* Click **Setup**.

*2)* Click on **My Preferences > Notifications**.

*3)* Select one of the following options for enabling the screen pop:

- If you want a screen pop to open when accepting an incoming call, select the **Screen pop on answer** check box.

- If you do not want any screen pop to open when accepting an incoming call, clear the **Screen pop on answer** check box.

*4)* Select one of the following options for the input focus:

- If you want the input focus to be in the screen pop, select the check box **Screen pop takes focus when displayed**.

- If you do not want the input focus to be in the screen pop, clear the check box **Screen pop takes focus when displayed**.

*5)* Click **OK**.

## 12.11 How to Enable or Disable the Minimizing of myAgent on Ending a Call

*Step by Step*

*1)* Click **Setup**.

*2)* Click on **My Preferences > Notifications**.

*3)* Select one of the following options:

- If you want myAgent to be minimized on completing a call, select the check box **Minimize on hangup**.

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

*4)* Click **OK**.

## 12.12 How to Enable or Disable the Display of the myAgent Main Window on Ending a Call

*Step by Step*

*1)* Click **Setup**.

*2)* Click on **My Preferences > Notifications**.

*3)* Select one of the following options:

- If you want the myAgent main window to appear automatically in the foreground on completing a call, select the check box **Pop up application on call termination**.

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

*4)* Click **OK**.

## 12.13 How to Set the Display Position of the Screen Pop for Missed Calls

> *INFO:* The screen pop for a missed call, missed fax or missed e-mail is not displayed for permanently available agents.

*Step by Step*

*1)* Click **Setup**.

*2)* Click on **My Preferences > Miscellaneous**.

*3)* Select one of the following options:

- If you want to display the screen pop for missed calls, faxes or e-mails via the task bar on the right, select the check box **Display missed call notification via tray pop**.

- If you want to display the screen pop for missed calls, faxes or e-mails in the center of the screen, clear the check box **Display missed call notification via tray pop**.

*4)* Click **OK**.

## 12.14 How to Enable or Disable Dialing by Entering a Name

*Step by Step*

*1)* Click on **Setup**.

*2)* Click on **My Preferences > Miscellaneous**.

*3)* Select one of the following options:

- If you want to enable dialing by entering a name, select the **Perform Live Search** check box.

- If you want to disable dialing by entering a name, clear the**Perform Live Search** check box.

*4)* Click on **OK**.

## 12.15 How to Activate or Deactivate a Global Hotkey

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Hot Keys** in the menu bar.

3) Select one of the following options:

   • If you want to activate a hotkey, click in the rectangular field next to the relevant function. Press the `Ctrl+Shift`, `Ctrl+Alt` or `Shift+Alt` key combination together with one of the function keys `F1-F12`. If the pressed key combination can be used for myAgent, this is displayed. Then select the **Activate** check box next to it.

   • If you want to deactivate a hotkey, clear the **Active** check box next to that key.

4) Click **OK**.

## 12.16 How to Configure a Hotkey for the Application

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Hot Keys** in the menu bar.

   The available functions such as **Help**, **Setup** and **Internal Directory**, for example, are displayed under **Application Hot Keys**.

3) If you want to assign a function key, select it in the drop-down list associated with the function (**Function keys** column).

4) If you want to assign a key on the numeric keypad, select it in the drop-down list associated with the function (**Number pad keys** column).

5) Click **OK**.

> *INFO:* If you accidentally press a function key or assign a key on the numeric keypad twice, an error message will appear on saving the entries, and you can then correct the invalid entry.

## 12.17 How to Reset Hotkeys for the Application

*Step by Step*

1) Click on **Setup** in the tool bar.

2) Click on **My Preferences > Hot Keys** in the menu bar.

3) Click on **Reset**.

*4)* Click **OK**.

# 12.18 How to Start the WBM

*Prerequisites*

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

*Step by Step*

- › Click on **Admin** in the tool bar.

# 13 Appendix

The Appendix provides details on the different authorization levels (classes of service) of contact center agents, possible restrictions on using system features, and the various call number formats. In addition, it also includes notes on the simultaneous usage of myAgent and other UC Suite clients via one UC Suite user account.

## 13.1 Agent Functions Independent of the Authorization Level

When an agent is configured by the administrator of the communication system, the rights of the agent are defined by selecting the authorization level (Agent, Supervisor or Administrator). An agent with the authorization level of a Supervisor or Administrator has elevated privileges.

The differences between the authorization levels are summarized in the following table.

| myAgent: Activity | Authorization level (class of service) | | |
|---|---|---|---|
| | **Agent** | **Supervisor** | **Administrator** |
| Assign an agent to a queue | – | X | X |
| Move an agent to another queue | – | X | X |
| Remove an agent from the queue | – | X | X |
| Change the status of an agent | – | X | X |
| Display / hide the agent binding list | Assigned queues | All queues | All queues |
| Edit an agent assignment | – | X | X |
| Display list of Contact Center calls | Assigned queues | All queues | All queues |
| Activate myAgent screen pop automatically for alarms | – | X | X |
| Activate alarm tone | – | X | X |
| Display wallboard | Assigned queues | All queues | All queues |
| Display the Grade of Service graph | Assigned queues | All queues | All queues |
| Display the Average Times graph | Assigned queues | All queues | All queues |
| Move call to first position in a queue | – | X | X |
| Record a call | Current call | All calls | All calls |
| Save recording of call as WAV file or send as WAV file by e-mail | – | X | X |

| myAgent:<br>Activity | Authorization level (class of service) | | |
|---|---|---|---|
| | **Agent** | **Supervisor** | **Administrator** |
| Save fax as file or send by e-mail | – | X | X |
| Save e-mail as EML file or send as EML file by e-mail. | – | X | X |
| Call monitoring (country dependent) | – | X | X |
| How to Override a Call | – | X | X |
| Accept a request for assistance | – | X | X |
| Create reports | – | X | X |
| Open WBM | – | X | X |

## 13.2  Notes on Using myAgent and UC Suite Clients Simultaneously

When myAgent and other UC Suite clients are used simultaneously via one UC Suite user account, the possibility of mutual interactions cannot be excluded.

The term myPortal is used generically in this section to represent myPortal for Desktop, myPortal for Outlook, myPortal for Mobile, myPortal to go and myPortal for OpenStage.

Examples of mutual interactions:

- Changing the presence status via myPortal
  The examples apply to the default **Voicemail** setting for all call forwarding destinations.
  - myAgent: Agent is logged on.
    myPortal: The automatic reset of the presence status to Office is disabled. Changing the presence status via myPortal causes the agent to be immediately logged out of the queue(s). After the agent logs off via myAgent, the presence status in myPortal is reset to **Office**.
    A change in the agent status via myAgent (e.g., to **Break**) is registered by myPortal, but this does not apply to **Log in**, **Log out** and **Wrap up**.
  - myAgent: Agent is logged on.
    myPortal: The automatic reset of the presence status to Office is enabled. If the agent changes his or her status via myAgent to **Break**, he or she will be automatically available again after the break time has expired.
    A change of the presence status via myPortal to **Break** causes the agent to be immediately logged out of the queue(s).
  - myAgent: Agent is logged on.
    A change of the presence status via myPortal to **Do Not Disturb** causes the agent to be immediately logged out of the queue(s).
- Outbound Calls via myPortal
  The presence status of the subscriber is visible via myAgent.
  The calls appear only in the journal of myPortal. No transfer to the statistics of the Contact Center occurs, since these are not Contact Center calls.

- Incoming calls to the station number of the agent
  The presence status of the subscriber is visible via myAgent.
  The calls appear only in the journal of myPortal. No transfer to the statistics of the Contact Center occurs, since these are not Contact Center calls.
- Record a call
  The recording of calls via myPortal is not registered by myAgent. myAgent offers this function even if the recording of a call is already occurring via myPortal.

# 13.3 Notes on the Use of DECT Phones

DECT telephones can be used as phones for contact center agents. However, the differences in the operating procedure as compared to corded phones must be taken into account.

**Prerequisites for the Use of DECT Phones**

- Only the DECT telephones that are currently released for operation with HiPath Cordless Office and OpenScape Business Cordless may be used.
- The area within which the contact center agents move about must provide a complete wireless coverage.
- The number of base stations must be such that enough B-channels are available for the DECT telephones of the contact center agents.
- As far as possible, a contact center agent should not leave the wireless range while logged into a queue of the contact center.

**Differences in the Operating Procedure as Compared to Corded Phones**

- Logging into a queue of the contact center is only possible through myAgent.
- No messages such as **Available** or **Break**, for example, appear in the display of the DECT telephone.
- The control of a DECT telephone via myAgent (e.g., via the **Telephony** area of the myAgent main window or the screen pop of the incoming myAgent call) is not possible.
- Incoming calls can only be accepted via the DECT telephone.
- Outbound calls must be initiated via the DECT telephone.

Aspects to be considered when using DECT phones:

- Search time
  For an incoming call, the time required to find the DECT telephone may take several seconds (at worst up to 20 seconds) before a call is signaled on the DECT telephone. During the search time, the caller hears the ringing tone. The contact center evaluates this time as "pickup time". The actual pickup time by a contact center agent thus consists of the search time and the alert time (i.e., time until the call is answered).
  If a contact center agent leaves the wireless range with his or her DECT telephone, this may result in longer search times.

- DECT telephone cannot be found
  If a contact center call exceeds the prescribed time for a call to be answered by the agent (e.g., because the contact center agent is out of range), the agent is automatically logged out of the queue or queues involved. Logging in again is only possible through myAgent.

## 13.4  Restrictions on Using System Features

During the operation of the Contact Center, there are some restrictions on the use of system features by agents.

The following system features are not available to agents or are subject to restrictions. These features are, however, not mandatory for agents, since the allocation of calls is handled automatically by the Contact Center. The allocation depends on the set rules and the availability of agents.

- Locked Features
  As soon as a subscriber of the communication system is configured as an agent, the following features are no longer available.
  - Second call
  - Call waiting
  - Intrusion on an agent call (exception: agents with the authorization level of a Supervisor or Administrator)
  - Group Call
  - Do Not Disturb (for logged in agents)
- Features that affect call routing
  The following features could potentially change the call routing in the contact center and should therefore not be executed by agents.
  - Call forwarding
    If a logged in agent activates call forwarding, a logout occurs.
    Call forwarding is disabled as soon as an agent logs into a queue.
  - Do Not Disturb
    If a logged in agent activates Do Not Disturb via a UC Suite client, an automatic logout occurs.
    Do not Disturb is disabled as soon as an agent logs into a queue.
  - Relocate
    Relocating a telephone changes the logical assignment of the station number. The new station number assignment is only transmitted after restarting the Contact Center.
  - Group
    Agents are not allowed to be members of a group (Group Call, Hunt Group) or a MULAP. This restriction also applies to system features used in combination with MULAPs, i.e., Team Configuration (Team Group), Executive/Secretary (Top Group) and Mobility Entry.

## 13.5 Call Number Formats

Call numbers can be specified in different formats.

| Format | Description | Example |
|---|---|---|
| Canonical | Begins with + and always includes the country code, area code and the full remaining station number. Blanks and the special characters + ( ) / - : ; are allowed. | +49 (89) 7007-98765 |
| Dialable | Exactly as you would dial the call number on the system telephone in your office, always with the trunk access code. | • 321 (internal)<br>• 0700798765 (own local network)<br>• 0089700798765 (external local network)<br>• 0004989700798765 (international) |

> *INFO:* If possible, you should always use the canonical call number format. This ensures that a phone number is always complete, unique and consistent in any situation, even in a network.

When dialing an external station (dialable format) manually, the CO access code must always be dialed as well. The CO access code must likewise also be specified when manually entering the destination number (dialable format) for the CallMe service (UC Suite) in UC clients.

When dialing an external phone number in dialable format from a directory (and when using the Desktop Dialer and Clipboard Dialer for certain UC clients), the communication system automatically adds the CO access code (route 1). The automatic addition of the CO access code also occurs when you select a phone number of your own personal data (**Mobile number**, **Private Number**, etc.) as a destination number for the CallMe service (UC Suite).

> *INFO:* For calls within the USA via CSTA to a number in canonical format, phone numbers are converted to the dialable format.

**Related Topics**

• How to Initiate a Call Manually

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