Using the Avaya IP Office Contact Center Configuration and User Interface Configuration Modules

Release 10.1.2
Issue 3
April 2018

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Contents

Chapter 1: Introduction

Purpose

This document describes the UI Configuration ( ) and Configuration ( ) modules in the IP Office Contact Center User Interface for Windows. It is intended for administrators.

The “UI configuration” chapter in this document describes what you can do in the UI Configuration module. The subsequent chapters are focused on tasks you can perform in the Configuration module.

Administrators must finish configuring the IP Office Contact Center User Interface for Windows before agents and supervisors can work in it.

This document is available as a stand-alone PDF and as online help within the UI. You can use the **Help** menu or `F1` key to access online help content.

Note:

The online help version of this document in the IP Office Contact Center build might not be the latest version. Obtain the final version from http://support.avaya.com/. For information about finding documents, see Finding documents on the Avaya Support website on page 150.

Change history

The following table summarizes major changes in this document.

Issue	Release date	Summary of changes
Release 10.1, Issue 1	May 2017	• Added a note in the “Introduction” chapter indicating that the latest version of this document is available at http://support.avaya.com/. • Added more information about **Display Last Topic** states. For more information, see Display Last Topic states on page 31. • Added additional information about web access configuration in Configuring customer data and web access on page 24.

Table continues…

Issue	Release date	Summary of changes
		• Added information about configuration settings for exporting archived emails. A new Export archive emails tab has been added to the Configuration module in this release. • Added additional information about the maximum number of emails in the queue and the impacts of this setting. • Updated privilege names and descriptions. • Updated the chat information in the “Service settings configuration” chapter. For more information, see Chat system settings and archive settings field descriptions on page 146. • Made minor changes in field descriptions throughout the document.
Release 10.1.1, Issue 2	October 2017	• Removed IP Office Contact Center User Interface for Chrome Devices references. Other names for this interface include “Chrome App” and “Chrome UI”. All of these references have been removed. • Added information about enabling audio and video notifications and described the required agent privilege for notifications. • Reorganized and updated the sections under UI configuration on page 21. • Reorganized and updated the sections under Setting privileges for an agent on page 61. • Updated Documentation on page 147.
Release 10.1.2, Issue 3	April 2018	• Updated Object types on page 16. • Updated the list of symbols in Object names on page 18 and General tab field descriptions on page 29. • Updated the information about recording options in Configuring the contact bar on page 21. • Updated Configuring customer data and web access on page 24. • Updated a tab field name in Email tab field descriptions on page 33. • Updated Configuration of job codes on page 41. • Updated Virtual agent groups on page 51. • Described the **Break time allowed** check box in Telephony tab field descriptions on page 54. • Removed a tab field name in Email tab field descriptions on page 55.

Table continues…

Issue	Release date	Summary of changes
		• Added information about the “Use client via SSH” privilege in Agent tab descriptions on page 65. • Removed and changed several tab field names in Profile tab field descriptions on page 71. • Removed and changed several tab field names in Chat tab field descriptions on page 73. • Added the default delay time in External destination properties field descriptions on page 84. • Removed a tab field name in Announcement script field descriptions on page 88. • Added Workplace configuration on page 90. • Updated a field name in Telephony field descriptions on page 126. • Updated Chat tab field descriptions on page 127. • Updated several values in Availability for Tasks field descriptions on page 135. • Updated Documentation on page 147. • Minor rephrasing throughout the document.

Chapter 2: Navigation for the Configuration and User Interface Configuration modules

The Configuration ( ) module is the central module for configuring objects, which agents can use with the telephony, email, or chat task types. You can also use the Configuration module to configure the system settings, change configurations, and delete objects in IP Office Contact Center.

The UI Configuration ( ) module is used to configure the contact bar for a profile or an agent. You can also assign the configured Home and Telephony real time view to a profile or an agent.

You can access both the Configuration and UI Configuration modules from the Administration tab. Alternatively, you can select the module from the **Go to** menu.

Data storage

The system stores data in a database located on a network computer. You must configure the details of the network computer in the server settings.

Configuration module menus

Configuration menu options

This menu allows you to view configured:

- Topics
- Agent groups
- Agents
- Agent profiles

- Teams
- Customers
- External destinations
- Workplaces
- Announcements
- Announcement scripts
- IVRs
- Chat scripts

System menu options

This menu displays the following information:

- General system settings.
- Defined time off periods.
- Reporting settings.
- The period for deleting reporting data. You can delete the reporting data until the selected date.
- Default values for real time information.
- Defined variables.
- Defined tags.
- Configuration reports.
- Default settings for the availability of each task type.
- Skills overview for topics and agents.
- Staff planning interface settings.
- Task report settings.
- Shift plan settings.
- Available break time codes.

Service menu options

This menu displays the following information:

- Reporting filters for each object and task type.
- Special settings for objects.
- Default telephone settings.
- Announcement modules.

- Configured PBXs.
- Configured country settings. This setting is optional.
- Configured queue devices.
- Configured telephones.
- Configured telephone groups.
- Details of the configured CHAP server.
- Details of the configured Voice Extension Adapter (VEA).
- Selection codes for agent PBXs.
- Selection codes for topic PBXs.
- Email settings for the system.
- Details of the configured chat server.
- Chat settings.

Windows menu options

This menu allows you to:

- View or hide the status bar.
- Save current settings. You can use this setting the next time you start the module.

Objects in the Configuration module

Object types

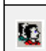
Icon	Description
	Displays the list of configured topics. A topic is a service or a task to carry out in IP Office Contact Center.
	Displays the list of configured agent groups.
	Displays the list of configured agents.
	Displays the list of configured profiles. A profile consists of group assignment, authorizations, privileges, and a telephone.
	Displays the list of configured teams.

Table continues…

Icon	Description
	A team is a group with more than one agent.
	Displays the list of configured IVRs.
	Displays the list of configured customers. A customer is an object that provides information to the agent about the calling party.
	Displays the list of configured external destinations.
	Displays the list of configured workplaces. A work place is the list of users logged in to the IP Office Contact Center.
	Displays the available break time codes.
	Displays the details of the private branch exchange (PBX) server.
	Displays details, such as country code and international code, for the destination number.
	Displays the configured queue devices.
	Displays the configured telephones.
	Displays the configured telephone groups.
	Displays the details of the configured CHAP server.
	Displays the details of the configured Voice Extension Adapter.
	Displays the details of the configured chat server.
	Displays the list of configured chat scripts.

Task types for objects

When you select a task type in the **View** field, the system displays the related objects.

Task type	Description
Telephony	Displays the configured PBXs.
Email	Displays the configured email archives.
Chat	Displays the configured chat servers.
Virtual	Displays the configured virtual agent groups.

You can select an object of a specific task type. The View list displays only the objects configured for the selected task type. If you click **All**, the system displays all objects for the different task types.

You can use the field available at the bottom of each list to search for an item in the list. The Status bar displays information about the selected element.

Note:

When working with the Configuration module, you must click the **Refresh** button to view the latest modifications made to the objects by you or another administrator.

Object names

You can use the Configuration module to change the name of an object. The name of the object in the Configuration module also defines the object in the Task Flow Editor. You might not be able to change the name of an object that the Task Flow Editor and the Configuration module use. For example, you might not be able to change the name of a topic that the task flow set uses.

Important:

When you change the name of an object, do not use the following characters:

- Percent (%)
- At sign (@)
- Quotation marks (“ “)
- Inch mark (")
- Exclamation point (!)
- Backslash (\)
- Angle brackets (<>)
- Vertical bar (|)
- Slash mark (/)
- Question mark (?)
- Equal sign (=)
- Brackets ([ ])
- Parentheses ()
- Braces ({})
- Euro symbol (€)

Configuring the object details displayed in a table

About this task

Information about objects is displayed in a table. You can customize the type of information that is displayed in the table.

Procedure

1. In the table view, click **Columns**.

   The system displays the Configuration of Columns dialog box.

2. Clear the **Use default settings** check box.
3. To configure visible columns, select an object and click >>>.
4. To remove an object, select an object and click <<<.
5. Click **OK**.

   The system displays the table of objects with the configured columns.

Changing the order of objects in the table

Procedure

1. Click the column heading.

   The system arranges the entries in the table in alphabetic order for the selected column. The selected column heading displays next to the column name.

2. To change the order again, click the column heading.

   The system sorts the table in reverse order. The column heading displays next to the column name.

Working with keyboard functions

Procedure

- To select a list box, press the `Space` bar.
- To move to the next command or button, press the `Tab` key.
- To return to the previous entry, press `Shift` + `Tab`.
- To increase a numeric entry, press the upward arrow on your keyboard.
- To decrease a numeric entry, press the downward arrow on your keyboard.
- To select the maximum value of an entry, press the `Page Up` key.
- To select the minimum value of an entry, press the `Page Down` key.

UI Configuration module folders

The UI Configuration module has a left pane and a right pane. The folders in the left pane displays the following:

- The configured systems.
- A list of configured profiles.

- A list of configured agents.

Updating the configuration for an agent

Procedure

1. On the UI Configuration tab, click the Agent folder.
2. From the list of configured agents in the right pane, double-click an agent name.

   Use the UI configuration for agent dialog box to update the information configured for the agent.

Updating the profile view

Procedure

1. On the UI Configuration tab, click the **Profiles** folder.
2. From the list of configured profiles, right-click a profile to make the change.
3. In the pop-up menu, click **Refresh** to view the profile changes.

Chapter 3: UI configuration

This chapter describes tasks you can perform with the UI Configuration module.

Configuring the contact bar

About this task

You can configure the contact bar for a system, profile, or agent.

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. Click the **Contact bar** tab.
3. To keep the default contact bar configuration, select the **Default** check box.
4. In the right pane, double-click an item in the list.
5. To change the items available, move items from **Available elements** to **Selected elements**, and click **Add**.
6. **(Optional)** To remove an item from the contact bar, select the item in **Selected elements**, and then click **Remove**.
7. To change the order of items in the contact bar, use the **Up** and **Down** buttons.
8. To add the call recording option to the contact bar, in the **Call recording on (element: recording)**, do the following;
   a. Click  to select a topic.
   b. Click  to choose an external destination.

   Note:

   You can also add the **Recording pause** button to the contact bar. If you click on it, the recording will be unpaused after 15 seconds by default. You can change this setting in IP

Office. For more information about setting the delay time for unpausing the recording, see *Administering Avaya IP Office™ Platform with Manager*.

9. Click **OK**.

Configuring the Home tab

About this task

Use this procedure to customize the Home screen view.

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. In the UI Configuration dialog box, click the **Home** tab.
4. To keep the default view, select the Default check box.
5. To change the **Home** screen view, click ... to browse for a new file.
6. Click **OK**.

Configuring the Telephony tab

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. In the UI Configuration dialog box, click the **Telephony** tab.
4. In **Current Telephony**, do one of the following:
   - Upload a new file to use for the main Telephony screen.
   - Select the **Default** check box to use the default Telephony screen.
5. **(Optional)** Select the **In the foreground with dialer calls** check box if you want the Telephony screen you selected to be used when a Dialer call is distributed.

6. **(Optional)** From **Current quick bar**, do one of the following:
    - Select the **Default** check box to use the default quick bar.
    - Upload a new file.
7. Click **OK**.

Configuring the Email tab

About this task

Use this procedure to configure preset settings for email.

Before you begin

You must have the “UI config.Email” privilege.

Procedure

1. From the UI Configuration screen, select one of the following:
    - **System**
    - **Profile**
    - **Agent**
2. In the right pane, double-click an item in the list.
3. In the UI Configuration dialog box, click the **Email** tab.
4. Customize the font settings for email or select **Default** to use the default font settings.

    The default font settings are:

    - Default font name: Verdana
    - Default font size: Small
    - Default text color: Black

    Note:

    The IP Office Contact Center Web User Interface does not conform to these settings.
5. To force automatic spell check before emails are sent, select **Automatic spell check**.

    The default setting is for automatic spell check to be disabled. If you have not changed this default setting in the **System** menu, then automatic spell checking will remain disabled if you select **Default**.
6. Click **OK** to save your changes.

Configuring the Autostart RT Information tab

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. Click the **Autostart RT Information** tab.
4. Do one of the following:
   - Select the **Default** check box to keep using the default view.
   - To upload a new monitor file, clear the **Default** check box, click **Add**, and select a file.
   - To remove an existing item, click **Remove**.
5. Click **OK**.

Configuring customer data and web access

About this task

The administrator can configure up to six customer information fields. Use this procedure to configure customer data in the IP Office Contact Center User Interface for Windows. This data is also displayed in the IP Office Contact Center Web User Interface.

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. Click the **Web UI agent** tab.
4. Do one of the following:
   - To keep the default information, select **Default**.
   - To customize information, clear **Default**.
5. Use the available buttons in **Customer Data** to add, remove, rename, or edit information.

Customer Data allows you to configure the type of customer information that agents can access. You can also configure call tags. The call tags you configure are displayed in the IP Office Contact Center Web User Interface.

6. Use **Web Access** to add, remove, or change the URLs that agents can use to perform research about customer requests.

   When you add or change the URL for a website, ensure you enter the complete URL, which must include a protocol, such as HTTP or HTTPS. The URL cannot start with `www`.

   You can also define whether you want the URL to open in a new tab or a new browser window. If you are using an unsecured HTTP connection, select the option to open the URL in a new browser window.

Customizing the threshold and variables

Customizing the threshold

About this task

You can customize thresholds and variables. You can define the following threshold values:

- **Min**
- **Max**
- **Warning**
- **Alarm**

The values you define are also displayed in the IP Office Contact Center Web User Interface.

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. In UI configuration for agent, click **Web UI**.
4. Click the **Default** check box if you want to define your own values.
5. To edit threshold information, select an item and click **Edit**.
6. Click **OK**.

Customizing variables

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. In UI configuration for agent, click **Web UI**.
4. Click the **Default** check box if you want to define your own values.
5. Use the available variable options to add, edit, rename, or remove a variable.
6. **(Optional)** Use the **Up** and **Down** buttons to reorganize your variables.
7. Click **OK**.

Color customization options

You can change the default colors and the text color of certain real time views. However, you cannot change the color of the Absent state.

Color change affects the following real time views:

- Pie chart
- Agent status for AG (grid)
- Agent status for team (grid)

You can change the default colors of the following states:

Agent Status	Default background color	Default text color
Present		
Break Time		
Non ACD active		
Free		
ACD active		

Configuring the Realtime Information tab

Procedure

1. From the UI Configuration screen, select one of the following:
   - **System**
   - **Profile**
   - **Agent**
2. In the right pane, double-click an item in the list.
3. Click the **Realtime information** tab.
4. Clear the **Default** check box so you can change the default options.
5. Click a background or text color.
6. In the Select Colors dialog box, select a color, and click **OK**.

   For more information on color customization, see Color customization options on page 26.

   The system changes the color and displays a cross next to the color box.
7. **(Optional)** To restore the default color setting, do one of the following:
   - Click the cross icon .
   - Select the **Default** check box.
8. **(Optional)** To disable flashing, select the **Turn off flashing of the taskbar on Realtime information alarms** check box.
9. Click **OK**.

Chapter 4: Topic configuration

This chapter describes options available in the Configuration module.

A topic is a service or a task that you run in the IP Office Contact Center system. A name and a destination dialed by a customer identifies a topic. A topic can be an email address, a dialed number, or a chat session. You must assign each topic to an agent group. You need details, such as the topic name and agent group name, to configure a topic.

In IP Office Contact Center:

- You can configure up to 4000 topics in a PBX system using the required licenses.
- You cannot configure a topic without an access code or an external line code.
- You need special privileges to change the name of an existing topic.

Topic tab field descriptions

Name	Description
Name	Displays the name of the topic.
Tel	Displays the Telephony task type for which you configured the topic.
Email	Displays the Email task type for which you configured the topic.
Chat	Displays the Chat telephony for which you configured the topic.
Number	Displays the topic number.
Active	Displays a symbol *X* indicating that the system set up the topic number in the CHAP configuration.
PBX	Displays the PBX of a topic.
E-mail address	Displays the email address of a topic.

Topic functions field descriptions

Name	Description
Edit	Displays the selected topic in the edit mode.
Create	Creates a new topic.
Copy	Copies the selected topic.
Delete	Deletes the selected topic.
Blocked periods	Displays the blocked periods for the selected topic in the edit mode.

Setup fields

The following sections describe the tab fields that you can edit for a topic.

General tab field descriptions

<table>
<tr><th>Name</th><th>Description</th></tr>
<tr><td>Name</td><td>Displays the name of the selected topic. You can use a topic name only once. You can use maximum 29 alphanumeric characters.

Note:

When you change the name of a topic, do not use:
• Percent (%)
• At sign (@)
• Quotation marks (“ “)
• Inch mark (")
• Exclamation point (!)
• Backslash (\)
• Angle brackets (<>)
• Vertical bar (|)
• Slash mark (/)
• Question mark (?)
• Equal sign (=)
• Brackets ([ ])
• Parentheses ()
• Braces ({})</td></tr>
</table>

Table continues…

Name	Description
	• Euro symbol (€)
Task type	Displays the task types for the selected topic. You can configure a topic for the following task types: • Telephone • Email • Chat **Note:** The system displays a new tab for each task type.
Priority	Displays the priority of the selected topic. You can assign a priority to a topic. The priority is evaluated only if the IP Office Contact Center server handles the call routing. You can set the priority between 0 and 100.
Display Last Topic	Specifies whether the name of the last topic is displayed to the agent for topic overflow and transfer. **Display Last Topic** has three states, which are described in Display Last Topic states on page 31. **Note:** The configuration of the **Display Last Topic** value has no effect on historical reporting. With historical reporting, the abandoned or conversation counters are always counted for the last topic.
Use reporting values for routing	Enables you to select the reporting values that can be evaluated in the routing for the selected topic. You can select one or more of the following values: • **TSF**: When selected, the value is set to 100. • **Accept level**: When selected, the value is set to 100. • **Avg. Waiting Time**: When selected, the value is set to zero. None of these values are selected by default. You can use these values as topic variables in a task flow.
Blocked periods	Displays the blocked periods for the selected topic. You can configure the blocked periods for a topic. The symbol x specifies the number of blocked periods that you configure.
Variables	Displays the variables for a topic. You can add, modify, or delete the variables of a topic.

Display Last Topic states

The **Display Last Topic** check box has the following states:

- The default state is when the check box is greyed out or has a black box (for example, ▣). In this case, the topic name and job code configuration details are obtained from the first topic. With real time information, such as a shift plan, the call is counted for the first topic.
- When the check box is selected (☑), and this setting is used in the first topic, the topic name and job code configuration are obtained from the last topic. In the overflow topic configuration, the default configuration for **Display Last Topic** must be active. In this case, the call is counted in real time information for the overflow topic.
- When the check box is clear or empty (☐) and this setting is used in the last topic, the topic name and job code configuration are obtained from the first topic even if **Display Last Topic** is activated in the first topic.

Topic impact scenario

This scenario describes how the state of the **Display Last Topic** check box impacts topics. There are two topics described in this scenario: Topic 1 and Topic 2.

- When Topic 1 is in the default state, where the check box is greyed out or has a black box, the following occurs:
  - If the check box for Topic 2 is also in the same default state, then Topic 1 is displayed.
  - If the check box is selected for Topic 2, then Topic 2 is displayed.
  - If the check box is cleared or not selected for Topic 2, then Topic 1 is displayed.
- When the check box is selected for Topic 1, the following occurs:
  - If the check box for Topic 2 is in the default state, then Topic 2 is displayed.
  - If the check box is selected for Topic 2, then Topic 2 is displayed.
  - If the check box is cleared or not selected for Topic 2, then Topic 1 is displayed.
- When the check box is cleared or not selected for Topic 1 , the following occurs:
  - If the check box for Topic 2 is in the default state, then Topic 1 is displayed.
  - If the check box is selected for Topic 2, then Topic 2 is displayed.
  - If the check box is cleared or not selected for Topic 2, then Topic 1 is displayed.

Telephony tab field descriptions

Name	Description
Topic Number	Displays the **Access code** and the **Postdial** fields in the PBX settings.

Table continues…

Name	Description
Agent group	Specifies the default agent group for a topic. The default agent group cannot be automatically used for distributing calls. Therefore, the configuration in the task flow is used.
Wrap Up	Displays the wrap up time for the topic.
Ring timeout	Specifies the maximum ring time in seconds for the agent to accept the call. This value only applies for calls that are not routed through an agent group. The calls are routed to the last agent or the personal contact.
Max. reservation time	Specifies the maximum time that a topic call can be reserved in a queue for a special agent until the topic call is routed through Task Flow rules.
Phone number transmission	Specifies the number used for outgoing ACD topic calls to display at the destination phone. This number is used when the call is initiated by an agent using the **Dial** button in the UI. This option is also used for call back from an abandoned list and for topics used in a dialer campaign. By default, the number is empty.
VMPro recording	Specifies the options for automatic recording in Voicemail Pro. If you select this check box, then the VMProRec variable gets attached to the topic. You can select one of the following values: • **Never** • **Recording Type VRL** • **Recording Type VRLA** • **Use Mailbox number** If you select **Use Mailbox number**, the **Mailbox number** field is enabled.
Mailbox number	Enter the mailbox number for automatic recordings in Voicemail Pro. This field is displayed when you set **VMPro recording** to **Use Mailbox number**.
Script for playing voice mails	Displays the script for voice mails. When the system gets a voice mail for the selected topic, the system starts the script. The script processes the voice mail and can play the voice mail.
Job Codes	Configures the job codes for the selected topic. You can determine the length of the job code and predefined codes. On a personal computer, the job codes are displayed as a list, which simplifies the input and allocation of a job code.
Reporting/RT info	Displays the reporting and real time information. For reporting and real time information, you can use the default settings or configure new settings. You can determine the default settings using the system settings.
Skills	Displays the topic skills.

Table continues…

Name	Description
	You can select the topic skills for the Telephony task type.
Routing	Displays the routing details for the selected topic. You can set the **Hold duration** and the **Minimum contact time** fields for the Last agent function. You can also configure the routing for the Last agent, Current agent, and Personal contact objects in the IP Office Contact Center system. If the objects are in the kernel, you can define a sequence for the objects.

Email tab field descriptions

Name	Description
Mailbox	Displays the mailbox of a topic.
Max E-mails in routing	Enables you to specify the maximum number of emails in the queue, which are considered by the routing process. You can set the number between 100 and 5000. The default value is 1000. **Note:** You can also restrict the number of emails in a topic queue by editing the topic variable, and setting **Tag** to **MaxTaskPerTopic**. If you enter any value that is outside the range of 100 to 5000, it will be overwritten by the default value of 1000 when you save the topic configuration. For information about the impact of restricting the number of emails, see Restriction on the number of emails for routing on page 34.
Max. time to accept	Displays the maximum time to accept an email. You must define the time in the hours and minutes (hh:mm) format. The time to accept an email starts as soon as the email arrives in the inbox folder of the agent. If an agent does not open an email before the maximum accepting time, the workplace is logged out of the distribution for all agent groups.
Job Codes	Configures the job codes for the selected topic. You can determine the length of the job code and predefined codes. On a personal computer, the job codes are displayed as a list, which simplifies the input and allocation of a job code.
Reporting/Realtime information	Displays the reporting and real time information. For reporting and real time information, you can use the default settings or configure new settings. You can determine the default settings using the system settings.
Skills	Displays the topic skills. You can select the topic skills for the Email task type.

Table continues…

Name	Description
Routing	Displays the routing details for the selected topic. You can set the **Hold duration** and the **Minimum contact time** fields for the Last agent function. You can also configure the routing for the Last agent, Current agent, and Personal contact objects in the IP Office Contact Center system. If the objects are in the kernel, you can define a sequence for the objects.
Add ticket ID in subject	Adds a ticket ID. You can automatically assign a ticket ID in a new email that arrives as a topic. The system uses the ticket IDs to logically connect the customer requests and the queries relating to the same transaction. If you select the **Add ticket ID in the subject** check box, the system inserts the ticket ID in the subject. The system updates the subject line only when you reply or forward an email. If you delegate an email, the subject of the email does not change. To activate the changes, you must restart the service C3000 Client adapter.
Agent group	Specifies the default agent group for a topic. The default agent group cannot be automatically used for distributing emails.

Restriction on the number of emails for routing

Routing and reporting impacts

When an email reaches the system, the task server signals the kernel process. The kernel signals the task to the vectors process to route the email according to the active task flow. The kernel also signals the task to the statistic_Srv and the monitor_srv processes for reporting to calculate the real volume of emails in the system.

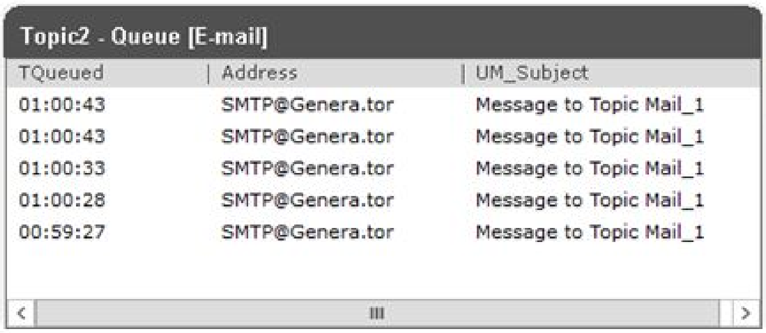
When the number of emails in the system increases, the number of tasks to distribute through vectors also increases, and this increase affects the routing of voice calls. To avoid call distribution being slowed down by the number of emails in the system, the number of emails considered by the vectors process is restricted to 1000 per topic by default. If the topic contains more emails than the number set in **Max E-mails** in queue, then additional emails are not signaled to the vectors process. These additional emails are deactivated. When the number of queued emails decreases, then these emails are activated and signaled to the vectors process for routing. The oldest deactivated emails are re-activated first.

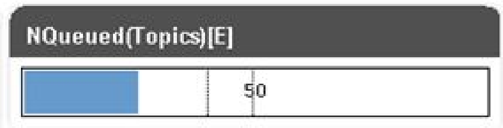
In the TTrace console, you can check the number of queued and deactivated emails in the task server using the `PrintServerState` command.

Realtime Information impacts

In the Realtime Information module, the NQueued monitoring element shows total number of active and deactivated emails that are waiting for the topic. The maximum possible value is the limit that you set for the email configuration in **System** > **General**.

The Queue [E-Mail] list shows the emails in the topic queue, which are ready to be distributed to an agent. These emails in the topic queue are evaluated by the vectors process according to the active task flow.





Chat tab field descriptions

Name	Description
Jabber Identifier	Displays the Jabber ID, which enables addressing for the user on the chat server. The Jabber ID uses the following format: • topic1@domain.com/ipocc • Node @ Domäne / Resource The first part is the address of the node. The node represents the user name. You can enter a user name. The complete Jabber Identifier is composed of the IP Office Contact Center system. The domain is derived from the selected taskserver. The IP Office Contact Center system uses *ipocc* as the resource.
Password	Displays the password of the chat user.
Max. time to accept	Specifies the maximum time in minutes and seconds (mm:ss) for an agent to accept a chat request.
Chat script at	Displays the selected chat script for the following states: • Reject • Hold • End Automatic text is configured as a chat script.
Agent group	Specifies the default agent group for a topic. The default agent group cannot be automatically used for distributing chat requests.
Job Codes	Configures the job codes for the selected topic. You can determine the length of the job code and predefined codes. On a personal computer, the job codes are displayed as a list, which simplifies the input and allocation of a job code.
Reporting/RT info	Displays the reporting and real time information. For reporting and real time information, you can use the default settings or configure new settings. You can determine the default settings using the system settings.
Skills	Displays the topic skills. You can select the topic skills for the Chat task type.

Configuration of mailbox details

The following sections list the mailbox fields and procedures you can perform to configure your mailbox.

Mailbox details field descriptions

Name	Description
Email	Displays the mailbox email address.
Reply to	Displays the reply address for a received email. If an agent uses the Reply function to reply to an email, the system uses the **Reply to** address in the MIME message. The **Reply to** address might not be the address of the sender. This option is primarily used to control replies to emails that the agent sends or the system sends automatically.
From	Displays the from address of the email. You can use the **From** option to change the from address of an email. As a general setting, the system uses the topic address as the from address.
Mailbox active	Specifies that the selected mailbox accepts and routes the emails. If you select the **Mailbox active** check box, the selected mailbox accepts and routes the emails. If you do not select this option, the system processes the emails that are routed in realtime to topics until the topic does not contain any more emails.

SMTP protocol

You need not configure the specific settings for the SMTP protocol. You can select the **Mailbox Active** option to set the system to accept the email and route the emails to the corresponding topic. If you do not select this option, the system does not receive the emails. Before UMR, the system sends an error message to the upstream mail server indicating that the mailbox is unavailable. The upstream mail server receives the emails from the customers to the company.

POP3 protocol field descriptions

Name	Description
Mail server	Displays the name of the mail server.
Port	Displays the default port. The default port number is *110*.

Table continues…

Name	Description
User	Displays the mailbox address.
Polling interval	Displays the interval at which the system retrieves the unread messages.
Password	Displays the password that the user configures.
Confirm password	Confirms the password that the user configures.

Note:

If you select the **Mailbox active** check box, the system receives and then routes the emails to the respective topic. If you do not select the **Mailbox active** check box, the POP3 mailbox receives the emails, but does not retrieve the emails. The upstream email server receives the emails from the customers to the company.

IMAP4 protocol field descriptions

Name	Description
Mail server	Displays the name of the mail server.
Port	Displays the default port. The default port number is *143*.
User	Displays the mailbox address.
Polling interval	Displays interval at which the system retrieves the unread emails.
Password	Displays the password that the user configures.
Confirm password	Confirms the password that the user configures.
Action	Specifies the action that the system does after retrieving the emails. The options are: • **Mark as read** • **Moved** • **Deleted**
Folders	Specifies the folder to which you can move the emails. You can select the **Move** option to move the emails to the folder.

Note:

If you select the **Mailbox active** check box, the system receives and then routes the emails to the respective topic. If you do not select the **Mailbox active** check box, the IMAP4 mailbox receives the emails, but does not retrieve the emails. The upstream email server receives the emails from the customers to the company.

Configuring POP3 topics

About this task

When you use the POP3 protocol, the system retrieves and deletes messages from the **Inbox** folder.

Before you begin

Configure the email settings.

Procedure

1. Click **Configuration** > **Topics** > **Create**.
2. In the Topic-Create dialog box, do the following actions:
    a. In the **Name** field, type a name.
    b. Select the **Email** check box.
       The system displays the Email tab.
3. Click the **Email** tab.
4. In the **Mailbox** field, click **Details**.
5. In the Mailbox details dialog box, enter the required details.

   Note:

   The email address of the topic must contain a name and a domain.
6. In the **Protocol** field, click **POP3** and do the following actions:
    a. In the **Encryption** field, click **SSL/TLS**.
    b. In the **Mail server** field, type the name of the mail server that you want to use.
    c. In the **Port** field, ensure that the default value is set to `995`.
    d. In the **User** field, type the mailbox address that you want to use.
    e. In the **Polling interval** field, enter the interval at which you want the system to retrieve all messages.
    f. In the **Password** field, enter the password.
    g. In the **Confirm password** field, reenter the password.
    h. Click **OK**.
       The system displays the details in the Email tab.
7. Click **OK**.

   The system displays the topic in the list of topics.

Configuring an IMAP4 topic

About this task

This feature does not work with the secure password authentication.

Before you begin

Configure the email settings.

Procedure

1. Click **Configuration** > **Topics** > **Create**.
2. In the Topic-Create dialog box, do the following actions:
    a. In the **Name** field, type a name.
    b. Select the **Email** check box.

       The system displays the Email tab.
3. Click the **Email** tab.
4. In the **Mailbox** field, click **Details**.
5. In the Mailbox details dialog box, enter the required details.

   Note:

   The email address of the topic must contain a name and a domain.
6. In the **Protocol** field, click **IMAP4** and do the following:
    a. In the **Encryption** field, click **StartTLS**.
    b. In the **Mail server** field, enter the name of the mail server that you want to use.
    c. In the **Port** field, enter `143`.
    d. In the **User** field, enter the mailbox address that you want to use.
    e. In the **Polling interval** field, enter the interval at which you want the system to retrieve all messages.
    f. In the **Password** field, enter the password.
    g. In the **Confirm password** field, reenter the password.
    h. In the **Action** field, select one of the following options:
        - Mark as read
        - Moved
        - Read
    i. In the **Folders** field, select the folder to which you want to move the retrieved messages, and click **Moved**.

       The system moves the messages to the selected folder.

j. Click **OK**.

The system displays the details in the Email tab.

7. Click **OK**.

The system displays the topic in the list of topics.

Configuration of blocked periods

You can configure the blocked periods for a topic. The number ***(x)*** displays the number of blocked periods that you define for a topic. You can create, change, or delete the blocked periods. You can evaluate the blocked periods in the Task Flow Editor module. In Task Flow Editor, you must use a logic unit to take the defined periods into account with the term `q(?) blocked`. The question mark is a placeholder for the topic. If the present time matches a blocked period for a topic, then the system sets the term `q(?) blocked` to 1.

Note:

Other than holidays, the blocked periods are only valid for the selected topic.

Blocked periods field descriptions

Name	Description
Beginning	Displays the start date and time for a blocked period. You can set the start date and time for a blocked period. If you select the **Daily** option, you can set the time only for a blocked period. If you select the **Weekly** option, you can specify a day. **Note:** You can enter the date and time for a blocked period by using the respective input controls.
End	Displays the end date and time for the blocked period. You can set the end date and time for a blocked period. If you select the **Daily** option, you can set the time only for a blocked period. If you select the **Weekly** option, you can specify a day. The end date and time of a blocked period must be greater than the start date and time.
Repetition	Specifies the repetition of the blocked periods. You can select one of the following options: • **None (one-time-only)**

Table continues…

Name	Description
	• **Daily**: For example, regular breaks such as daily lunch break from 12:00 p.m. to 12:30 p.m. • **Weekly** • **Yearly**: For example, national holidays.

Configuration of job codes

You can use a job code by selecting the **Use job code** option. The system displays the predefined job codes with the code and name. You can insert, change, or delete job codes. The system uses the job codes for reporting evaluations or to assign calls to certain processes and activities.

For a topic, you can determine whether a job code is mandatory. If a job code is mandatory, the system does not assign another call to the agent until the agent selects or enters a job code.

Job codes field descriptions

You can configure a fixed job code with a description.

Field	Description
In this topic	Specifies if the topic requires a job code. The options are: • **Do not use job codes**: Specifies that the topic does not require a job code. • **Use job codes**: Specifies that the topic uses job codes. • **Force job code**: Specifies that the topic must use job codes.
Job code length	Specifies that the job code length must be set between 1 to 20 digits.
Predefined codes	Displays the predefined job codes. You can insert, change, and delete the predefined job codes.
Code	Displays the code for the job code. You can only use digits for the code. The number of digits that you use for a code must not be more than the job code length.
Name	Displays the name of the code. You can use maximum 29 alphanumeric characters to describe a code.

Routing configuration

You can set the hold time and minimum contact time for the last agent function. You can also configure how the IP Office Contact Center system routing handles the Last agent, Current agent, and Personal contact objects.

Options for routing calls and emails

If you use the kernel process:

- The kernel process routes calls and emails for the assigned objects.
- The sequence of objects determines the priority. For example, the top object has first priority, and the next object has second priority.

If you use the vectors process, the vectors process routes calls and emails for the assigned objects. You must define how the system routes the calls and emails in terms of the Last agent, Current agent, and Personal contact in the task flow.

Recommendation for high load systems

You must use the rules defined for the Last agent, Current agent, and Personal contact objects in the kernel process to reduce the load in the high load systems. You can also use these rules to reduce the number of calls and emails that the vectors process routes.

Routing functions field descriptions

Name	Description
Hold duration	Displays the duration of hold time for emails in hours and minutes. You must use the hours:minutes format. The hold duration specifies how long the assignment between the caller or sender and the agent is saved. For calls, the duration begins after a conversation ends. For emails, the duration begins after an agent sends the email.
Minimum contact time	Displays the minimum contact time for emails in hour and minutes. This time specifies the minimum time for which the contact between the caller and agent must exist or an agent must take to process an email. If an agent does not meet the minimum contact time, the system does not include a call or an email in the last agent function.
Task Flow (vectors)	Displays the objects in the **Task Flow** list.
Automatic (kernel)	Displays the objects in the **Automatic** list

Icon	Name	Description
	**Move right**	Inserts the selected object in the Automatic list, which is the kernel.

Table continues…

Icon	Name	Description
	**Move left**	Inserts the selected object in the task flow list, which is the vector.

Chapter 5: Skills configuration

You can insert skills for each task type of a topic or an agent and define the skill levels. You can use the Skill tab in the Topic skills or Agent skills dialog box to insert, modify, and delete a skill. You can modify a skill by editing the name and skill level directly in the list.

The skill level displays how high the skills and knowledge of an agent must be in a certain area, so that the system assigns the respective call or email to the agent. You must specify skill level in percentage with a minimum 0 and a maximum 100 percentage. You can insert a skill to the list of skills. You can configure the skills in the System menu in the Tag list.

Skill tab field descriptions

The Skill tab displays the defined skills with the details, such as skill name and skill level. You can use the Skill tab to set up skills and skill levels valid for the respective topic or agent.

Name	Description
Skill	Displays the configured skills for the topic. For a topic, you can configure the Telephony tasks and skills for Email tasks separately.
Level	Displays the skill level.
Topic Overflow	Displays the selected topic overflow option. You can use the configured skills or set up your own skills. You can also select one or both the following options: • **Keep original skills**: The system deletes or retains the skills or the dialed-in topics. • **Set own skills**: The system adds the skills of the overflow. **Note:** For a dialed-in topic, all skills are added independent of the configuration of the **Get original skills** and **Set own skills** parameters. To delete skills specifically for a call or an email, you must use a tag operation to set the skill to zero in the Task Flow Set.

Configuration of skill-based routing

You can use skill-based routing to connect call center customers to the agents who are uniquely qualified to deal with the problems, questions, and requests of the customers. You must configure the agent skills, skill levels, and task flows to distribute the contacts to the most qualified agents. You must set skill tag names, topic skill levels, and agent skill levels to configure skill-based routing.

Skills and skill levels

Every call center agent has certain skills that specify the knowledge and abilities of the agent. The skill levels quantify the knowledge and abilities of an agent and indicate how good are the skills of an agent in a certain area.

You can create skill topics that equate to knowledge and ability areas and set skill levels for each skill using percentages to configure skill-based routing. You must identify the skill levels required to manage customer calls and emails regarding specific topics, and route the contacts to the appropriate agents. You can assign more than one skill to an agent and a topic. The system must meet all criteria to route a contact.

For example, the following list displays the skills and skill levels for agents who are fluent in English, have some fluency in German, and do not speak French.

Skill	Skill level
Agent is fluent in English.	100
Agent is fluent in German.	80
Agent is fluent in French.	0

When a customer calls and requires an agent who speaks French, the system does not route the call to an agent who does not speak French.

Configuring the skill tag names

About this task

You must configure skills by adding the descriptive tag names of the skills to use the dynamic skill-based routing.

Procedure

1. Click **System** > **Tag List** > **Add**.

2. In the Tag-Create dialog box, enter the following details:
    a. In the **Name** field, type a tag name.
    b. In the **Type** field, select **Skill**.
    c. Click **OK**.

       The system displays the new tag in the **Defined tags** list.
3. Click **OK**.

   The system saves the new tag.

   Note:

   You can add more tags in the list if required.

Configuring the topic skills and skill levels

Before you begin

Configure the skill tag names.

Procedure

1. On the **Configuration** menu, click the **Topics** tab.
2. To edit the properties of a topic, double-click the topic.
3. In the **Task type** field, select one of the following options:
    - **Telephony**
    - **Email**
    - **Chat**

   The system displays a tab for the selected task type. For example, if you select **Email**, the system displays the Email tab.
4. In the task type tab, click **Skills**.
5. In the Topic skills dialog box, do the following:
    a. Click **Add**.
    b. In the Select skill dialog box, select a tag and click **OK**.

       The system displays the selected tag in the **Skill** list.
6. In the **Level** field, enter a skill level.

   Note:

   This value determines the skill level as a percentage and the maximum level is 100. You can use this setting to specify the minimum skill level requirement for an agent to handle a contact tagged with the selected tag.

7. Click **OK**.

   The system displays the tags and the skill levels in the list.

   Note:

   You can add more tags if required.

8. Click **OK**.

   The system saves the skill configuration.

Configuring the agent skills and skill levels

Before you begin

- Configure skill tag names.
- Configure topic skills and skill levels for all skills for each agent.

Procedure

1. On the **Configuration** menu, click **Agent**.

   The system displays the Agent tab.

2. To edit the properties of an agent, double-click the agent name.

   The system displays the [Agent]–Edit dialog box.

3. Click **Skills** > **Add**.

   The system displays the Select skill dialog box.

4. Select a tag and click **OK**.

   The system displays the selected tag in the Skill list.

5. In the **Level** field, enter a skill level.

   Note:

   This value determines the skill level as a percentage where the maximum level is 100. You can use this setting to specify the minimum skill level requirement for an agent to handle a contact tagged with the selected tag.

6. Click **OK**.

   The system displays the tags and the skill levels in the list.

   Note:

   You can add more tags if required.

7. Click **OK**.

   The system saves the skill configuration

Statistical values in the task flow

You can use the statistical values in the task flows to control call distribution. You can also adjust the call distribution by setting service level thresholds in the task flow, and you can use the **TSF** or **Accept level setting** to adjust thresholds. You must use the **Accept level setting** in the contact centers where you must only guarantee the acceptance rate.

You must configure a statistical value consisting of **TSF**, accessibility, and average wait time as a variable in the Monitor_srv process and store the value in the database. After restarting the system, the system uses the last stored variable. The first update occurs after 15 minutes so that sufficient statistical values can collect for a reliable calculation.

You must configure the following parameters in a topic:

- The TSF parameter **Mon_TSF** with a start value of 100.
- The Accept level parameter **Mon_AcceptLevel** with a start value of 0.
- The Average wait time parameter **Mon_AvgTConvWait** with a start value of 0.

Call routing based on product knowledge of agents

The system uses skills-based routing to distribute contacts to agents based on a specific level of product knowledge.

In this example, the system uses the skill tag names configured using the Telephony task type. Three agents are signed on and available. Without sorting according to the skill, the system determines the most qualified agent by using the following formula:

```
knows product A + knows product B.
```

In this example, the system configures the following skills for a topic called 4711:

- Knows product A
- Knows product B

For an incoming contact tagged with topic 4711, an agent must have 50% skill level for product A and 70% skill level for product B to be connected to the contact.

	Skill: Knows product A	Skill: Knows product B
Topic skills and skill levels		
4711	50	70
Agent skills and skill levels		
Agent 1	90	70
Agent 2	70	80
Agent 3	40	100

Call routing without sorting according to a skill:

Without any task flow configuration and based on the preceding settings, the system handles contacts based on the following conditions:

- Agent 1 and Agent 2 get calls related to topic 4711.
- The agent who has been available for the longest period of time receives calls first.
- Agent 3 does not get any calls for topic 4711.

Call routing with descending sorting according to a skill:

With a task flow configured with a descending sort, the system handles the contacts based on the following conditions:

- Agent 1 gets calls for topic 4711 if the agent is available.
- Agent 2 gets a call for topic 4711 only if Agent 1 is unavailable.
- Agent 3 does not get any calls for topic 4711.

Chapter 6: Agent group configuration

This chapter describes options available in the Configuration module.

An agent group consists of agents that process tasks for one or several topics. Calls are distributed to the next available agent in the group.

Note:

Some settings are valid for internal call distribution only.

You can configure a maximum of 250 agent groups for one PBX.

You can also change the name of an existing agent group using the corresponding special privileges.

Agent group field descriptions

Name	Description
Name	Displays the name of the agent.
Virtual AG	Specifies whether the agent group is a virtual agent group.
Tel	Displays whether an agent is configured for the Telephony task type .
Email	Displays whether an agent is configured for the Email task type .
Chat	Displays whether an agent is configured for the Chat task type .
PBX	Displays the PBX server of the agent.

Button	Description
Edit	Opens the selected agent. You can edit the properties.
Create	Creates a new agent.
Create Virtual AG	Creates a virtual agent group.
Copy	Copies the selected agent.
Delete	Deletes the selected agent.

Virtual agent groups

You can combine physical agent groups to form a virtual agent group. In a virtual agent group, agents are assigned indirectly.

If an agent signs in or out of a physical agent group, the agent is also signed in or out of the assigned virtual agent groups. If you configure more than one physical agent group with the same virtual agent group, the agent signs in to the virtual agent group and the first physical agent group at the same time. The agent signs out of the virtual agent group and the last physical agent group at the same time.

Creating virtual agent groups

About this task

You can create virtual agent groups in the Configuration module. You can also map agent groups to a virtual agent group.

Procedure

1. On the Agent group tab, click **Create virtual AG**.

   The Virtual agent group – Create dialog box is displayed.
2. Type a name.

   For example, `ChromeAppAG`.
3. Click **OK**.

   The virtual agent group is added to the list of agent groups.

Next steps

Map agent groups to the virtual agent group.

Mapping agent groups to a virtual group

About this task

You can map more than one agent group to a virtual agent group.

Before you begin

Create at least one virtual agent group.

Procedure

1. On the Agent group tab, click an agent group.
2. Click **Edit**.

   The system displays the Agent group-Edit dialog box.

3. In **Virtual AG**, click ... and do the following:
   a. Select a virtual agent group.
   b. Click **OK**.

   The virtual agent group you selected is displayed in **Virtual AG**.
4. Click **OK**.

   The agent group you edited is assigned to the selected virtual agent group.

Agent group assignment

The following rules apply:

- You can assign an agent to only one virtual agent group.
- A virtual agent group can work for several physical agent groups.
- The physical agent groups of a virtual agent group can be for one or more PBX.
- You can assign physical agent groups to an agent.

Priority

The priority of a virtual agent group for an agent matches the most important priority of the assigned signed-in physical agent group. The following actions change the priority of a virtual agent group:

- Changing the priority of a physical agent group.
- Signing in to or out of a physical agent group.
- Adding or removing a physical agent group for an agent.
- Configuring or deleting the assignment of a physical agent group with a virtual agent group.

Task flow set

The routing in a task flow set through a virtual agent group works the same as routing through a physical agent group. For the assignment to an agent, only one of the assigned and signed-in physical agent groups is signaled to the PBX. The PBX works with physical agent groups only.

Realtime information

The **Realtime information** area of the user interface displays the agent group-dependent real time information. For example, the real time agent status information for virtual agent groups and physical agent groups.

Agent group fields

The following sections describe the agent group fields that you can set up.

General tab field descriptions

The general settings are valid for all task types.

Name	Description
Name	Displays the full name of the selected agent group. The name must be unique. You can use maximum 29 alphanumeric characters. When you change the name of a topic, you must not use: • Percent (%) • At sign (@) • Quotation marks (“ “) • Inch mark (") • Exclamation point (!) • Backslash (\) • Angle brackets (<>) • Vertical bar (|) • Slash mark (/) • Question mark (?) • Equal sign (=) • Brackets ([ ]) • Parentheses () • Braces ({})
Task type	Displays the task types for the agent group. You can configure an agent group for the following task types: • Telephone • Email • Chat

Table continues…

Name	Description
	Note: The system displays a new tab for each task type.
Variables	Displays the variables for the virtual agent group. You can add, modify, or delete the variables for an agent group.
Virtual AG	Displays the selected virtual group for the agent group.

Telephony tab field descriptions

You can configure the respective properties if you enable an agent group for the Telephony task type.

Name	Description
Queue factor	Specifies the queue factor. The queue factor and the number of agents who sign on to the group determine the size of the agent group queue. The calls that the system cannot queue get a busy tone. You must enter the queue factor in the **Queue factor** field. The maximum value for the **Queue factor** is 50. **Note:** The queue factor is only evaluated for routing using the IP Office Contact Center system.
Ring timeout	Specifies the ring time out in seconds. If an agent does not answer a topic call within the specified ring timeout, the call moves back to the topic queue and is routed again according to the rules in the active task flow. Although the agent is signed out of all agent groups, sign out prevention is set for an assigned agent group. The **Ring timeout** is used from that agent group, which is assigned to the topic in the active task flow. **Note:** The **Ring timeout** value in IP Office Contact Center must be less than the **No answer time** in IP Office. This indicates that the call is always in the control of the routing process of IP Office Contact Center. If the **Ring timeout** in IP Office Contact Center is greater than **No answer time** in IP Office, the **Ring timeout** value in IP Office Contact Center will be ignored, and the time configured in **No**

Table continues…

Name	Description
	answer time in IP Office, with one second less, is used as ring timeout. For example, if you set the **Ring timeout** to 30 seconds, and **No answer time** in IP Office to 15 seconds, the ringing topic call will be moved back to the topic queue and the agent will be signed out after 14 seconds. The maximum value for **Ring timeout** is 120 seconds.
Sign off prevention	Displays how many agents need to remain signed on to the agent group. Only as many agents as permitted by the quota can sign off and no further agent of this agent group is allowed to sign off. The system prevents **Sign off prevention** if the ring time out exceeds. The maximum value for **Sign off prevention** is 255.
Agents	Displays the agents assigned to an agent group with priority, name, and number.
Reporting/RT Info	Displays the reporting and real time information for the agent group. For **Reporting/RT info**, you can use the default values or configure new values. **Note:** You can determine the default values by using the system settings.
Break time allowed check box	Enables agents to take breaks during sign off prevention. By default, this check box is not selected. Select the **Break time allowed** if you want to allow agents to take breaks during sign off prevention.

Email tab field descriptions

You must configure the following properties if you enable an agent group for the task type email.

Name	Description
Agents	Displays the agents assigned to the current agent group with priority, name, and number.
Reporting/Realtime information	Displays the reporting and real time information for the agent group. For **Reporting/Realtime information**, you can use the default values or configure new values. **Note:** You can determine the default values by using the system settings.

Chat tab field descriptions

Name	Description
Agents	Displays the agents assigned to the current agent group with priority, name, and number.
Reporting/Realtime information	Displays the reporting and real time information. For **Reporting/Realtime information**, you can use the default values or configure new values. **Note:** You can use the system settings to define the default values.

Chapter 7: Agent configuration

This chapter describes options available in the Configuration module.

An agent can sign in to more than one channel, and can get tasks from call center routing.

Adding agents

Procedure

1. On the Agent tab, click **Create**.

   The [Agent] – Create dialog box is displayed.
2. Enter the required settings in each tab.
3. Click **OK**.

General tab field descriptions

Name	Description
System name	Displays the name of the agent. You can assign a name with maximum 29 alphanumeric characters. The name must be unique. Do not use brackets and special characters. **Note:** User names associated with an account cannot contain spaces.
Login name	Displays the login name. The system uses the name and the password to identify an agent at login. You can assign a login name with maximum 29 alphanumeric characters. Do not use brackets and special characters. **Note:** User names associated with an account cannot contain spaces.

Table continues…

Name	Description
Alias	Displays the alias of the agent. You can use this alias with the Reporting module for anonymous reporting. The alias can contain a maximum of 29 alphanumeric characters.
Language	Specifies the language, so menus, commands, and dialogs open in the selected language.
Task type	Displays the task types for which the agent is configured. You can configure an agent for the following task types: • Telephony • Email • Chat You must enter the respective settings for each task type.
Last name	Displays the last name of the agent. You can enter a name with maximum 29 alphanumeric characters.
First name	Displays the first name of the agent. You can enter a name with maximum 29 alphanumeric characters.
Employee ID	Specifies the employee ID of an agent. You can enter the internal company code of the user. This entry is optional. You can use maximum 29 alphanumeric characters.
Cost center	Specifies the cost center of the agent. You can enter the internal company cost center of the user. This entry is optional. You can use maximum 29 alphanumeric characters.
Image	Displays an image for the agent. IP Office Contact Center supports images in `.jpg` or `.png` format with a maximum size of 50 KB per file. The recommended resolution is 120 x 120 pixels. The display of larger files might be delayed. The image you select can also be displayed in the IP Office Contact Center Web User Interface.
Title	Specifies a title for the agent. You can select either Mr. or Mrs. The selected title is passed on to the module.
Predefined profile	Specifies a predefined profile or <None> for the agent. You cannot change the group assignment and authorization of a predefined profile from this menu. You must change the settings with the Agent profile configuration.
Address book profile	Specifies which agents can read which address books and which they can import. You can also use the address book profile for telephone books.
Password	Specifies the password of the agent. Agents can change their password anytime. The password must contain at least eight characters.

Table continues…

Name	Description
	You must enter a password. For security reasons, a default password is not set. You can use any two or more of the following types of characters in the password: • Lower case letters • Upper case letters • Digits • Special characters
2. Password	Enables you to configure a password for a second person if you have the four-eye principle privilege. **Note:** The second person cannot change this password.
Variables	Displays the variables for the agent. You can add, change, or delete variables.
Skills	Displays the skills and skill levels defined for the agent. The skills of an agent are valid for all task types. You can insert, change, and delete skills. You can change a skill directly in the list by changing the name and skill level. The skill level displays how high the skills and knowledge of an agent are in a certain area. You can set minimum 0% and maximum 100% for a skill level.
Availability	Displays the conditions that must be met for each task type, so that no further tasks are assigned to an agent. You can customize the settings for an agent or use the default settings. You can determine the default settings for **Availability for Tasks** with the **System** menu.
Privileges	Enables you to update the privileges for an agent by selecting roles and defining users.
Authorization	Displays the authorizations of an agent. You can determine the topics, agent groups, agents, teams, and workplaces with which the agent can work. You can set the following options: • **Topic**: You can set the topics that the agent can use. • **Agent group**: You can set the agent groups that the agent can use. With agent group (AG) authorization, the system determines the agent groups for which an agent can process tasks if the agent has the **Select AG** privilege.

Table continues…

Name	Description
	For agents with privileges like Realtime information, Reporting, or Agent group configuration, AG authorization determines for the agent groups for which the agent can execute these functions. • **Agent**: You can set the agents that the agent can configure. The agent must have the Agent configuration privilege. • **Team**: You can set the teams that the agent can configure. • **Telephone**: You can set the workplaces that the agent can use. • **Telephone group**: You can set the which telephone group that the agent can use. • **Campaign**: You can set the campaign that the agent can edit and view in the Dialer module.

Telephony tab field descriptions

A telephone is an IP Office user. An agent with the Telephony task topic type can log in. An agent can work with a physical phone or a computer.

You can configure the respective properties if you enable an agent for the Telephony task type.

Name	Description
Telephony name	Displays the name of the IP Office user. You can use 18 alphanumeric characters.
Number	Displays the call number of the IP Office user.
Wrap Up	Displays the wrap up time in percentage for a configured topic.
Group assignment	Displays the agent groups to which the system assigns the agent or the agent profile for the Telephony or Email task types. You can use a priority between 1 to 5 for each agent group. You can select the priority directly from the list. You can add or delete agent groups. You can add a maximum of 120 groups. You can also change the order of the groups with the **Up** and **Down** buttons.
Password	Specifies the agent password for the telephone. The password can consist of maximum nine numbers.
Settings	Enables you to modify telephone settings. You can manually modify settings, or use the default settings by selecting the **Use default settings** check box.

Email tab field descriptions

Name	Description
Mail box	Displays the name of the agent mailbox. You can change the following properties of the mailbox: • **E-mail**: Displays the agent's email address. • **Reply to**: Specifies the reply address for a received email. If an agent uses the **Reply** function to reply to an email, the system uses the **Reply to** address. The **Reply to** address need not be the address of the sender. This option is primarily used to control replies to emails that the agent sends. • **From** Displays the sender address of the agent.
Group assignment	Displays the agent groups to which the agent is assigned for the Email task type. You can define a priority between 1 and 5 for each agent group. You can insert or delete the agent groups. You can add a maximum of 120 groups. You can also change the order of the agent groups using the **Up** and **Down** buttons.

Chat tab field descriptions

Name	Description
Settings	Displays the settings for the Chat task type. You can configure the following settings: • **TaskServer**: Displays the configured task server. You can select a chat task server. If a chat task server is configured, then the system automatically uses the task server. A chat task server can manage only one chat server. Only an administrator can configure a chat task server. • **Welcome text**: You can select welcome text.
Group assignment	Displays the agent groups that the agent is assigned to for the Chat task type. You can define a priority between 1 and 5 for each agent group. You can insert or delete the agent groups. You can add a maximum of 120 groups. You can also change the order of the agent groups using the **Up** and **Down** buttons.

Setting privileges for an agent

About this task

You can use privileges to control the options that an agent can access.

Procedure

1. On the Agent tab, double-click an agent.

   The system displays the [Agent]-Edit dialog box.

2. Select an option from the **Privileges** drop-down menu or click to update the privilege settings for the agent.

   Use the Agent privileges dialog box to assign privileges to an agent. The agent can only pass on privileges to other agents if the **P** check box is selected.

   The tables in the following sections show the privileges that you can set in each tab in the Agent privileges dialog box.

3. When you finish updating the privilege settings in the Agent privileges dialog box, click **Close**.

4. To activate the privileges, click **OK**.

Reporting tab descriptions

You can configure the following privileges in the Reporting module:

Name	Description
Team leader	
Reporting	Specifies that the user can start and use the Reporting module.
Topic	Specifies that the user can create reports on topics.
Agent group	Specifies that the user can create reports on agent groups.
Agent	Specifies that the user can create reports on agents.
Show alias only	Specifies that the user is only allowed to see the alias instead of the agent name in reports.
Team	Specifies that the user can create reports on teams.
Telephone	Specifies that the user can create reports on workplaces.
Trunk Line	Specifies that the user can create reports on lines.
Dialer	Specifies that the user can create reports in the Dialer module.
IVR	Specifies that the user can create reports on IVR.
Skill	Specifies that the user can create reports on skills.
System	Specifies that the user can create reports on the system.
PBXs	Specifies that the user can create reports on PBXs.
Automatic reporting	Specifies that the user can create automatic reports.
Delete data	Specifies that the user can delete the reporting data of a certain period.

Table continues…

Name	Description
Set report parameters	Specifies that the user can open predefined reports and adjust the report period.
Supervisor	
Definition	Specifies that the user can configure the file manager to create new reports.

Realtime Information tab descriptions

You can configure the following privileges for the Realtime Information module:

Name	Description
Agent	
Callback from call list	Specifies that the user can use the Callback function from the abandoned list.
Redirect	Specifies that the user can drag a new call or chat conversation from the Agent Status area for an agent group to any available agent.
Pick up	Specifies that the user can pick up calls or chat conversations from the queue or the Agent Status area for the agent group. The user must be signed in to the appropriate agent groups.
Redirect from Queue	Specifies that the user can redirect calls or chat conversations from the queue. Users can reserve tasks from the queue for themselves, or manually drag the tasks to another free agent.
Delete from call list	Specifies that the user can delete an entry from the call list in the Realtime Information module.
All agents (Authorization)	Specifies that user can view all members of an agent group or team, and all other agents, members.
Team leader	
Realtime information	Specifies that the user can start and use the Realtime Information module.
Trunk realtime information	Specifies that the user can use trunks in the Realtime Information module. **Note:** Trunk line information is not supported in IP Office Contact Center.
Remote functions	Specifies that the user can use Remote functionality.
Out of office notice	Specifies that the user can edit the out of office notice of other users.

Table continues…

Name	Description
	Note: Users also need the privilege Variable – Agents to use this function.
Agent history	Specifies that the user can use and edit user history.
Supervisor	
Configuration	Specifies that the user can create or change the private or the system-wide real time information.
Supervisor Emergency	Specifies that the user can use the **Supervisor Emergency** function. The user also needs the Configure Supervisor Emergency privilege to configure the function.
Silent Monitoring	Specifies that the user can use the **Silent Realtime information** or **Coaching** option in the telephone contact bar.

Note:

You need supervisor licenses to use Realtime Information privileges.

Task Flow Editor tab descriptions

You can configure the following privileges in the Task Flow Editor module:

Name	Description
Task Flow Editor	Specifies that the user can start and use the Task Flow Editor module.
Edit task flow set	Specifies that the user can edit a task flow set. If you do not select this privilege, the user only has read-only access.
Activate task flow set	Specifies that the user can edit and change the default task flow set. During a system failure, the IP Office Contact Center system uses the default task flow set. This default task flow set is protected separately.
Use default task flow set	Specifies that the user can define a task flow set as the default task flow set.
Edit predefined conditions	Specifies that the user can edit and change the predefined conditions. A user can edit private conditions without a special privilege.
Advanced mode	Specifies that you cannot open task flow sets with the following elements if you do not have the Advanced mode privilege: • Logic • Distributor (equal) • Distributor (cyclic)

Others tab descriptions

You can configure the following privileges for the other modules in the IP Office Contact Center system:

Name	Description
Dialer	Specifies that the user can use the Dialer module.
IVR-Editor	Specifies that the user can use the IVR Editor module.
Addressbook Admin	Specifies that the user can use the Address Book Administration module.
Task reporting	
Agent Status Reports	Specifies that the user can use non call-related user events.
Contact Detail Reports	Specifies that the user can use the Contact Detail Reports module.
Start/stop reports	Specifies that the user can start or stop the reports.

Agent tab descriptions

Name	Description
Change password	Specifies that a user can change passwords.
Change alias	Specifies that a user can change aliases. You can use the alias for reporting evaluations.
Change audio/visual notification	Specifies that a user can enable or disable notifications.
Use client via SSH	Specifies that a user can remotely connect to the IP Office Contact Center User Interface for Windows using a secure SSH tunnel.
Call divert logged-out user	Specifies that a user can activate a call routing for the time they are logged-out.
Automatic sign on	Specifies that users are automatically signed in to call distribution.
Agent group assignment	Specifies that users can assign themselves to an agent group.
Job code input	Specifies that a user can enter a job code. **Note:** The IP Office Contact Center PBX does not require this privilege. The adjustment is set in the topic.
Mandatory job code input	Specifies that the users must enter a job code for every call. **Note:** The IP Office Contact Center PBX does not require this privilege. The adjustment is set in the topic.

Table continues…

Name	Description
Outgoing job code	Specifies that the user can enter a job code for outgoing calls.
Extend wrap-up	Enables users to extend wrap up time if needed.
Chat > **Automatic sign on**	Specifies that users are automatically signed on to all assigned agent groups.
Chat > **Advanced archive view**	Specifies that users can use the chat archive.
Server-specific > **Four-eye principle**	Specifies that two people can survey certain data at the same time. You need a second password to retrieve this data. You must define two passwords in the agent configuration.

UI tab descriptions

Name	Description
Home	
Select own home file	Specifies that users can select and view their own Home screen file.
Home configuration	Specifies that users can configure real time information for all users.
Telephony	
Select own telephony file	Specifies that the user can select a telephony file.
Telephone configuration	Specifies that the user can configure the telephones for other users.
Change own contact bar	Specifies that user can change their own contact bar.
Contact bar configuration	Specifies that users can configure the contact bar for all users.
Show quick bar	Displays the quick bar.
Select own quick bar file	Specifies that users can select a file for the quick bar.
UI config	
UI configuration	Specifies that the user can use the UI Configuration module.
UI configuration application	Specifies that the user can select an active view. After starting IP Office Contact Center, the selected view starts automatically.
Configuration grid colors	Specifies that users can configure the background and text colors.
UI config.Email	Enables the Email tab in the UI Configuration module.

Table continues…

Name	Description
	You must have this privilege to configure font settings or automatic spell check.
UI config.Chat	Enables the Chat tab in the UI Configuration module.

Email tab descriptions

Note:

- The Email tab was previously called the UMR tab.
- These settings determine the email functions that you can use.

Name	Description
Email administrator	With this privilege, you can use the following functions: • **Email configuration** • **Address book administration**
Keyword based email routing	With this privilege, you can configure scripts for Email with text search keywords. The privilege **Email administrator** includes this privilege.
Textblock administrator	With this privilege, you can use the Text Block Administration module.
Email supervisor	With this privilege, you can work as a supervisor and use the following functions: In the Overview folder: • Delete emails. • Delegate emails to agents. • Delegate email to topics in the Deleted folder. In the Deleted folder: • Delegate email to a topic. In the Dictionary: • Manage • Import
Use textblocks	With this privilege, you can use text blocks in emails. The text blocks are set up using the Text Block Administration module.
Defer emails	With this privilege, you can put emails on hold. These emails are then placed in the Deferred folder.

Table continues…

Name	Description
Print emails	With this privilege, you can print emails.
Agent queue view	With this privilege, you can view the overview of the Email queue for the authorized topics. You can also select emails from the Email queue.
Delete emails	With this privilege, you can delete active emails. Later, you cannot retrieve the emails.
Automatic sign on	With this privilege, you are automatically logged into the agent group configured for you.
Email archive	With this privilege, you can access archived or completed emails in the Archive folder.
Reply as agent	With this privilege, you can select whether to reply as an agent. The system uses the corresponding email address as the address of the sender.

Configuration tab descriptions

You can configure the following privileges for the Configuration module:

Name	Description
Configuration	Specifies that the user can start and use the Configuration module.
Topic	Specifies that the user can configure topics.
Blocking periods	Specifies that the user can configure blocking periods.
Agent group	Specifies that the user can configure agent groups.
Agent	Specifies that the user can configure agent details.
Edit alias	Specifies that the user can edit alias details.
Edit Windows user account	Specifies that the user can edit the Windows user account.
Edit password	Specifies that the user can edit the password.
Agent profile	Specifies that the user can configure agent profiles.
Team	Specifies that the user can configure teams.
Skill	Specifies that the user can configure skills.
Announcement	Specifies that the user can configure announcements.
Announcement script	Specifies that the user can configure announcement scripts.
IVR	Specifies that the user can configure Interactive Voice Responses (IVR). **Note:** IVR was previously known as Voice Units.
Chat script	Specifies that the user can configure chat scripts.

Table continues…

Name	Description
Customer recognition	Specifies that the user can change and enter data for customer recognition.
External destinations	Specifies that the user can change and enter external destinations.
System	Specifies that the user can configure general system settings.
Workforce management interface	Specifies that the user can configure the interface for staff management.
Configuration report	Specifies that the user can create a configuration report.
Shift plan	Specifies that the user can configure the shift plan.
Delete statistic data	Specifies that the user can delete the statistic data.

You can also set the following service privileges in the Configuration module:

Name	Description
Reporting filters	Specifies that the user can configure reporting filters.
Special settings	Specifies that the user can configure special settings.
Telephone settings	Specifies that the user can configure telephone default settings.
PBX	Specifies that the user can configure PBXs.
Country	Specifies that the user can configure country settings.
Queue device	Specifies that the user can configure queue devices.
Telephone/Telephone group	Specifies that the user can configure telephones or telephone groups.
CHAP server	Specifies that the user can configure CHAP servers.
Access code agents	Specifies that the user can configure access codes.
Access code topics	Specifies that the user can configure access code topics.
E-mail settings	Specifies that the user can configure email settings.
Chat server	Specifies that the user can configure the settings for the chat server.
Chat settings	Specifies that the user can configure chat settings.

Variables tab descriptions

You can use the Variables privilege to determine whether the agent can configure variables for certain objects. You can also determine whether the agent can change or assign values. You can change values for the following objects in the Realtime Information module if you have the necessary privilege:

- Global
- Topic
- Agent group
- Agents
- PBXs

- IVR scripts
- External destinations

Chapter 8: Agent profile configuration

This chapter describes options available in the Configuration module.

An agent profile includes group assignments, authorizations, and privileges. You can use agent profiles to administer the settings for agents. You can use the inheritance mechanism of agent profiles as a tool, for inheritance, and for assigning the same profile to multiple agents.

If you assign a profile to more than one agent and change the settings for this profile, the settings for the agents also change automatically. You can assign the same profile to multiple agents with the same settings, and you need not configure the settings for each agent.

You can use the profile as a template to configure common settings, even if each agent uses different settings. You must assign the profile to the agent first. The system copies the settings of the profile. You must select `<None>` as the predefined profile. The system stores the profile settings. Even if you change the settings for the original profile later, the new customized settings do not change.

You can configure any number of agent profiles depending on the size of the database. You cannot delete an agent profile if one or more agents use this profile.

Note:

After the administrator modifies the agent profile, the agent must log out and exit from the IP Office Contact Center User Interface for Windows and then restart and re-log in to the IP Office Contact Center User Interface for Windows for the changes to take effect

Profile tab field descriptions

Name	Description
Name	Displays the name of the agent profile.
Telephony	Displays whether an agent profile is configured for the Telephony task type.
Email	Displays whether an agent profile is configured for the Email task type.
Chat	Displays whether an agent profile is configured for the Chat task type.

Setup of an agent profile

The following sections describe the tab fields that you can set up for an agent profile.

General tab field descriptions

Name	Description
Name	Displays the unique name of the agent profile. You can set a name with maximum 29 alphanumeric characters for the agent profile.
Task types	Displays the task type for which the agent is configured. The options are: • Telephony • Email • Chat A new tab opens for each task type and you must enter the respective settings in each tab.
Used for	Displays the agents using the profile.
Privileges	Displays the privileges of the agent profile. You can select an agent, supervisor, administrator, or user defined role.
Authorization	Displays the authorizations of the agent profile. You can determine which of the following objects can use the agent profile: • **Topic**: You can determine the topics that the agent can use. • **Agent group**: You can determine the agent groups that the agent can use. With the agent group authorization, you can determine the agent groups for which an agent can process tasks if the agent has the **Select AG** privilege. For agents with privileges such as real time information, reporting or agent group configuration, agent group authorization determines the agent groups for which the agents can run the functions. • **Agent**: You can set the agents that the agent can configure. The agent needs the Agent configuration privilege to configure agents. • **Team**: You can set the team that the agent can configure. • **Telephone**: You can set the workplaces that the agent can use. • **Telephone group**: You can set the telephone group that the agent can use.

Table continues…

Name	Description
	• **Campaign**: You can set the campaign that the agent can edit and view in the Dialer module.

Email tab field descriptions

Name	Description
Group assignment	Displays the agent groups to which the agent is assigned for the Email task type. You can define a priority between 1, which is the highest, and 5, which is the lowest, for each agent group. You can insert or delete agent groups. You can also change the order with the **Up** and **Down** buttons.

Chat tab field descriptions

Name	Description
Welcome text	Displays the configured welcome text.
Group assignment	Displays the agent groups to which the agent is assigned for the Chat task type. You can define a priority between 1, which is the highest, and 5, which is the lowest, for each agent group. You can insert or delete agent groups. You can also change the order with the **Up** and **Down** buttons.

Telephony tab field descriptions

Name	Description
Group assignment	Displays the agent groups to which the system assigns the agent or the agent profile for the Telephony or Email task types. You can use a priority between 1, which is the highest, and 5, which is the lowest, for each agent group. You can select the priority directly in the list. You can insert or delete agent groups. You can also change the order of agent groups with the **Up** and **Down** buttons.
Settings	Displays the telephone settings. If you clear the **Use default settings** check box, you can change the telephony settings.

Chapter 9: Team configuration

This chapter describes options available in the Configuration module.

A team consists of more than one agent. You can use the Realtime Information module to monitor the teams and the Reporting module to evaluate the teams.

You can do the following in a team:

- Subdivide large agent groups for real time information and reporting.
- Add the selected agents.
- Remove the selected agents.

  Note:

  You can also remove an agent from the Team members list by double-clicking the agent name.

Depending on the size of the database, you can configure any number of teams with any number of members.

Team tab field descriptions

Name	Description
Name	Displays the name of the configured teams.

Button	Description
Edit	Opens the selected team. You can edit the properties.
Create	Creates a new team.
Copy	Copies the selected team.

Editing teams

Procedure

1. In the **Name** field, click a team.

2. Click **Edit**.

   The system displays the Team-Edit dialog box.
3. Enter the required settings.
4. Click **OK**.

General tab field descriptions

Name	Description
Name	Displays the name of a team. You can use maximum 29 alphanumeric characters, excluding the following: • Percent (%) • At sign (@) • Quotation marks (“ “) • Inch mark (") • Exclamation point (!) • Backslash (\) • Angle brackets (<>) • Vertical bar (|) • Slash mark (/) • Question mark (?) • Equal sign (=) • Brackets ([ ]) • Parentheses () • Braces ({})
Team members	Displays the names of the team members. You can add agents to the team.
Other agents	Displays the names of agents who are not members of the team.

Telephony tab field descriptions

Name	Description
Realtime information settings	Displays the real time information settings. You can use or change the default settings.
Wait time threshold for TSF	Displays the wait time in minutes and seconds. You can change the default setting. The system also uses this setting for the reporting.

Table continues…

Name	Description
	You must set this value between 5 seconds and 900 seconds, that is 15 minutes. If the time that a call, email, or chat request waits in the queues is more than the specified time: • The system reports that the call waited in the queue for too long. • The Task Service Factor (TSF) value reduces.

Email and chat tab field descriptions

Email tab fields

Name	Description
Realtime information settings	Displays the real time information settings. You can use or change the default settings.
Wait time threshold for TSF	Displays the wait time in hours and minutes. You can change the default setting. The system also uses this setting for the reporting. You must set this value between 1 minute and 168 hours (7 days).
Calculating time	Displays the calculated time. You can change this value with the Realtime Information default values.

Chat tab fields

Name	Description
Realtime information settings	Displays the real time information settings. You can use or change the default settings.
Wait time threshold for TSF	Displays the wait time in minutes and seconds. You can change the default setting. The system also uses this setting for the reporting.
Calculating time	Displays the calculated time. You can change this value with the Realtime Information default values.

Chapter 10: Customer recognition configuration

This chapter describes options available in the Configuration module.

The agents in the IP Office Contact Center system get preliminary information about the caller through the customer recognition feature. The system uses the number and the email address to identify a customer. It then searches in the database for customer information and provides this information to the agent. You can configure any number of customer entries depending on the size the database.

Adding customer details

Procedure

1. On the Customer tab, click **Create**.
2. Enter the required settings.
3. Click **OK**.

   The system displays the configured customer entry in the list of customer entries.

Customer Edit field descriptions

Name	Description
Name	Displays the name of the customer. You can enter a name with maximum 40 alphanumeric characters.
Customer no	Displays the number of the customer. You can assign a number with maximum 29 alphanumeric characters.
Priority	Displays the priority of the customer. The priority is appended to the message, a call or an email. You can evaluate this priority with the task flow processing for the call routing process and route the call accordingly. For example, you can assign a higher priority to more important customers.

Table continues…

Name	Description
Company entry	Specifies that the system recognizes a customer if the customer uses the configured numbers or email addresses. • Valid for the type Telephony: You can e.g. enter a company number for a company (e.g. 0071113586) and in addition enter individual employees with their full numbers (007111358612). If a full number is entered this customer is displayed even if the company number is recognized. • Selected: Recognizes a customer by the company number. If the number matches the beginning of a company number the respective company is displayed as customer. • Not selected: Recognizes a customer by his full number. • Valid for the type Email: You can e.g. enter a company email address (e.g. comergo.com) and in addition enter individual employees with their full email addresses e.g. (heinz.schmidt@ comergo.com). If a full email address is entered this customer is displayed even if the company email address is recognized. The characters after the @ are usually used for a company email address. • Selected: Recognizes a customer by the company email address. If the email address matches the company email address the respective company is displayed as customer. • Not selected: Recognizes a customer by his full email address
Numbers/emails	Displays the numbers and emails addresses that you can use to identify a customer. This field displays the following information: • **Number or email** • **Type** • **Kind**
Personal contact/ topic	Displays the personal contacts and topics. This field displays the following information: • **Name of agents or topics** • **Number** • **Email** • **Dial-in topic** You can add or delete personal contacts, such as agents or personal topics.

Adding an agent as a personal contact

Procedure

1. On the Customer tab, click a name.
2. Click **Edit**.

3. In the **Personal contact/topics** field, click **Add agents**.

   The system displays the Select personal contact for customer dialog box with the list of agents and the name, task type, number, and PBX of each agent.

   Note:

   If you select a PBX and task type, the system displays only agents matching the PBX and task type.

4. Click **OK**.

   The system displays the selected agent in the **Personal contact/topics** field.

5. Click **OK**.

   The system saves the agent as a personal contact.

   Note:

   You can use a topic as the personal contact so that the call will be rerouted in the task flow to that specific topic. For example, if a caller has outstanding bills, the caller will be always redirected to the account department until his bill is paid off.

Assigning Dial-in topics

Procedure

1. On the Customer tab, click a name.
2. Click **Edit**.
3. In the **Personal contacts/topics** field, click a contact.
4. Click **Dial-in topic**.

   The system displays the Assign topic dialog box with the list of topics and the name, task type, number, and PBX of each topic.

   Note:

   If you select a PBX and task type, the system displays only topics matching the PBX and task type.

5. Click **OK**.

   Note:

   If you select a Dial-in topic, then the personal contact will be used only if the customer has dialed into the selected topic.

Import customers overview

You can import customer data using two files, an import file that contains the data records and a control file that controls the import. You can specify whether:

- The imported data must replace the existing customer data.
- The system must add the imported data to the existing data.

The import file

The import file contains the data records of the customers. You can only use a semicolon to separate the data in a record. The extension of an import file is `.csv`.

The control file

The control file contains the entries required to control the importing of customer data. The entries in the control file must match the entries in the import file. The extension of a control file is `.txt`.

Control file field descriptions

Setting	Type	Maximum record length	Description
NOP	–	–	Specifies that the system does not import this column in the record.
Name	Mandatory	19	Displays the name of the customer.
Prio	Optional	1	Displays the priority of the customer. The default value is 1.
IsCompany	Optional	1	Specifies whether the entry is a company address.
CustomerNo	Optional	19	Displays the number of the customer.
AgentNumber	Optional	29	Displays the number of the agent.
Agent	Optional	29	Displays the name of the agent. You can import more than one agent as the personal contact. **Note:** The name of the agent that you use as a personal contact must be same as the name that the IP Office Contact Center system uses. If the names do not match, the system does not import the personal contact.
TopicNumber	Optional	29	Displays the number of a topic.
Topic	Optional	29	Displays the name of a topic.
BusinessPhone	Mandatory	128	Displays the business number of the customer.

Table continues…

Setting	Type	Maximum record length	Description
BusinessEmail	Optional	128	Displays the business email address of the customer.
BusinessFax	Optional	128	Displays the business fax number of the customer.
PrivatePhone	Optional	128	Displays the home number of the customer.
PrivateEmail	Optional	128	Displays the home email address of the customer.
PrivateFax	Optional	128	Displays the home fax number of the customer.
MobilePhone	Optional	128	Displays the mobile number of the customer.
MobileEmail	Optional	128	Displays mobile email address of the customer.
MobileFax	Optional	128	Displays mobile fax number of the customer.
PhoneNumber	Optional	128	Displays the earlier settings for the business phone number. For compatibility issue with legacy customers, PhoneNumber is mapped to BusinessPhone.
InTopic	Optional	29	Displays the Dial-in topic.

Importing customer data automatically

About this task

You can schedule a time to import customer data automatically. The Configuration module imports the customer data automatically at the configured intervals.

Before you begin

- Create an import file with the same name as the control file.
- Save the import file and control file in the same folder.

Procedure

1. On the Customer tab, click **Auto import**.

   The system displays the Import Customer Data Automatically dialog box.

2. Select **Enabled**, and do the following:

   a. Click **import file**.

   b. Click a file.

   c. Click **Open**.

      The system selects the file and displays the details in the **Import file** field.

   d. To ignore the errors while importing a file, select **Ignore import errors**.

   e. To select a mode for importing, in the **Mode** field, select one of the following options:

      - **Replace existing customer data**

- **Add imported customer data to existing data**

f. To select an interval for the automatic import, in the **Time** field, select one of the following options:

- **Daily**
- **Weekly**
- **Cyclically**

You must use the hours:minutes (hh:mm) format.

3. Click **OK**.

The system imports the customer data automatically at the specified time.

A  indicator is displayed when automatic import is enabled.

Import Customer Data Automatically field descriptions

Name	Description
Enabled	Specifies whether automatic import of customer data is enabled.
Import file	Specifies the name of the import file.
Ignore import errors	Specifies whether the Configuration module ignores the errors during import.
Mode	Specifies the import mode. The options are: • **Replace existing customer data**: The Configuration module deletes all existing customer data and creates new customer data when importing a file. • **Add imported customer data to existing data**: The Configuration module updates the existing customer data. If the system imports the customer data with an existing number, the Configuration module overwrites the existing data.
Time	Specifies the interval for the automatic import. The options are: • **Daily**: The import starts every day at the configured time. • **Weekly**: The import starts every week on the configured day and at the configured time. • **Cyclically**: The import starts at the specified time.

Chapter 11: External destination configuration

This chapter describes options available in the Configuration module.

You can use any external number as the external destination. For example, you can use a mobile number or topic number of another call center as the external destination.

You can use external destinations in the Task Flow Editor module or as call recording destinations in the contact bar. You can configure the properties of an external destination to forward a message as a text message or fax. You can configure any number of external destinations.

Delay time

You can set a delay time for a busy external destination. During this time, the task flow process does not access the destination. For example, if a task flow process routes a call to a busy external destination, the process cannot access the external destination for the configured delay time.

External destination tab field descriptions

Name	Description
Name	The name of the external destination.
Task type	The task type of the external destination.
Number/email	The number or email address of the external destination.

Button	Description
Edit	Opens the selected external destination. You can edit the properties.
Create	Creates a new external destination.
Copy	Copies the selected external destination.
Delete	Deletes the selected external destination.

Adding external destinations

Procedure

1. On the External destination tab, click **Create**.
2. Enter the required settings.
3. Click **OK**.

   The system displays the configured external destination in the list of external destinations.

External destination properties field descriptions

Name	Description
Name	Displays the name of the external destination. You can use maximum 29 alphanumeric characters excluding the following: • Brackets • Special characters
Task type	Displays the task type of the external destination. If the destination is busy: • For the Telephony task type: You must set the number and the delay time. • For the E-mail task type: You must enter the email address.
Task type: Telephony	
Number	Displays the number of the external destination. You can use maximum 25 digits. **Note:** You must take the access code into account for the external destinations.
Delay time if destination is busy	Displays the delay time. The minimum delay time is 1 second and the maximum delay time is 1 hour. The default value is 5 seconds. You can select the **delay time if dest. busy** option only for the Telephony task type. The delay time defines the duration that the system blocks the external destination for the task flow processing.
Task type: Email	
Email	Displays the email address of the external destination. You can use maximum 25 characters.

Button	Description
Variables	Displays the defined variables.

Chapter 12: Announcement and announcement script configuration

This chapter describes how to configure announcements and announcement scripts in the Configuration module.

Announcement configuration

You can assign announcements to direct incoming calls or transferred calls to the topic. The direct incoming calls are the calls dialed to the selected topic. The transferred calls are the calls that were originally dialed to another topic and the agent or the call distribution system transfers to the current topic. You can select one of the following options while adding an announcement:

- Announcements managed by the VEA process
- IVR scripts managed by the Voice control process

You must configure the announcement texts first. You must configure the following information for the selected type of announcement text assignment:

- Number
- Name
- Interruptible

You can insert, delete, play, and change the sequence of the announcement texts. You can use the announcement feature only for the Telephony task type.

Configuring one-time announcements

About this task

You can configure and use one-time announcement scripts in the task flow sets. A one-time announcement script has an exit connector. However, you can determine an alternative task flow with the task flow set.

When you configure a one-time announcement script, you must add at least two announcement texts to the script. The first announcement must consist of the text, for example, a welcome text.

This announcement must be uninterruptible. You can use two or more announcement texts, but the last announcement, silence, must not contain text and must be interruptible.

Procedure

1. On the Announcement script tab, click **Create**.
2. In the **Name** field, type a name.

   Note:

   Do not use more than 22 characters if you are using the announcement script for a one-time announcement. When you create an announcement script , the system creates a tag with the name `Script_<Name>`. This tag consists of maximum 29 characters. Therefore, if you use more than 22 characters for the one-time announcement script, you cannot activate the task flow that uses the script.
3. In the **At the end of script** field, select the **Repeat last text** check box.
4. In the **Announcement text** field, add announcement text.
5. Click **OK**.

   The system displays the configured one–time announcement script in the list of announcement scripts.

Creating announcement scripts

About this task

You must create announcement scripts to use announcement text in the Task Flow Editor. The Task Flow Editor uses the announcement scripts for task flow processing.

An announcement script can consist of multiple announcement text files. The system plays the announcement text files to the caller one after the other. After playing all text in the list, the system repeats the last text until an action, such as a call being connected to a free agent, stops the replay. You can change the order of text files in the list anytime.

Procedure

1. On the Announcement script tab, click **Create**.
2. Enter the required settings as described in Announcement script field descriptions on page 88.
3. Click **OK**.

   The system displays the configured announcement script in the list of announcement scripts.

Announcement script field descriptions

Option	Description
Name	In this field, enter the name of the announcement script. You can use maximum 29 alphanumeric characters excluding the following: • Brackets. • Special characters such as the at sign (@), quotation marks (“ “), percentage (%), exclamation point (!), backslash (\), and angle brackets (<>). • IVR scripts with the same name. You must create IVR scripts with unique names. Do not use more than 22 characters if you are using the announcement script for a one-time announcement. When you create an announcement script , the system creates a tag with the name Script_<Name>. This tag consists of maximum 29 characters. Therefore, if you use more than 22 characters for the one-time announcement script, you cannot activate the task flow that uses the script.
Welcome announcement	Select this check box if you want the announcement script to be used as a welcome announcement. If you select this check box, the system does not use this time to calculate the wait time in the reporting.
Free of cost	Select this check box if you want the announcement script to be free for the caller.
At the end of script	You can select one of the following: • **Repeat last text**: After playing all announcement texts, the system repeats the last text until an action stops the replay. For example, the system connects the call to a free agent. • **Automatic stop**: After playing all announcement texts, the system stops the announcement.
Announcement texts	In this section, you can add, change, or delete announcement text. You can also use the **Up** or **Down** buttons to rearrange items in the list. The interruptible status specifies whether the system can interrupt the announcement text. For example, if an agent is available during an interruptible announcement or music, the system can assign the call to the agent.

Announcement text configuration

When you create or edit an announcement script, you can click **Add/Change** to add or edit announcement text. When you add new announcement text, you are prompted to select a PBX for the announcement if multiple PBXs are configured. To configure the text, you must complete the required fields as described in Announcement text tab field descriptions on page 89.

Announcement text tab field descriptions

Option	Description
Name	Enables you to enter the name of the announcement text. You can enter a name for a new announcement text or change the name of an existing text with maximum 29 alphanumeric characters. If a text with the same name already exists, the system overwrites the existing announcement text.
Text number	Displays the sequential number of the announcement text.
Sound file	Enables you to select a sound file. You can only use `.wav` files.
Duration	Displays the length of the announcement text in minutes and seconds.
Interruptible	If this check box is selected, the announcement is interruptible. For example, if an agent becomes available during the announcement or music, the agent can interrupt the announcement.
Comment	Enables you to enter a comment, such as a description for the announcement text.
Status	Displays the state of the announcement text. The different states are: • Not transferred • No `.wav` file was transferred for this text number • The transfer of the `.wav` file was interrupted • Transferred • Transfer completed without errors • Newly transferred • An old `.wav` file was replaced by a new file The following `.wav` formats are supported: PCM 8 kHz, 16 bit, Mono.

Chapter 13: Workplace configuration

A workplace lets you assign a computer and telephone to a specific workstation. You can configure any number of workplaces. The Workplace tab in the Configuration modules lists all configured workplaces. The list includes:

- The name of each workplace.
- The terminal name and type for the workplace. The terminal type can be Personal Computer (PC) or Network Computer (NC).
- The telephone number.
- The PBX to which the telephone is connected.

Use the information in this chapter to set up an agent on a terminal server.

Terminal server installation

You must install the user interface as an RPC connection on the terminal server.

An agent on a computer starts a terminal server session on a terminal server. A telephone is assigned to the agent.

Setting up a workplace on a terminal server

Procedure

1. Click the Workplace tab.
2. Click **Create**.

   The system displays the Workspace Configuration — Create dialog box.
3. Enter a name and any other required information.
4. Select the **Terminal workplace** check box.
5. Select **NC**.
6. Enter the NC name in all caps. Optionally, you can enter the required information.
7. Select a telephone.

8. Click **OK** to save the settings.

   The workplace is set up and appears in the list.

Remote client logging in

Each remote client must be logged in with its own separate account. If this is not done, the different client sessions and accounts logged in to the terminal server can influence each other, as described in the following examples:

Example 1

`testuser` is logged in to the terminal server and also logged in to the remote client. If the user interface starts on the remote client, it also starts on the terminal server.

Example 2

If the same remote account is logged in to multiple terminal sessions, starting the user interface on one terminal client also starts the client on all corresponding sessions.

TTrace usage

If you use the trace system (TTrace), a remote client name is displayed in the trace system output when an agent is logged in. The following is a TTrace log output example:

```
A5448c 10:00:25.813 TC_General           #++++++++++++++++++++++++++++++++++++++++++++
+#
A5449c 10:00:25.813 TC_General           #++++ workplace
A5450c 10:00:25.813 TC_General           #++++
A5451c 10:00:25.813 TC_General           #++++ hostname:               AMARILLO
A5452c 10:00:25.813 TC_General           #++++ ip-address:             135.124.109.42
A5453c 10:00:25.813 TC_General           #++++ TerminalServer:         true
A5454c 10:00:25.813 TC_General           #++++   TerminalServerClient:  true
A5455c 10:00:25.813 TC_General           #++++ workspace:              STU111273
A5456c 10:00:25.813 TC_General           #++++   screenDeviceHost:     STU111273
A5457c 10:00:25.813 TC_General           #++++   screenDeviceId:       69ba2a5403010000
A5458c 10:00:25.813 TC_General           #++++   terminal:             225
A5459c 10:00:25.813 TC_General           #++++   pabx:                 PBXServer
A5460c 10:00:25.813 TC_General           #++++
A5461c 10:00:25.813 TC_General           #++++++++++++++++++++++++++++++++++++++++++++
+#
A5462c 10:00:25.813 TC_General           #++++++++++++++++++++++++++++++++++++++++++++
+#
A5463c 10:00:25.813 TC_General           #++++ loggedIn agent
A5464c 10:00:25.813 TC_General           #++++
A5465c 10:00:25.813 TC_General           #++++ login name:            Supervisor
A5466c 10:00:25.813 TC_General           #++++ system name:           Supervisor
A5467c 10:00:25.813 TC_General           #++++ agentId:               3b39825242004700
A5468c 10:00:25.813 TC_General           #++++   terminal:            225
A5469c 10:00:25.813 TC_General           #++++   terminalId:          3e39825243004a00
A5470c 10:00:25.813 TC_General           #++++
A5471c 10:00:25.813 TC_General           #++++++++++++++++++++++++++++++++++++++++++++
+#
```

The same information is also displayed with the following TTrace commands in the TTrace console:

```
ccui_workplace
ccui_loggedInAgent
```

Note:

With the first login from a computer, the workspace entry will be created automatically. If a user logs in through a Remote Desktop Connection on a computer, the delivered host name is like a login from the terminal server. It is not the name of the computer where the IP Office Contact Center UI is running, but the name of the computer where the Remote Desktop Connection was started. To avoid an incorrect workspace, use the -noTerminalServerClient parameter, with the minus sign (-) included, to start the IP Office Contact Center UI. Create a shortcut on the remote computer and add this parameter to **Properties** in the **Target** field. For example: `C:\Program Files (x86)\Avaya\IP Office Contact Center\User Interface\AvayaCCMain.EXE" -noTerminalServerClient`.

Chapter 14: IVR configuration

This chapter describes options available in the Configuration module.

An Interactive Voice Response (IVR) unit adds features, such as announcements, speech recognition, and DTMF dialing interactions, to IP Office Contact Center.

Note:

Speech recognition is not supported in IP Office.

The IVR unit creates scripts with corresponding software. To access the scripts, you can use the Voice Control (VC) process that runs on the IP Office Contact Center server. You can also use the scripts in task flow processing.

IVR tab field descriptions

Name	Description
Name	The name of the Interactive Voice Response (IVR).
PBX	The PBX in which the system configures the IVR.

Button	Description
Edit	Opens the selected IVR. You can edit the properties.
Create	Creates a new IVR.
Copy	Copies the selected IVR.
Delete	Deletes the selected IVR.

Creating IVR scripts

Procedure

1. On the IVR tab, click **Create**.
2. Enter the required settings.
3. Click **OK**.

The system displays the configured IVR script in the list of IVR scripts.

IVR configuration field descriptions

Name	Description
Name	Specifies the name of the Interactive Voice Response (IVR). You can assign a name with maximum 29 alphanumeric characters.
Type	Specifies the type of IVR. The default type is **Voice Control**.
Host	Displays the host name of the IVR. You can also use the IP address.
Mail Server	Specifies the host name of an SMTP-capable mail server. The IVR uses this mail server to send voice mails through emails.
Default script	Displays the standard script. If an error in the active IVR script occurs or a variable is not defined, the IVR starts this script.

Button	Description
Scripts	Displays the configured IVR scripts.
Voice mails	Displays the configured voice mails with the following details: • **Date or Time** • **Done** • **Type** • **Name** • **Customer** • **Length** • **Topic** You can view the tags stored for the voice mail by clicking the **Details** button. You can also delete a voice mail.

Scripts

The scripts provides the following information:

- **Name**
- **Type**
- **Welc.**
- **Accessible**

IVR Scripts tab field descriptions

Name	Description
Name	Displays the name of the IVR.
Type	Displays the type of IVR. The types are: • **Undefined** • **Announcement** • **Welcome announcement** • **Automatic agent**
Accessible	Specifies whether the IVR is accessible. The options are: • **Yes** • **No**

Button	Description
Properties	Displays the configured properties of the IVR. You can use the IVR Editor module to define the settings for an IVR script. The default type is Announcement.

Chapter 15: Break time configuration

This chapter describes options available in the Configuration module.

Use the information in this chapter to configure break codes, which agents use when taking breaks.

Important:

The Break Time codes tab is visible only if the option **Use Break Time codes** in the System settings is checked.

Editing break time codes

Procedure

1. On the Break Time code tab, click a break time code.
2. Click **Edit**.
3. In the **Break Time** field, enter a name.
4. Click **OK**.

   The system displays the name of the break time in the list of break time codes.

Break Time code tab field descriptions

Name	Description
Name	The name of the break time code.

Button	Description
Edit	Opens the selected break time code. You can edit the properties.
Create	Creates a new break time code.
Delete	Deletes the selected break time code.

Chapter 16: PBX configuration

This chapter describes options available in the Configuration module.

In IP Office Contact Center, you can configure any number of PBXs.

PBX tab field descriptions

The PBX tab lists all the configured PBXs.

Name	Description
Name	The name of the PBX.
Abbreviation	The abbreviation of the PBX.
Location	The location of the PBX.
Type	The type of the PBX.
Version	The version of the PBX.

Button	Description
Edit	Opens the selected PBX. You can edit the properties.

PBX edits

The following sections describe what you can edit for a PBX.

General settings field descriptions

Name	Description
Name	Displays the name of the private branch exchange (PBX). You must use a unique name within the IP Office Contact Center system.
Abbreviation	Displays the abbreviation of the PBX.

Table continues…

Name	Description
	This setting is optional.
Location	Displays the location of the PBX. This setting is optional.
Color	Displays the color of the PBX. The modules of the IP Office Contact Center system uses this color to display the PBX.
Type	Specifies the type of the PBX.
Version	Specifies the version of the PBX. The kernel process requires this information.
System Password	Specifies the password that is required to start a connection with IP Office. This password is the system-generated password of IP Office.
PBX access	Displays the configured PBX access.
Task server	Displays the general properties of a task server.
Display Login/Logout messages at agent phone	Specifies whether to display the login or logoff messages at the user's phone. By default, this option is not selected.
Access code for dialer	Displays the access code for external connections for mechanical dialers. The external line code is a special code that the system uses within the PBXs to seize the external lines and for the numbers of the dialer campaigns. If you prefix this code, PBX can seize specific lines. **Note:** You need not adjust the number of dialer campaigns. For the dialer parameters of a dialer campaign or topic, you cannot use the **Mark call as ACD call** option or the external line code.
Access code for external OutCC	Displays the access code for external callback.
Access code for internal OutCC	Displays the access code for internal callback.
Access code for address book server	Displays the access code for address book server. The agents use the address book as the telephone book.
Access code	Displays the configured access codes. You must enter an access code for the preview, direct, and agent dialers. You can configure any number of access codes. You can insert, change, or delete access codes for the preview, direct, and agent dialers. To use this access code, you must assign the access code in the campaign configuration in the Dialer UI.
Conf access	Specifies the IP address of IP Office, the port, credentials, and sync interval.

Editing PBX access

About this task

You can use several Module Managers on different personal computers for accessing a PBX. Depending on the Module Managers that you use to access PBX, you must configure the connections with the PBX.

Procedure

1. Click **PBX** > **Edit** > **PBX access**.
2. In the PBX Access dialog box, do one of the following:
   - To create a new PBX access, click **Add**.
   - To delete a selected PBX access, click **Delete**.
   - To edit a PBX access, type the following values:
     - **Host name**
     - **Port**
3. Click **OK**.

   The system saves the configuration.

PBX access field descriptions

Name	Description
Host name	Specifies the name or TCP/IP number of IP Office.
Port	Specifies the socket port of the respective Module Manager. The default socket port is `50797`.

Conf. access field descriptions

Name	Description
IP address	Specifies the IP address of IP Office.
Port	Specifies the port used for IPO500V2 and IPOL (Server Edition). The ports are: • IPO500V2: 8443 • IPOL (Server Edition) : 7070
User	Specifies the user name with privileges to configure in IP Office. For example, administrator. This user can create an explicit account in IP Office. For example, IPOSyncService, which is used only for the synchronization process.

Table continues…

Name	Description
Password	Specifies the user password . You can use maximum 29 alphanumeric characters.
Synch interval	Displays the interval settings. The default setting is 2 minutes.

Adding external lines

Procedure

1. On the PBX tab, click **Create**.

   The system displays the PBX Configuration – Create dialog box.
2. Click **Ext trunk line**.

   The system displays the Ext Trunk dialog box.
3. Click **Create**.

   The system adds a new external line configuration to the list of external line configurations.
4. Select the external line configuration, and enter the following details:
   - **Country**
   - **Area code**
   - **PBX number start**
   - **PBX number stop**
   - **Number of local digits**
5. Click **OK**.

   The system saves the external line configuration.

Deleting external lines

Procedure

1. In the Ext Trunk dialog box, click a country setting.
2. Click **Delete**.

   The system displays the following message:

   `Do you really want to permanently delete the selected objects?.`
3. Click **Yes**.

   The system deletes the selected external line.

External trunk line field descriptions

The External line tab displays the list of all configured external lines.

Name	Description
Country	Displays the name of the selected country. The default value is Germany.
Area code	Displays the area code. For example, 07191.
PBX number start	Displays the start number for the PBX. For example, 3586-00.
PBX number stop	Displays the stop number for the PBX. For example, 13586-99.
Number of local digits	Displays the number of local digits. Local digits belong to the local call number stock of the PABX domain. For example, if a PABX number starts at 1321 and ends at 1385, the number of local digits is 2. If you enter only one PABX starting number, the number of local digits is 0.

Button	Description
Cancel	Cancels an action.
Create	Creates a new external line.
Delete	Deletes the selected external line.

Editing the properties of task servers

About this task

You can edit the general properties of a task server.

Procedure

1. On the PBX tab, click a **PBX**.
2. Click **Edit**.

   The system displays the PBX Configuration Edit dialog box.
3. Click ....

   The system displays the Task server Edit dialog box with the General and Assignment tabs.
4. On the General tab, enter the following details:
   - **Name**
   - **Host name**
5. Click **OK**.

The system saves the configuration and displays the name of the task server in the **Task server** field.

General tab field descriptions

Name	Description
Name	Displays the name of the task server.
Host name	Displays the network computer name of the task server.
Session ID	Displays the session ID of the task server. The session ID setting is different when the **PBX** connects to multiple task servers. You cannot edit this value.
Start time	Specifies the starting time of the task server. You cannot edit this value.
Version	Displays the current version of the task server. You cannot edit this value.

Assignment tab field descriptions

Name	Description
Assigned applications	Displays the name of the assigned applications. You must add a voice extension adapter to the list. You can edit the properties of an assigned application.
Other applications	Displays the name of other applications.

Chapter 17: Country setting configuration

This chapter describes options available in the Configuration module.

You can use the country setting feature to configure the name of the network provider and assign the provider to a country. You can also configure the national and international code for each country.

Country tab field descriptions

The country setting tab displays provider data.

Name	Description
Name	Displays the name of the network provider. For example, Deutsche Telecom AG, or Arcor.
Country	Displays the country name for the country setting.
Country code	Displays the country code. For example, 49 for Germany, 33 for France, and 39 for Italy.
National code	Displays the national code for the country setting. For example, 0.
International code	Displays the international code for the country setting. For example, 00.
Area code used	Specifies whether the user must dial the area code for the country setting. For example, you must dial the area code in Spain.

Button	Description
Edit	Opens the selected country setting. You can edit the properties.
Create	Creates a new country setting.
Delete	Deletes the selected country settings.

Adding country settings

Procedure

1. On the Country tab, click **Create**.

   The system displays the Country setting – Create dialog box.
2. Enter the following details:
   - **Name**
   - **Country**
   - **Country code**
   - **National code**
   - **International code**
3. Select the **Use area code** check box.
4. Click **OK**.

   The system displays the country setting in the list of country settings.

Editing country settings

Procedure

1. On the Country tab, do one of the following:
   - Double-click a country setting.
   - Click a country setting, and then click **Edit**.

   The system displays the Country setting-Edit dialog box.
2. Enter the following details:
   - **Name**
   - **Country**
   - **Country code**
   - **Long**
   - **International code**
3. Select the **Use area code** check box.

   The system updates the country settings.

Deleting country settings

Procedure

1. On the Country tab, click one or more country settings.
2. Click **Delete**.
3. Click **Yes**.

   The system permanently deletes the selected country settings.

Chapter 18: Queue devices configuration

This chapter describes options available in the Configuration module.

A queue device receives incoming calls until one of the agents is available to receive the calls.

Queue device tab field descriptions

Name	Description
Number	Displays the queue device number. You can use maximum 15 characters.
PBX	Displays the PBX for the number.
Active	Specifies whether the system uses the CHAP configuration to set up the number. The X sign specifies that the system uses the CHAP configuration to set up the number.

Button	Description
Create	Creates a new number block.
Delete	Deletes the selected numbers.

Adding queue devices

About this task

The Queue device tab displays the assigned numbers and the associated PBX for a queue device. PBX uses this number to assign a queue device to a queue. You must configure queue devices to use the queues.

Procedure

1. On the Queue device tab, click **Create**.

   The system displays the Select a PBX for the queue device dialog box.

2. Click a **PBX**.

3. Click **OK**.

   The system displays the Queue device – Create dialog box.

4. In the **Start no** field, enter the first number.
5. Click **End no**.

   The system populates the end number automatically. This number is the same as the number entered in the **Start no** field.

6. Click **OK**.

   The system adds a queue device to the list of queue devices.

Deleting queue devices

Procedure

1. On the Queue device tab, click the numbers.
2. Click **Delete**.
3. Click **Yes**.

   The system deletes the selected numbers.

Chapter 19: Telephone configuration

This chapter describes options available in the Configuration module.

A telephone is an IP Office user. Agents with the Telephony task type can log in.

Telephone tab field descriptions

The Telephone tab lists the configured telephone numbers. You can use the Telephone tab to specify the available agents. You must enter the number of the IP Office user, but not the extension number.

Name	Description
Number	The number of the IP Office user. You can use maximum 15 numbers.
PBX	The private branch exchange for the number.
Name	The configured name. You can also use this name for the Telephone status of the telephone group or grid in the Realtime Information module.

Adding telephone configurations

Procedure

1. On the Telephone tab, click **Create**.
2. In the dialog box, select a **PBX**.
3. Click **OK**.

   The system displays the Telephone – Create dialog box.
4. In the **Start no** field, enter the first number.
5. Click **End no**.

   The system populates the end number automatically. This number is the same as the number entered in the **Start no** field.
6. Click **OK**.

Deleting telephone configurations

Procedure

1. On the Telephone tab, select the number of the telephones that you want to delete.
2. Click **Delete**.

Chapter 20: Telephone group configuration

This chapter describes options available in the Configuration module.

You can use a telephone group to get real time information about the group.

You can monitor the status of each telephone or telephone group. A telephone group can consist of all employees within a single department. Each telephone in the group includes an indicator, which changes color based on the status of the telephone. The telephone number is also displayed. A tool tip displays the name of the agent when an agent logs in.

Telephone group tab field descriptions

Name	Description
Name	The name of the telephone group. You can assign a unique name in the IP Office Contact Center system with maximum 29 alphanumeric characters.
Number of Telephone groups	The number of telephone groups in the system. The number of telephone groups is unlimited.

Button	Description
Edit	Opens the selected telephone group. You can edit the properties.
Create	Creates a new telephone group.
Copy	Copies a selected telephone group.
Delete	Deletes a selected telephone group.

Creating telephone groups

Before you begin

- Get the privilege and required permission for the telephone or telephone group.

Procedure

1. On the Telephone group tab, click **Create**.

The system displays the [Telephone group] - Create dialog box.

2. Enter the following details:
   - **Name**
   - **Assigned phones**
3. Click **OK**.

   The system displays the telephone group in the list of telephone groups.

Chapter 21: CHAP server configuration

This chapter describes options available in the Configuration module.

Use this information in this chapter to configure the Common Hardware Abstraction Platform (CHAP) server.

CHAP server

The CHAP server tab lists the known CHAP servers and host names.

Button	Description
Edit	Opens the selected CHAP server. You can edit the properties.
Create	Creates a new CHAP server.
Delete	Deletes a selected CHAP server.

Editing CHAP servers

Before you begin

Ensure that the VEA and CHAP Synchronization processes are running.

Procedure

1. On the CHAP server tab, click a CHAP process.
2. Click **Edit**.

   The system displays the CHAP - Edit dialog box.
3. Enter the required settings.
4. Click **OK**.

   The system adds the server to the list of CHAP servers.

General tab field descriptions

Name	Description
Name	The name of the CHAP server.
Host name	The network computer name of the CHAP server. You cannot change the existing host name because it is linked to IVR, VEA, and IPO task server. You can assign a new name after creating a new server.
SessionId	The session ID of the CHAP server. If more than one CHAP server is connected to the PBX, the system displays the session ID for each CHAP server.
Starting time	The starting time of the CHAP server.
Version	The current version of the CHAP server.

IPO Chap Access tab field descriptions

Name	Description
Info	General information. The default setting is **Topics and Queue Devices**.
SIP extension	The SIP extension used for the CHAP connections in IP Office. The default value is 699.
User Agent	The user name. The default setting for **User Agent** is **Avaya CIE**.
Login Code	The login code. **Note:** For the SIP extension, you can also set this value in the **Telephony** > **Supervisor Settings** field in the IP Office manager.
Start number and **End number**	The range for the call number for topics, queue devices, and IVRs. The range of call numbers must not overlap.

Properties tab field descriptions

Name	Description
DNSServerIP	Displays the IP address of the network domain name server.
LocalDomainName	Displays the local unified domain name. This name is independent of existing domain names. You can assign a new name, which must be the same as the name defined in IP Office. The system uses this name within Session Initiation Protocol (SIP) to identify the

Table continues…

Name	Description
	Common Hardware Abstraction Platform (CHAP) system as a PBX within SIP. The user can assign a name depending on the PBX network. For example, `avaya.com`.
LocalHostName	Displays the local host name. For example, `ipoccsystem`.
LocalIPAddress	Displays the IP address of the server that runs the CHAP.
LocalRTPPortRange	Displays the range of port numbers used by the CHAP server for the RTP connections. The default ports are port 14000 to port 15000. You must assign 4 ports for each channel. If a port is already assigned to a channel, the system uses the next available port.
LocalSignalPort	Displays the far-end listen port of the associated IP Office. The default port is port 5100.
PBXDomainName	Displays the PBX domain name. This name must be the same name as in IP Office. The name of the SIP Domain must be the same as in the IP Office manager at `system/LAN1/VOIP`. You must use lowercase letters.
PBXIPAddress	Displays the IP address of the SIP trunk Ethernet connection in IP Office.
PBXPingPeriod	Displays the time between two pings in milliseconds. If the ping period is 0, the system deactivates ping.
PBXSignalPort	Displays the near-end listen port of the associated signaling group in IP Office.
RTPPayloadType	Identifies RTP packets in the media stream. RTP packets contain DTMF data as described in RFC2833. This configuration must match the IP Office DTMF settings. Otherwise, DTMF digits will not be recognized.
SRTP	Specifies the value for the Secure Real-time Transfer Protocol (SRTP). The default setting is `true` when the basic configuration is made with the Import tool or the web administration portal.
TransportTypeProtocol	Specifies the transport protocol. The default value is TCP. **Note:** If you change the protocol to or from TLS, it can take a few minutes to reestablish the connection with IP Office.

Chapter 22: Voice Extension Adapter configuration

This chapter describes options available in the Configuration module.

The Voice Extension Adapter (VEA) controls the routing and queuing devices in the call center.

Note:

You can assign a CHAP server to a VEA if the host names match.

VEA tab field descriptions

The VEA tab lists all known Voice Extension Adapters (VEA) and host names.

Name	Description
Name	Displays the name of the VEA.
Host name	Displays the name of the VEA in the network.
SessionId	Displays the session ID of the VEA.
Starting time	Specifies the time at which the VEA starts.
Version	Displays the current version of the VEA.

Button	Description
Edit	Opens the selected VEA. You can edit the properties.
Create	Adds a new VEA.
Delete	Deletes the selected VEA.
Refresh	Updates the display. The system updates the start time and version.

Adding Voice Extension Adapters

About this task

You can add Voice Extension Adapters (VEA) to control the routing devices and queuing devices in the IP Office Contact Center system.

Procedure

1. Click **VEA** > **Create**.

   The system displays the VEA - Create dialog box.
2. Enter the required settings.
3. Click **OK**.

   The system displays the configured VEA in the list of VEAs.

VEA Edit tab field descriptions

Table 1: The General tab

Name	Description
Name	Displays the chat server name.
Host name	Specifies the name of the VEA in the network. You can use the IP address. You cannot edit this value.
Session-ID	Specifies the session-ID. You cannot change this setting.
Start time	Specifies the start time. You cannot change this setting.
Version	Specifies the version. You cannot change this setting.

Table 2: The Properties tab

Name	Description
DefaultScript	Specifies the default script. You cannot change this setting.
DisconnectSupervisionTimeout	You cannot change this setting.
MaxCountOfDialingDevices	Displays the percentage of available devices for the dialer that the system uses for outbound jobs. The default value is `30%`.

Table continues…

Name	Description
MaxCountOfWaitQueueDevices	Displays the percentage of available devices that the system uses for the queue devices.
MaxSpeakTime	Specifies the maximum time that a call is kept in the queue. After this time, the queued call is dropped. The default expiry time is 1800 seconds.
MaxTransferTime	Specifies the maximum time an agent can take to transfer a call. You cannot change this setting.
PlayTextSeqRetryCount	You cannot change this setting.
PlayTextSeqRetryTimeout	You cannot change this setting.
TaskserverActionTimeout	You cannot change this setting.
TaskserverRouteResponseTimeout	You cannot change this setting.
UseCarrierBasedRouting	Displays the setting for the UseCarrierBasedRouting parameter. The default setting is `true`. Ensure that UseCarrierBasedRouting is set to `true` so that calls that cannot be routed in the CIE system can be further routed in the intelligent network. If the UseCarrierBasedRouting parameters is set to `false`, the caller hears a dial tone.

Chapter 23: Chat server configuration

This chapter describes options available in the Configuration module.

The IP Office Contact Center chat system uses the Extensible Messaging and Presence Protocol (XMPP). You must configure a chat server and a chat task server.

The Configuration module contains one chat server. If a chat server already exists, then the system disables the **Create** and **Delete** buttons. Only the **Edit** button is enabled. The **Delete** button is enabled if more than one chat server exists.

You cannot enable Chat for agent groups, agents, and topics if there is no chat server available. If you select the **Chat** check box in the **Agent Group - Edit**, **Agent - Edit**, or **Topic - Edit** dialog boxes, the systems displays an error message.

Chat server tab field descriptions

Name	Description
Name	Displays the name of the chat server.
Host name	Displays the name of the chat server in the network.
Port	Displays the port number for the chat server.
Domain	Specifies the domain for the chat server.
Encryption	Specifies the type of encryption. The options are: • **<None>** • **Automatic negotiation**
Task server	Displays the name of the task server. You can hide the **Task server** setting on the Chat tab for topics and agents.

Button	Description
Edit	Opens the selected chat server. You can edit the properties.

Task server edit dialog field descriptions

Name	Description
Name	Displays the name of the chat task server.
Hostname	Specifies the host name of the computer on which the task server runs.
Session-ID	Displays the session ID. You cannot change this setting.
Start time	Displays the start time. You cannot change this setting.
Version	Displays the version of the chat task server. You cannot change this setting.

Chapter 24: Chat script configuration

This chapter describes options available in the Configuration module.

You can use a chat script for a topic and an agent. You can also use a chat script in the Task Flow Editor. The system sends the configured text of a chat script to the chat participants automatically.

Chat script tab field descriptions

Name	Description
Name	The name of the chat script.
Type	The type of the chat script.

Button	Description
Edit	Opens the selected chat script. You can edit the properties.
Create	Creates a new chat script.
	Deletes the selected chat script. When you delete a chat script, the system deletes the configured elements, such as agents and topics. You cannot delete the chat script that the active task flow uses.

Adding chat scripts

Procedure

1. On the Chat server tab, click **Create**.

   The system displays the Chat script – Create dialog box.
2. Enter the required settings.
3. Click **OK**.

   The system displays the configured chat script in the list of chat scripts.

Chat script Create field descriptions

Name	Description
Name	Specifies the name of the chat task server using maximum 29 characters.
Text	Specifies the text in the chat script. **Note:** You must not use the percent symbol (%).
Tag	Displays the configured tags. You can use tags in the text. The system marks a tag with a percent symbol (%).

Chapter 25: System settings configuration

This chapter describes options available in the Configuration module.

Configuring general settings

Procedure

1. On the **System** menu, click **General**.
2. Enter the required settings.
3. Complete the tabs in the dialog box.
4. Click **OK**.

System settings field descriptions

The following table describes the options in the System Settings tab:

Name	Description
System language	Enables you to select a language for the user interface. You can also change the language settings while configuring the general settings for an agent. This field does not affect the language settings for individual users. The language change takes effect the next time that you log in. **Note:** The calendar under **Basic data** > **Period** is not translated unless you set your system locale to match the selected language. On a Windows computer, you can change the locale from the **Format** drop-down menu under **Control panel** > **Region and language**.
System image	Displays an image for IP Office Contact Center. You can select an image from the images stored in the system.
Last/Current agent routing functionality	Specifies the last and current agent routing function. The options are: • **System-wide**: Saves the number of the caller and the connected agent in a topic after a conversation. If the caller calls again in the defined period, the

Table continues…

Name	Description
	system reconnects the call to the same agent even if the topic selected is different. • **Topic-specific**: Connects the caller to the same agent only if the caller selects the same topic.
Use break codes	Specifies whether you must use break codes. If this check box is not selected, the Break Time codes tab does not appear in the Configuration module.
Password lockout functionality	Enables you to set the following lockout options for agents who enter the wrong login credentials: • **Number of login retries**: The number of failed login attempts. • **Lockout from login**: The total time after which agents are locked out. The default value is 60 seconds. **Note:** If any of the above values are set to 0, the password lockout functionality is disabled for all agents in IP Office Contact Center.

Security banner field descriptions

The following table describes the options in the Security Banner tab. This tab allows you to enable a security banner in IP Office Contact Center applications and UIs.

Name	Description
Enable Security Banner	When selected, enables the IP Office Contact Center security banner.
Title	Specifies the title of the security banner.
Description	Enables you to provide a description for your security banner.

Time off overview

You can use the time-off feature for the call distribution during the task flow processing. You can use the time-specific keyword *t.holiday* in a logic for the Task Flow Editor module. The system sets *t.holiday* to 1 if you define a time-off period for the present time. The time-off setting is valid across the IP Office Contact Center system, but a blocked period setting is valid only in the module in which the blocked period is defined.

Time Off tab field descriptions

Name	Description
Beginning	Specifies the date and time at which the time-off period starts. If you set **Repetition** to **Daily** or **Weekly**, you can only set the time at which the time off starts. If you set **Repetition** to **Weekly**, you can select a day on which the time off starts. You can enter the time and the date, or you can select the date from the calender.
End	Specifies the date and time at which the time-off period stops. The **End** time for the time off must be after the **Beginning** time.
Repetition	Specifies the repetition of time-off periods. The options are: • **None**: Break does not repeat. • **Daily**: Break repeats daily at the configured time. For example, break repeats daily during the lunch break from noon to 12:30 p.m. • **Weekly**: Break repeats weekly at the configured day and time. • **Yearly**: Break repeats yearly at the configured date and time. For example, break repeats yearly on a specific national holiday.

Button	Description
Add	Adds a new time-off period with the configured properties.
Edit	Opens the selected time-off period. You can edit the properties.
Delete	Deletes the selected time-off period.

Reporting settings

General tab field descriptions

Name	Description
Reporting method	Displays the reporting method that is set for the IP Office Contact Center system. The options are: • **Interval-related reporting**: Default reporting type. • **Back office reporting**

Table continues…

Name	Description
	For more information about the reporting methods, see *Using Avaya IP Office Contact Center for Windows*.
Calculating period of time	Displays the duration of a reporting interval in minutes. The accumulated reporting data in historical reporting are based on this interval. The system calculates all reporting data at the end of the interval. For example, *totNNew* provides the sum of the number of arrived calls in the specific interval. All counters are stored in the database at the end of the next interval. **Note:** Restarting the IP Office Contact Center server during business time of the contact center causes loss of reporting data from the actual and the previous interval. The default value for the interval is 15 minutes. You can also set this value to 30 minutes or 5 minutes.
Reporting data is available in the following resolution	Displays the resolution of reporting data. The list displays the following information about the reporting data: • **Starting time** • **Calculated time period [min]**
Delete reporting data automatically	Specifies the period after which the system deletes the reporting data. You can set a certain period or days after which the system deletes the reporting data. The system deletes only the statistical data. For the task report data, you must set the period separately. This period must be more than 90 days. If you enter a period less than 90 days, the system displays an error message. The default setting is **Delete reporting data automatically after 365 days**.
Reporting from caller's point of view	Specifies whether the system counts the connections with external destinations as successful.
Reporting	Displays the settings for reporting and real time information. The settings are: • **Time slot for redialing**: Specifies the time slot for redialing. You can set a value between 5 minutes and 12:00 hours. If no agent in the call center attends the first call and the caller calls again within the configured time slot, the system reports the caller as a redialer. • **Time slot for First Call Resolution (FCR)**: Specifies the number of requests that an agent finishes with the first call. If a caller in the time slot does not call again, the system reports the call as finished. For the time slot, you can set a value between one hour and seven days. The default setting is three days. When the IP Office Contact Center starts, the time slot also starts. Previous calls are not considered.

Table continues…

Name	Description
Send automatic reporting as E-Mail to	Specifies the SMTP server and domain to send automatic statistics as an email.

Telephony field descriptions

The Telephony tab displays the reporting settings for the Telephony task type. You can set the reporting settings for topics, agent groups, and agents.

Name	Description
Ring time threshold	Specifies when a call is counted as having exceeded the ring time out. You can enter the time in seconds from 0 to 240 seconds. The ***totNExp1*** variable indicates the total number of calls exceeding the ring time out.
Number of conversations	Specifies the total number of conversations through the ***totNConvWait*** variable. The system displays the following details: • ***TotNConvWait <= N***: The system counts a conversation call if the wait time is less than or equal to the value that you set. • ***TotNConvWait > M***: The system counts a conversation if the wait time is more than the value that you set. The value must be greater than the value for ***TotNConvWait <= N***. • ***TotNConvWait > N <= M***: The system displays the values of both wait times, N and M. You can configure this setting for topics, agents, and agent groups.
Number of unanswered calls	Displays the total number of unanswered calls through the ***totNAbanWait*** variable. The system displays the following details: • ***TotNAbanWait <= N***: The system counts an abandoned call if the wait time is less than or equal to the value that you set. • ***TotNAbanWait > M***: The system counts an abandoned call if the wait time is longer than the set value. The value must be greater than the value that you set for ***TotNAbanWait <= N***. • ***TotNAbanWait > N <= M***: The system displays the values of the third and fourth wait times. You can configure this setting for agent groups and topics.
OD: Number of calls ended by external party	Displays the number of calls ended by the external party. OD is Outbound Dialer. You can set this time in seconds for the counter. The system reports a call, which is started by the dialer, as ended if the duration of the call is less than the time that you set. You can configure this setting for topics and agents.

Email tab field descriptions

Name	Description
Number of emails	Displays the number of processed emails. The ***totNDone*** variable indicates the number of processed emails. The counter counts all emails that an agent processes. The wait time is the configurable time when the *totNDone* counter starts counting. The system displays the following details: • **Wait time <= x**: The counter counts all mails that did not wait longer in the topic mailbox than the time you configured. The minimum value for the first wait time, x, is 0:30 hours. • **Wait time > x h and <= y h**: The counter counts all emails that waited longer than a set time **x** and less than a set time **y** in the mailbox for the topic. You can set the second wait time, y, to maximum 168:00 hours. You can set the reporting settings for topics, agent groups, and agents.

Chat tab field descriptions

Name	Description
Number of chat sessions	Specifies the total number of chat sessions. The *totNConvWait* variable. The system displays the following details: • ***TotNConvWait <= N***: The system counts a chat request if the wait time is less than or equal to the value that you set. • ***TotNConvWait > M***: The system counts a chat session if the wait time is longer than the value that you set. The value must be greater than the value for ***TotNConvWait <= N***. • ***TotNConvWait > N <= M*** : The system displays the values of the first and second wait times. You can configure this setting for topics, agents, agent groups.
Number of unanswered chat requests	Specifies the total number of unanswered chat requests through the ***totNAbanWait*** variable. The system displays the following details: • ***TotNAbanWait <= N***: The system counts an unanswered chat request if the wait time is less than or equal to the value that you set. • ***TotNAbanWait > M***: The system counts an unanswered chat request if the wait time is longer than the value that you set. The value must be greater than the value for ***TotNAbanWait <= N***.

Table continues…

Name	Description
	• ***TotNAbanWait > N <= M***: This value specifies the values of the third and fourth wait times. You can configure this setting for agent groups and topics.

Advanced field descriptions

Name	Description
Run compression	Displays the settings for compressing the reporting data. A database stores the reporting data. You can reduce the storage requirement if you compress the data. However, the resolution of the reporting data reduces when you compress the data. You can select the period after which you want to compress the reporting data. You can also select whether you want to compress the reporting data. The system compresses the data of all task types.
Reporting type	Displays the reporting type. The options are: • **Interval reporting**: Saves conversation times, call times, and other times in the respective intervals. • **Back office reporting**: Stores all counters in the intervals at which the call enters the system. **Note:** If you change the reporting type, you can no longer evaluate old data. You must restart your computer to apply changes.
Compress to smallest interval after x days	Specifies that the system compresses the reporting data after the time that you set. The system calculates the data for the new resolution, and this data match the selected smallest interval.
Compression to one day after y days	Specifies that the system compresses the reporting data after the time that you set. The system calculates the data for the new resolution. The new resolution of the data is one day. The value of **x** must be smaller than the value of **y**.
Smallest interval	Displays the selected interval. The options are: • **30 minutes**

Table continues…

Name	Description
	• **60 minutes** • **120 minutes**
Current resolution	Displays the current resolution.

Deleting reporting data

About this task

If you do not require the reporting data, you can delete this data from the database. Note that if you delete the reporting data till a specific date, the system deletes the entire data till the specified date. You cannot recover the reporting data that you delete.

Before you begin

Get the delete data privilege.

Procedure

1. On the **System** menu, click **Delete Reporting Data**.
2. In the **Delete all statistical data up to** field, click the calendar icon ( ) and select a date.
3. Click **OK**.

   The system displays a confirmation message.
4. Click **Yes**.

   The system permanently deletes the reporting data until the selected date.

Realtime information default values

General tab field descriptions

Name	Description
Calculating time period	Displays the length of a real time information interval in minutes. After an interval, the system resets the value for TSF to 100% and starts a new calculation. The system also evaluates the Dynamic Task Service Factor (DTSF) for the calculated period of time.

Table continues…

Name	Description
	The options are: • **1** • **5** • **15** • **30** • **60**
Information	Displays the time after which the system updates the periodic real time information.
Use abandoned call list at topic	This check box enables you to use the abandoned call list for a topic. In **Keep list entries for**, enter the duration in the hh:mm format.

Telephony tab field descriptions

You can configure the **Wait time thresholds** field for TSF and DTSF for topics and agent groups. You can also set the wait time threshold for the TSF for the teams.

Name	Description
Wait time thresholds	Displays the wait time thresholds for the following: • **TSF** • **DTSF** The **Wait time thresholds** field determines the duration in seconds after which the system counts a call as having waited too long without being opened. If a call waits in the queue for more than the duration that you set, TSF and DTSF reduce.

E-mail tab field descriptions

You can configure the **Wait time thresholds** field for TSF and DTSF for topics and agent groups. You can also set the wait time threshold for the TSF for the teams.

Name	Description
Wait time thresholds	Displays the wait time thresholds for the following: • **TSF** • **DTSF** The **Wait time thresholds** field determines the duration in hours and minutes after which the system counts an email as having waited too long without being opened. If an email waits in the queue for more than the duration that you set, TSF and DTSF reduce.

Chat tab field descriptions

You can configure the **Wait time thresholds** field for TSF and DTSF for topics and agent groups. You can also set the wait time threshold for the TSF for the teams.

Name	Description
Wait time thresholds	Displays the wait time thresholds for the following: • **TSF** • **DTSF** The **Wait time thresholds** field determines the duration in hours and minutes after which the system counts a chat request as having waited too long without being opened. If a chat request waits in the queue for more than the duration that you set, TSF and DTSF reduce.

Variables overview

You can use variables in the Task Flow Editor module and Realtime Information module. Before using variables, you must configure the variables. You can access the variables with the Realtime Information module and change the configured values.

You can define variables for the following objects:

- Agent
- Agent group
- External Destination
- Global
- IVR Script
- PBX
- Topic

Defined Variables field descriptions

Name	Description
Selected	Displays the tags with the name, type, data type, and resolution. You can select a tag for the variable.

Table continues…

Name	Description
Object	Displays the list of objects. You can select an object. If you select **Global**, you can use the variable for all objects.
Tag	Displays the list of configured tags. You can select a tag. You can only use user-defined tags for a variable.
Value	Displays the value of the variable. You can change the value.

Button	Description
Add	Creates a new variable with the selected properties.
Change	Opens the selected variable. You can edit the properties.
Delete	Deletes the selected variable.

Tags settings field descriptions

Name	Description
Name	Displays the name of the tag using maximum 29 alphanumeric characters.
Type	Displays the type of tag. The types are: • User defined: Only you can access the tag. • System-specific tags: The whole system can access the tag as a skill.
Data type	Displays the data type of a tag. You must specify **String**, **Number**, **Time** in GMT, or **Duration** in seconds.
Resolution	Displays the integer type. If you select integer as the data type, you can select one of the following resolutions: • Integer. For example, 42 • Tenth. For example, 46.1 • Hundredth. For example, 46.14
Can be changed by CGI server	Specifies whether the CGI server might change a tag. **Note:** An unauthorized person might be able to change a modifiable tag.
Overwrite-protection	Specifies whether a task tag is overwrite-protected.
Applying Tags into Task resulting from Conference/ Transfer	Specifies whether the system starts a conference or delegates an email when a call is transferred. The options are: • **Ignore**: The system does not apply the tag from a consultation to the resulting task.

Table continues…

Name	Description
	• **Apply, where applicable overwrite**: The system applies the tag and overwrites where applicable. • **Apply only if transferred, where applicable overwrite**: The system applies the tag only if the tag is transferred and overwritten where applicable. • **Only applied if not available in the original task**: The system applies the tag only when the tag is unavailable in the original task which is a call. Whether to apply tags from the initial call (C1) or from the consultation (C2) to the resulting call depends on the tag and the customer. While configuring a tag, you can define how the call is handled. When you transfer a call, the system establishes a new connection (C3) after consultation. But the system does not establish a new connection after conference. The resulting connection is the original call (C1). The system applies the tags from the original connections to the new connections. By default, the system ignores the tags from conferences. You can configure a tag coming from a conference to apply to calls. You can configure a conference tag to always apply to the resulting connection. If the same tag is available in the original connection, the system overwrites the value of the tag and preserves the value of C1. Examples for a tag configuration for transfer or consultation: • **LastTopicName**: `apply, where applicable overwrite`. • **FirstTopicName**: `apply only if not available in the original task`.

Defined Tags field descriptions

You can perform the following functions with the Defined Tags dialog box:

Name	Description
Add	Creates a new tag with the respective properties.
Change	Opens the selected tag. You can edit the properties
Delete	Deletes the selected tag. You cannot delete system-specific tags.

Configuration report overview

You can export the current configuration data to Microsoft Excel sheets. You must install Microsoft Excel 2007 or later on your computer. The system displays all exported configuration data in a tabular format. You can edit, save, and print the configuration data. Depending on the volume of data, the export might take a few minutes.

You can export the following configuration data:

Configuration data	Properties
Topics	• General • Blocked periods for each topic • Announcements for each topic • Skills for each topic
Agent groups	• General • Agents for each AG • Virtual AGs
Agents	• General • Topic Authorization • AG authorization • Agent authorization • Team authorization • Telephone authorization • Telephone group authorization • Campaign authorization • Privileges • Skills for each agent
Profiles	• General • Topic Authorization • AG authorization • Agent authorization • Team authorization • Telephone authorization • Telephone group authorization • Campaign authorization • Privileges
Others	• Team composition • Announcements • Announcement scripts • IVR

Table continues…

Configuration data	Properties
	• IVR scripts • Shift plan • Queue device • Defined tags • Break Time code • Variables • External destinations • Customer recognition • PBXs • Country setting • Task server/CHAP • Work places • System • External display • Wallboards • Job codes • Reporting filters • Telephone • External line • Chat server • Chat scripts

Availability for Tasks field descriptions

The Availability for Tasks tab specifies the tasks that an agent can perform.

Name	Description
Telephony	
Maximum calls per agent?	The maximum number of calls for each agent. You can set the value to 0 or 1.
Can agent receive e-mail while on call?	The options are: • **Yes**: Even if the agent gets a call or holds a conversation, the agent can receive emails.

Table continues…

Name	Description
	• **No**: If the agent gets a call or holds a conversation, the agent does not receive further emails.
Can agent receive chat request while on call?	The options are: • **Yes**: Even if the agent gets a call or holds a conversation, the agent can receive chat requests. • **No**: If the agent gets a call or holds a conversation, the agent does not receive further chat requests.
E-mail	
Maximum e-mails per agent?	The maximum number of emails that an agent gets. You can set a value between 0 and 999.
Can agent receive calls while processing e-mail?	The options are: • **Yes**: Even if an agent is processing an email, the agent can receives calls. • **No**: If an agent is processing an email, the agent does not receive calls.
Can agent receive chat requests while processing e-mail?	The options are: • **Yes**: Even if an agent is processing an email, the agent can receive chat requests. • **No**: If an agent is processing an email, the agent does not receive chat requests.
Alerting E-Mails block Voice calls	Select this check box if you want alerting emails, rather than just opened emails, to block voice calls for an agent. By default, this option is not selected.
Chat	
Maximum chat requests per agent?	The maximum number of chat requests that an agent gets. You can set a value between 0 and 999.
Can agent receive calls while processing chat?	The options are: • **Yes**: Even if an agent is processing a chat request, the agent can receive calls. • **No**: If an agent is processing a chat request, the agent does not receive further calls.
Can agent receive e-mails while processing chat?	The options are: • **Yes**: Even if the agent is processing a chat request, the agent can receive emails. • **No**: If the agent is processing a chat request, the agent does not receive further emails.

Table continues…

Name	Description
Use also for Last Agent, Current Agent and Personal Contact	If you select this check box, the values you configured in this tab are considered for tasks that are: • Routed through an agent group. • Distributed directly to an agent through Last Agent Routing, Current Agent, and Personal Contact. For more information about call flow destinations, see *Administering Avaya IP Office Contact Center Task Flow Editor* . By default, this check box is not selected.

Skill Overview field descriptions

Name	Description
View	Displays the objects configured specifically for each skill. The options are: • **<All>**: Displays all objects. • **Telephony**: Displays the skills and skill levels for the **Telephony** task type. • **Email**: Displays the skills and skill levels for the **Email** task type. • **Chat**: Displays the skills and skill levels for the **Chat** task type.
Agent skills	Displays the skills for the configured agents.
Topic skills	Displays the skills for the configured topics.
Global skill reduction	Specifies the percentage value of the considered skills. You can select any value between 0 and 100. By default, the value is 100, which means there is no skill reduction. Any other value means that all skills are reduced by that percentage.

You must configure the skills in the tag list. For more information about tagging, see “Configuring tags”.

Adding agent skills

About this task

You can configure the knowledge and capabilities of an agent. You can specify the minimum requirement for an agent by configuring the skill level. The skill-level specification is in percentage.

Procedure

1. On the Skill Overview tab, click **Agent skills**.

The system lists the agents and configured skills.

2. Click an entry, and type a value.

   You can enter maximum 100 for a skill level.

   The system displays the entry in red.

3. Click **Apply**.

Agent skill example

Example

Agent	Speaks German	Speaks English	Speaks Spanish
A001	100	80	-
A002	100	-	50
A003	50 (in red)	100	-
A004	50	20	50
A005	20 (in red)	100 (in red)	100 (in red)

The Topic skills

You can enter the knowledge level and the capabilities of a topic in the **Topic skills** field. The system lists the topics and configured skills in a table. You need to enter a skill level for a skill with maximum value 100. The value displays the skill level in percentage. You can specify the minimum requirement of an agent for topics by configuring skill levels. When you edit a field and enter a new value, the system displays the newly entered value in red. When you click the **Apply** button, the system applies the settings and the font changes to black.

Topic skill example

The following table displays a topic skill example.

Example

Agent	Knows product A		Knows product B		A speaks German	
	Call	Email	Call	Email	Call	Email
Topic 001	50	50	-	-	90	80
Topic 002	90	-	80	-	90	80
Topic 003	90	90	50	50	90	80
Topic 004	-	-	50	-	90	80
Topic 005	80 (in red)	-	30 (in red)	-	90	80

Workforce management interface

The reporting data of the IP Office Contact Center system is stored in a complex structure in the internal tables of the PostgreSQL database. The edited data referring to topics can be provided daily through an ODBC interface to provide external modules (INVISION) an easy access to the reporting data.

To use the interface for staff planning, you must:

- Install the XSTAT server and configure this server on the IP Office Contact Center system server.

  The *xstat_srv* process must be running.
- Install a PostgreSQL ODBC driver and configure this database for the external module.

Time settings field descriptions

Name	Description
Start time	Displays the start time of the reporting survey. You must use the hours and minutes (hh:mm) format.
Duration	Displays the duration of the reporting survey. You must use the hours and minutes (hh:mm) format.
Interval	Displays the reporting interval for the reporting survey. You must enter the calculated period of time for the reporting settings or a multiple of this value. You must use the hours and minutes (hh:mm) format.
Start calculation	Specifies the time at which the report calculation starts. You must start the calculation at a low-load time. For example, at night. You must use the hours and minutes (hh:mm) format.
Keep data for	Specifies for how long the system keeps the data in the IP Office Contact Center system database, Xstat table. The system overwrites data after this period.

You can configure the start time, the duration, and the interval for a period. For example, daily.

Counters

A counter displays a list with counters for the staff planning interface. This list displays only counters for topics with the **Telephony** task type.

The available counters are:

- Topic counters
- Agent group counters

- Agent counters

Starting or stopping task reports

Before you begin

Get Start/stop reports (Other tab) privileges.

Procedure

1. On the **System** menu, click **Task Reports**.

   The system displays the Task Reports dialog box.

2. Click a task report, and do one of the following:
   - To start an inactive task report, click **Start**.
   - To stop an active task report, click **Stop**.
3. Click **OK**.

Task Reports field descriptions

Name	Description
Name	Displays the task report name. The default task reports are: • **LevelOne(System)** • **LevelTwoAgent(System)** • **LevelTwoTopic(System)** • **AgentLogging(System)** • **LevelOneCustomerHist(System)**
State	Displays the status of a task report. The options are: • **Active** • **Inactive**

Button	Description
Start	Starts the selected task report.
Stop	Stops the selected task report.

Deleting the task report data automatically

About this task

You can configure a period for automatic deletion of the task report data. You can set this time between 90 and 24855 days. The default hold time is 400 days.

Procedure

1. On the **System** menu, click **Task Reports**.

   The system displays the Task Reports dialog box.
2. Select **Delete reporting data automatically**.
3. In the **After** field, type the number of days.
4. Click **OK**.

   The system saves the changes.
5. To apply the changes, restart the *tr_srv* process.

Shift plan overview

The system uses the shift plan for the following online real time information for the Telephony task type:

- Topic real time information: Number of conversations in each shift.
- Topic real time information: Total number of all calls transferred to external destinations in each shift.
- Agent real time information: Number of agent conversations in each shift.

Note:

The system resets the online real time information to zero at the start of each new shift.

You can include any number of shifts in the shift plan. You can set the same shift for all weekdays, or you can set the respective shifts for each weekday. If you want to configure shifts for each weekday, you must not set the **All days identical** option. You can add shifts, delete specific shifts, or delete all shifts. You can only set the start time of a shift. At each start time, the system resets the respective real time information.

Chapter 26: Service settings configuration

This chapter describes options available in the Configuration module.

If you have the appropriate privileges, you can edit service settings.

Reporting filters

You can use the reporting filters to configure the reporting data that the IP Office Contact Center system must evaluate. For example, you can exclude data from being evaluated for labor legislation reasons. Each task type has a counter, and the tabs display the counters for the different task types. You must get appropriate user rights for setting reporting filters. For each reporting type filter, the system displays the corresponding counters. You can set the reporting filters for the following:

- Agent groups
- Agents
- Dialer
- Skill combinations
- System
- Teams
- Telephones
- Topics
- IVR

List of counters

A list displays the counters for the respective type. The counters for a type are subdivided into topics. A plus sign (+) indicates that a topic has further counters. You can click the plus sign to view the counters of a topic. You can also click a topic to change the structure.

The view

You can specify whether the system displays the abbreviations or names of counters for the type of reporting filter. For a name:

- An asterisk (*) indicates that the system divides the counter in-to agent groups during the evaluation.
- A hash (#) indicates that the system divides the counter in-to topics during the evaluation.

Modifying reporting counter names

About this task

While configuring the service settings, you can modify the name of a reporting counter. The system adds the system name of the reporting counter in brackets with the new name. The system uses the modified name in all reports and evaluations.

Note:

In headers, the line breaks after 40 characters. If the counter name is more than 40 characters, the system displays the headers of reporting evaluations in multiple lines.

Procedure

1. On the **Service** menu, click **Reporting Filters**.

   The system displays the Reporting Filters dialog box.
2. Double-click a reporting counter.
3. To change the name of the reporting counter, do the following:
   a. In the **New counter name** field, type a name.

      Note:

      You can use maximum 255 characters.

   b. Click **OK**.
4. **(Optional)** To reset the name to the system name, click **Delete**.

   The system assigns the system name to the reporting counter.

Special settings field descriptions

You must get the appropriate user permissions to configure special settings.

Name	Description
Allow changing topic names	Specifies whether a user can change the names of topics. Only an administrator can change the name of topics.
Allow changing agent group names	Specifies whether a user can change the names of agent groups. Only an administrator can change the name of agent groups.
Minimum team size	Specifies the minimum number of agents that you can add in a team. The team size can range from 0 to 1000 members.

Telephone settings field descriptions

You must get the appropriate user permissions to change the default telephone settings.

Name	Description
Automatic answer	Specifies whether the system answers the calls automatically. The options are: • **For incoming ACD calls**: The system answers the incoming ACD calls automatically. • **For outgoing ACD calls (Dialer)**: The system enables the automatic calling feature for the outgoing ACD calls. • **after x s**: The system answers a call automatically after the specified time. The agent need not click **Answer**. You can set a time between `0` and `255` seconds.

Access code for agents and topics

You can configure the external line code, extension length, and PBX for the access codes. You must sign on with appropriate permissions to configure the settings for access codes for agents and topics.

Access code settings field descriptions

Name	Description
Number	The access code for an agent or topic.
Length	The length of the post dial number.
PBX	The PBX server name.

Button	Description
Change	Displays the properties of the selected access code. You can edit the properties.
Add	Adds a new access code.
Delete	Deletes the selected external line code.

Email settings field descriptions

You need the necessary permissions to define email settings.

You must configure the following settings in the System Settings tab if you use email routing in the IP Office Contact Center system:

Name	Description
E-Mail domain	Displays the agent and the topic domain. You can add the agent and the topic domain. **Note:** In the Email Configuration module, you must also configure the email domain. For example, `company.com`.
Prefix for Ticket ID	Displays the prefix for a ticket ID. If you set a prefix, the system displays the prefix with the ticket ID in the subject line of email replies or forwards.
Suffix for Ticket ID	Displays the suffix to be added after a ticket ID. If you set a suffix, the system displays the suffix after the ticket ID in the subject line of email replies or forwards.

Export archived emails field descriptions

Use the Export archive emails tab to configure the exporting of archived emails.

Name	Description
Enable check box	When selected, this check box indicates that the Email Exporter component is enabled. The Email Exporter is enabled by default. When it is enabled, you can configure the other settings in this tab.
Start export	Enter how long after midnight you want the export to start. By default, the export starts 5 minutes after midnight.
E-Mail age	The email age in days. Emails that are older than the value you enter get exported. They are moved from the database to a zip file. You can access completed zip files from the web administration portal. By default, this value is set to 100 days. The minimum value is 1 day, and the maximum value is 730 days.
Max. zip-File age	The maximum age of the zip file. Zip files that are older than the value you enter are deleted from the disk. This amount is in addition to the email age you configured. By default, this value is set to 100 days. The minimum value is 1 day, and the maximum value is 730 days.
Max. zip-File size	The maximum size in MB of a zip file. When a zip file reaches this size, it is completed and no more emails can be added to the zip file.

Table continues…

Name	Description
	The default size is 250 MB. The minimum size is 10 MB, and the maximum size is 3000 MB.
Zip-File folder	The path to the folder where completed zip files are stored. The default path is `C:\ProgramData\AVAYA\IPOCC\MailExport`.
Working folder	The path to the working directory folder where archived emails and incomplete zip files that are still being created are stored. The default path is `C:\ProgramData\AVAYA\IPOCC\MailExport\work`.

Chat system settings and archive settings field descriptions

The System settings and Archive tabs, which are described in the following tables, are available in **Chat settings**. You can edit your chat server settings by clicking **Chat server**, which is also available from the **Service settings** menu.

System settings

This following table describes the options available for chat on the System settings tab:

Name	Description
Display emoticons	Select this check box if you want emoticons to be displayed within a chat session.
Drop inactive conversation after	Use the drop-down menu to set a time after which an inactive chat conversation ends. You can select 5, 10, 15, 30, or 60 minutes.

The following table describes the options available for chat on the Archive tab. Use this tab if you have a chat archive database.

Name	Description
Activate archive	Select this option to enable chat archiving. The other fields in this tab only apply if archiving is enabled.
Start time for deletion	The time when the system starts deleting chats. Set the time in hours and minutes. You can set this time after midnight, so that the deletion starts after midnight. The default setting is every day at 2:30 a.m.
Delete archive data automatically	Select this check box if you want archived data to be deleted automatically. You must also specify the time after which the data will be deleted. Task Reports must be configured to delete archived data.

Chapter 27: Resources

Documentation

The following IP Office Contact Center documents are available on the Avaya Support website at http://support.avaya.com.

IP Office Contact Center User Interface for Windows documents

Document title	Use this document for	Audience
Administering Avaya IP Office Contact Center Address Books	Administer address books in the IP Office Contact Center interface. The address book feature simplifies agent tasks such as making calls and sending emails.	Administrators
Using the Avaya IP Office Contact Center Configuration and User Interface Configuration Modules	Perform administration tasks with the Configuration and UI Configuration modules. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Dialer	Work with the Dialer module in the IP Office Contact Center interface. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center IVR Editor	Create and edit IVR editor scripts. **Note:** This document is also available as a help system	Administrators

Table continues…

Document title	Use this document for	Audience
	through the product interface.	
Administering Avaya IP Office Contact Center Task Flow Editor	Create and edit task flow editor scripts. As of Release 10.0, this document also contains the task tag information that was previously in a separate *IP Office Contact Center Task Tags Reference* document. The separate document has been discontinued. **Note:** This document is also available as a help system through the product interface.	Administrators
Administering Avaya IP Office Contact Center Text Blocks	Create, edit, and administer text blocks for the IP Office Contact Center email feature.	Administrators
Using Avaya IP Office Contact Center for Windows	Use the IP Office Contact Center User Interface for Windows. **Note:** This document is also available as a help system through the product interface.	All interface users, including agents, supervisors, and administrators.

Other related IP Office Contact Center documents

Document title	Use this document for	Audience
Avaya IP Office Contact Center Feature Description	Understand IP Office Contact Center features and capabilities.	All users
Avaya IP Office Contact Center Reference Configuration	Understand IP Office Contact Center deployment topologies, network architecture, system capacities, product interoperability, and functional limitations of specific configurations.	• Sales and support personnel • Architects • Implementation engineers
Addendum to Avaya IP Office Contact Center Task Based Guides	The Task Based Guides (TBGs) are not being updated in this release. This addendum is an add-on to the existing TBGs. The	• Support personnel • Implementation engineers • Administrators

Table continues…

Document title	Use this document for	Audience
	addendum only includes new Release 10.1.2 content. It does not replace the existing TBGs. Use the addendum in combination with the following existing Release 10.1 and Release 10.1.1 TBGs: • *Avaya IP Office Contact Center Core Installation Task Based Guide* • *Avaya IP Office Contact Center Advanced Installation Task Based Guide* • *Avaya IP Office Contact Center Maintenance Task Based Guide* • *Avaya IP Office Contact Center Telephony User Interface Configuration Task Based Guide* • *Avaya IP Office Contact Center Dialer Task Based Guide* • *Avaya IP Office Contact Center Task Flow Editor Telephony Task Based Guide* • *Avaya IP Office Contact Center IVR Editor Scenarios Task Based Guide* • *Avaya IP Office Contact Center Email and Chat Services Task Based Guide* • *Avaya IP Office Contact Center Reporting Task Based Guide* • *Configuring Call Recording for Avaya IP Office Contact Center* **Note:** The Release 10.1.1 TBGs are in English only.	

Finding documents on the Avaya Support website

Procedure

1. Navigate to http://support.avaya.com/.
2. At the top of the screen, type your username and password and click **Login**.
3. Click **Support by Product** > **Documents**.
4. In **Enter your Product Here**, type the product name and then select the product from the list.
5. In **Choose Release**, select an appropriate release number.
6. In the **Content Type** filter, click a document type, or click **Select All** to see a list of all available documents.

   For example, for user guides, click **User Guides** in the **Content Type** filter. The list displays the documents only from the selected category.
7. Click **Enter**.

Training

You can access training courses and credentials at http://www.avaya-learning.com. To search for a course, after logging in to the website, enter the course code or the course title in the **Search** field and press **Enter** or click **>**.

Table 3: IP Office Contact Center courses and certification credentials

Course code	Course title
ACDS-3782	Design — Avaya IP Office Contact Center
ACIS-7750	Implementation — Avaya IP Office Contact Center
ACSS-7894	Support — Avaya IP Office Contact Center

Viewing Avaya Mentor videos

Avaya Mentor videos provide technical content on how to install, configure, and troubleshoot Avaya products.

About this task

Videos are available on the Avaya Support website, listed under the video document type, and on the Avaya-run channel on YouTube.

Procedure

- To find videos on the Avaya Support website, go to http://support.avaya.com and perform one of the following actions:
  - In **Search**, type `Avaya Mentor Videos` to see a list of the available videos.
  - In **Search**, type the product name. On the Search Results page, select **Video** in the **Content Type** column on the left.
- To find the Avaya Mentor videos on YouTube, go to www.youtube.com/AvayaMentor and perform one of the following actions:
  - Enter a key word or key words in the **Search Channel** to search for a specific product or topic.
  - Scroll down Playlists, and click the name of a topic to see the available list of videos posted on the website.

  Note:

  Videos are not available for all products.

Support

Go to the Avaya Support website at http://support.avaya.com for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Using the Avaya InSite Knowledge Base

The Avaya InSite Knowledge Base is a web-based search engine that provides:

- Up-to-date troubleshooting procedures and technical tips
- Information about service packs
- Access to customer and technical documentation
- Information about training and certification programs
- Links to other pertinent information

If you are an authorized Avaya Partner or a current Avaya customer with a support contract, you can access the Knowledge Base without extra cost. You must have a login account and a valid Sold-To number.

Use the Avaya InSite Knowledge Base for any potential solutions to problems.

1. Go to http://www.avaya.com/support.
2. Log on to the Avaya website with a valid Avaya user ID and password.

   The system displays the Avaya Support page.
3. Click **Support by Product** > **Product Specific Support**.
4. In **Enter Product Name**, enter the product, and press `Enter`.
5. Select the product from the list, and select a release.
6. Click the **Technical Solutions** tab to see articles.
7. Select relevant articles.

Glossary

ACW ACW stands for After Call Work.

AES The AES server is a media server. This media server establishes the TSAPI connection between the CIE system and PBX.

CSV A Comma separated values (CSV) file is a text file for saving or exchanging data with a simple structure.

Fax Fax is short for facsimile or telefacsimile.

NC NC stands for network computer. Network computers are terminals adapted to the Internet. Since NCs have their own local CPU power, they are referred to as network computers instead of network terminals. NCs are computers that do not have a hard disk and download their software from the network.

RPC RPC stands for Remote Procedure Call. An RPC is the call of a procedure in a module or task that might be located on a remote PC. In other words, in remote procedure call, a procedure is called on the local host and run on the remote host. Possible results and the end of the procedure are returned to the first PC, that is local host.

SMS SMS stands for Short Message Service. SMS is a telecommunications service for transferring text messages.

TSF TSF stands for Task Service Factor.

UNC UNC stands for Uniform Naming Convention. UNC is a widely accepted standard for addressing shared resources, such as folders, drives, on a PC network. UNC eliminates the need to assign a drive letter to connect. For example: `\\servername\sharename\path` (Windows).

VEA VEA stands for Voice Extension Adapter.

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