



Alcatel-Lucent OmniPCX Office Communication Server

User Manual

Call Center - Agent Assistant Application

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- 2004/108/EC (concerning electro-magnetic compatibility)
- 2006/95/EC (concerning electrical safety)
- 1999/5/EC (R&TTE)



Call Center - Agent Assistant Application

Chapter 1 Agent Assistant

1.1	Introduction to the Agent Assistant	1.1
1.2	Connecting to the Agent Assistant	1.1
1.2.1	Connecting as an Agent	1.1
1.2.2	Connection Errors	1.2
1.2.3	Closing the Agent Assistant	1.3
1.3	ACD Agent Mode	1.3
1.3.1	Agent Assistant Interface	1.3
1.3.2	Toolbar	1.3
1.3.3	Agent Information	1.4
1.3.4	Agent Status	1.4
1.3.5	Call Information	1.5
1.3.6	Call Log	1.5
1.3.7	Customer Database	1.7
1.3.8	Agent Parameters	1.9
1.3.9	Traffic Visualization	1.10
1.4	Agent Administration Mode	1.12
1.4.1	Connecting as an Agent Administrator	1.12
1.4.2	Agent Assistant Administration	1.13

1.1 Introduction to the Agent Assistant

The Agent Assistant is a software to be installed on the agent's IT workstation. It provides continuous communication with the call center integrated with the communications server.

In receive mode, the Agent Assistant receives information on the ACD (ACD) load in real time and the agent can consult traffic statistics. As the system receives an incoming call to the agent's station, the Agent Assistant simultaneously receives all the information about the call: the caller's waiting time, caller number, etc. In this way the Agent Assistant can interact with external information systems to display the customer record.

In outgoing call mode, the Agent Assistant offers the agent a user-friendly addition to his telephone set. In practice, agents can not only declare their status more easily (on duty, off duty, etc.), but also indicate their skills (ACD group), declare themselves on any position (free-seating) and describe the calls.

1.2 Connecting to the Agent Assistant

There are two ways connect to the agent assistant:

- As an ACD agent to process customer calls (see: [Connecting as an Agent](#))
- As the agent administrator to manage agent rights (see: [Connecting as an Agent Administrator](#))

1.2.1 Connecting as an Agent

To connect to the Agent Assistant:

1. Start the Agent Assistant.
The connection window is displayed:



Figure 1.1: ACD Agent Connection Window

2. Select your identifier from the list of declared agents
3. **Extension**: enter the extension number associated with the agent PC
4. **Server name**: enter the name or the IP address of the communication server
5. **Language**: select the agent language
6. **Password**: enter your password (optional)
This field is displayed only when a password is configured.
7. Click **Connection**
You are connected as an ACD agent and the main window is displayed (see [Agent Assistant Interface](#)).

Automatically connect: validate this check box to connect automatically to the same server when the Agent Assistant starts.

1.2.2 Connection Errors

Connection fails when:

- The number of connected agents exceeds the license number:
 - For the Alcatel-Lucent Welcome Office package, 10 agents are allowed
 - For the Alcatel-Lucent Welcome Office Pro package, 20 agents are allowed
- The selected agent is already connected on another workstation
- The workstation is already used by another agent

1.2.3 Closing the Agent Assistant

When the agent closes the application, a confirmation window is displayed.

When the Agent Assistant is closed, the agent status is set according to the agent parameters: **Unlog extension (free seating mode)** and **Retain agent state when logging off**

When:

- Neither of the boxes is checked, the agent status remains unchanged
- The **Unlog extension (free seating mode)** is checked, the agent is placed off-duty automatically. However, the agent can use his phone to put himself on duty and become active
- The **Retain agent state when logging off** and **Unlog extension (free seating mode)** check boxes are validated, the agent is put off-duty automatically and the associated workstation is no longer handled by the call center. When the agent wants to use the terminal again (as a workstation handled by the call center), he must restart the Agent Assistant

1.3 ACD Agent Mode

1.3.1 Agent Assistant Interface

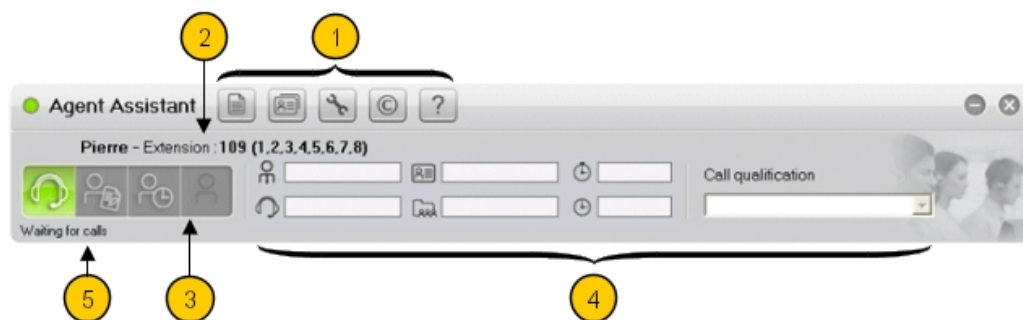


Figure 1.2: Agent Main Window

The agent interface includes several areas:

1. Toolbar
2. Agent information
3. Agent status
4. Call information
5. Agent activity: this area is presented in the supervisor manual

1.3.2 Toolbar



Figure 1.3: Agent Toolbar

The tool bar allows access to:

1. Call Log (see [Call Log](#))
2. Customer information (see [Customer Database](#))
3. Agent parameters (see [Agent Parameters](#))
4. Agent Assistant information window (this displays the application release)
5. On line help

1.3.3 Agent Information

Pierre - Extension : 109 (1,2,3,4,5,6,7,8)

Figure 1.4: Agent Information Area

This field contains:

- The agent identifier
- The agent extension number
- Group number(s) to which the agent is assigned

1.3.4 Agent Status

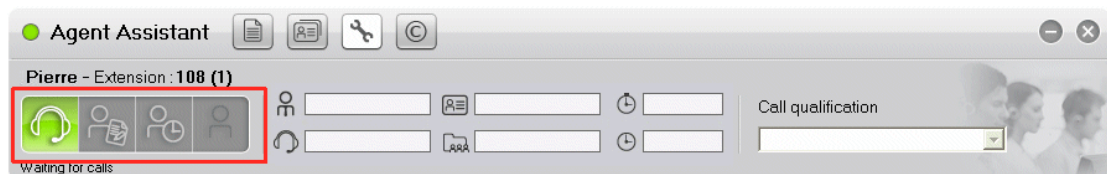






Figure 1.5: Agent Status Area

These icons display agent status. To modify the status click the associated icon:

Icon	Status	Meaning
	On duty	the agent is ready to answer calls

	On clerical work	the agent is not ready to answer calls. The agent is completing administration work due to a previous call.
	Temporary absence	the agent is not available to answer calls
	Off duty	the agent is not available

1.3.5 Call Information

The call information area gives information about the current call.

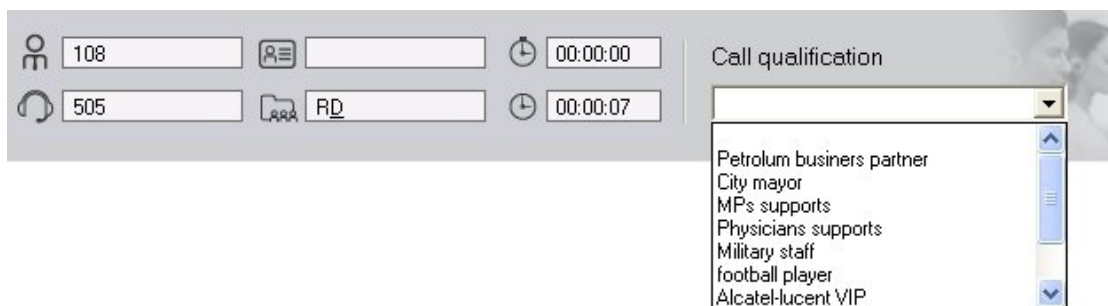








Figure 1.6: Call Information Area

Icon	Meaning
	This field displays the calling number
	This field displays the dialed number
	This field displays DTMF numbers dialed by the caller. For example: account number Record number etc...
	This field displays the called group. An agent can belong to several groups
	This field displays the waiting time of the call
	This field displays the time spent in communication, clerical work, temporary absent

Call qualification: the agent uses this drop-down list to qualify a call.

This qualification is used for agent/group of agents calls & duration statistics (the means & the total). Items in the call qualification list are defined by the administrator of each group.

1.3.6 Call Log

The **Call Log** window displays the history of calls which had occurred on the local machine.

To access the **Call Log** window click the  button.

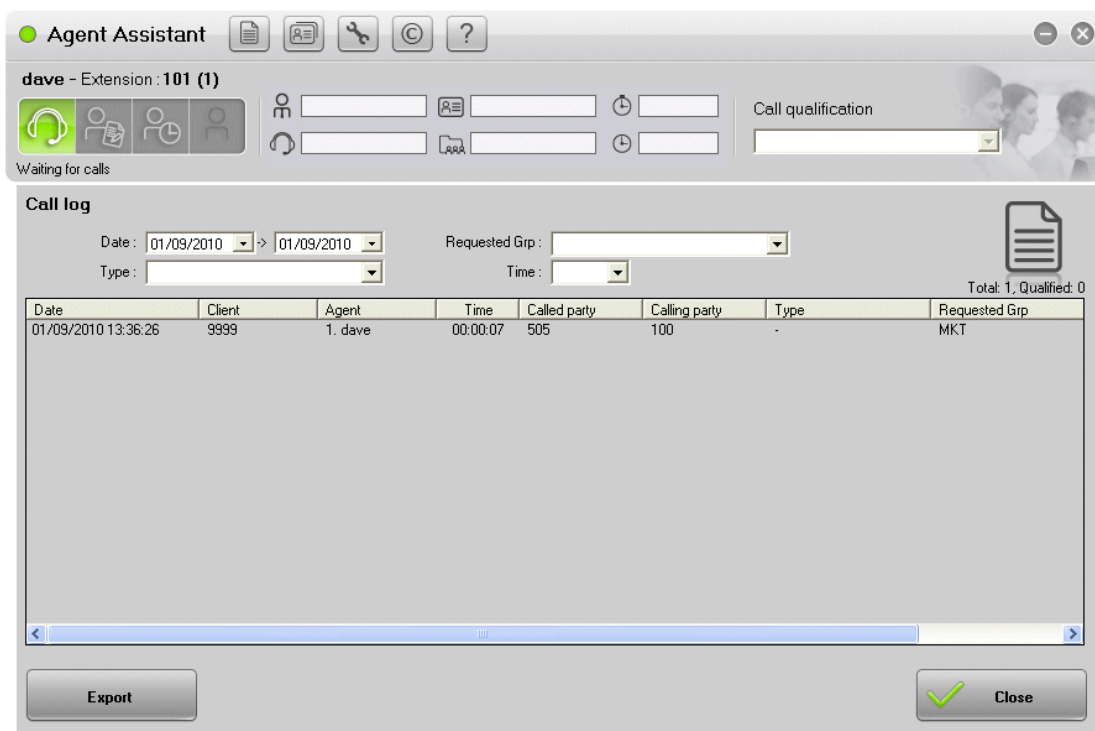


Figure 1.7: Call Log Window

The top part of the window is used to set filters. These filters limit the number of displayed items.

Filters can be set for:

- **Date:** only calls received between the two specified dates are displayed
- **Type:** only calls with the specified qualification are displayed
- **Requested Grp:** only calls for the specified group are displayed.

If a call is displayed with a different **Group** (defined by the filter), it means that at the time of the call, the requested group was closed or saturated and the call was treated by a different group.

- **Time:** only calls with a duration superior to the time selected from the drop-down menu are displayed

The information for each call is displayed and includes:

- **Time:** the date and time of the call
- **Client:** the client name

- **Agent:** the name of the agent who dealt with the call
- **Time:** the duration of the conversation with the agent
- **Called Party:** the called number
- **Calling Party:** the calling number
- **Type:** the call qualification
- **Requested Grp:** the requested group

Export

Click **Export** to create a text file containing the information of the call log window. In this text file, fields are separated by a ";" character.


The default name: `journal.txt` can be modified and the directory where to save the file can be changed.

1.3.7 Customer Database

The customer database stores information on customers.

There is one customer form per customer.

To display the customer form:

- **Manual display:** click the  button to display the list of customers and select your customer (see: [List of Customer](#)).
- **Automatic display:** when you are connected to a customer call, the corresponding customer form is displayed automatically (see: [figure: Client Information Form](#)).
The system retrieves customer information according to:
 - The customer code, transmitted via DTMF
 - The calling numberTo select the used information, see the Expert documentation.
When the customer code and the calling number are unknown in the database, the system operates as if it was a new customer calling. An empty customer form is displayed.
Automatic display requires that your **Automatic screen pop up** parameter is validated (see: [Agent Parameters](#)).

1.3.7.1 List of Customer

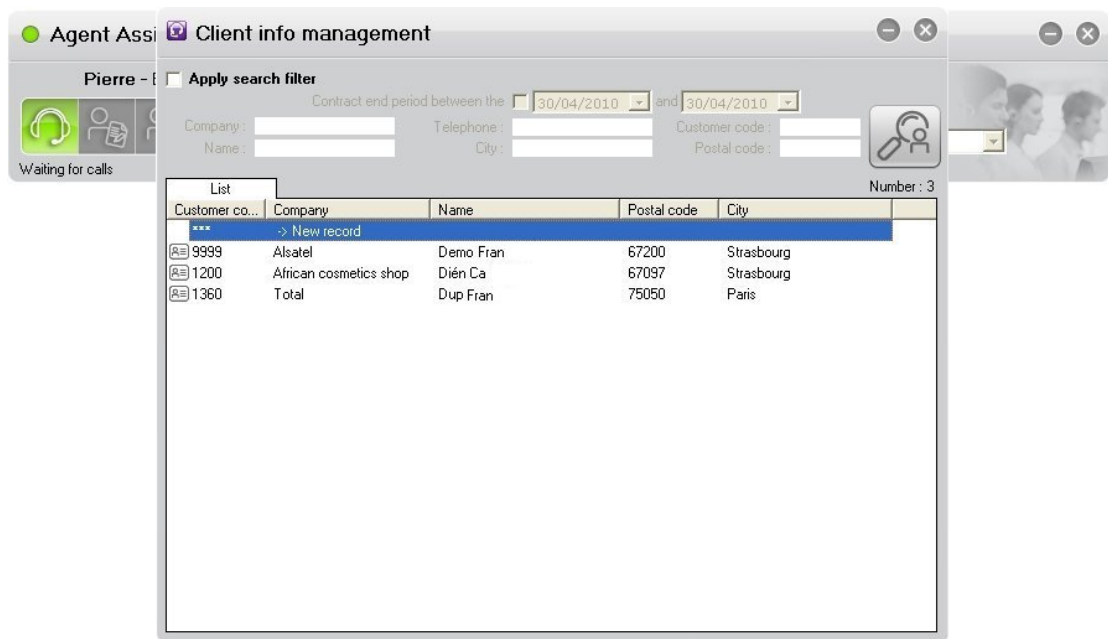


Figure 1.8: Customer List Tab

The **List** tab displays the customer list.

You can:

- Display (or modify) customer details: double click on a customer, the customer information form is displayed (see [figure: Client Information Form](#))
- Create a new customer: double click on **New record**, the customer information form is displayed (see [figure: Client Information Form](#))
- Filter the customer list: validate the **Apply search filter** check box and fill one or several fields
- Suppress a customer:
 1. Select a record
 2. Right click
 3. Select: **Suppress the record**
 4. Confirm the suppression

1.3.7.2 Customer Form

Agent Assistant [Icons: Document, Phone, Key, Copyright, Help]

dave - Extension : 101 (1)

Waiting for calls

Client info management

☐ Apply search filter

Contract end period between the and

Company: Telephone: Customer code:

Name: City: Postal code:

Client information (Number: 5)

Customer code: **9999** Creation date: **30/08/2010**

Company: **tartempion** Telephone: **103**

Name : marc Home: **0390677700**

Firstname: GSM:

Address: Fax:

Postal code: **67200** Email: **marc.duvernay@hotmail.com**

City: **strasbg** Contract end date: Call log: [\[Call log\]](#)

Comments:

Figure 1.9: Client Information Form

The **Client information** tab provides access to the customer details.

You can:

- Modify the fields in the **Customer information** pages directly, Click **Change** to confirm the modifications.
- Consult the customer information, click **Cancel** to close the **Customer information** page after consultation

Note:

The **Contract end date** field is for information only. It is not associated with any functionality and could be used, for example, to indicate the final date of the customer's contract.

1.3.8 Agent Parameters

These parameters define the working environment for the agent.

To Modify agent parameters:

1. Click the  button

The **Agent parameters** window is displayed:

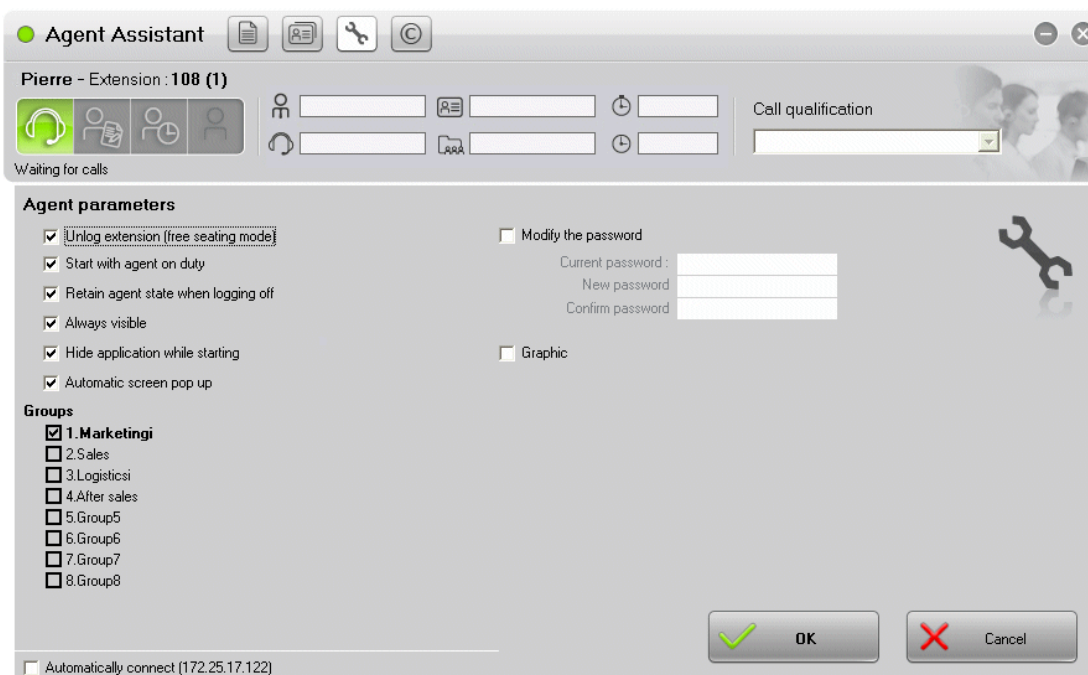


Figure 1.10: Agent Parameters Window

2. Validate one or more of the check boxes:

- **Unlog extension (free seating mode):** validate the check box to change the agent state to **Off duty** on closing the application. See [Closing the Agent Assistant](#)
- **Start with agent on duty:** validate the check box to change the agent state to **On duty** on starting the application
- **Retain agent state when logging off:** validate the check box to remain the same agent state on closing the application. See [Closing the Agent Assistant](#)
- **Always visible:** validate the check box to always display the Agent Assistant window in the foreground
- **Hide application while starting:** validate the check box to hide the main application window when starting. Click the icon on the task bar to display the application window
- **Automatic screen pop up:** validate the check box to display customer information when receiving an incoming call
- **Groups:** this field display the list of available groups. Validate the associated check box to assign the group to the agent. An agent is assigned to a group by the supervisor or can be assigned by the agent (depending on specific agent access rights).
- **Modify the password:** validate this check box and fill the associated fields to modify agent password. Specific rights are required.
- **Graphic:** validate this check box to display the group traffic (see: [Traffic Visualization](#))
- **Automatically connect:** validate this check box to automatically connect to the same server when the Agent Assistant starts

3. Click **OK** to validate

1.3.9 Traffic Visualization

The traffic visualization window displays in real time the waiting queue for each group. The traffic visualization is displayed when the **Graphic** check box of the **Agent parameters** window ([Agent Parameters](#)) is validated.

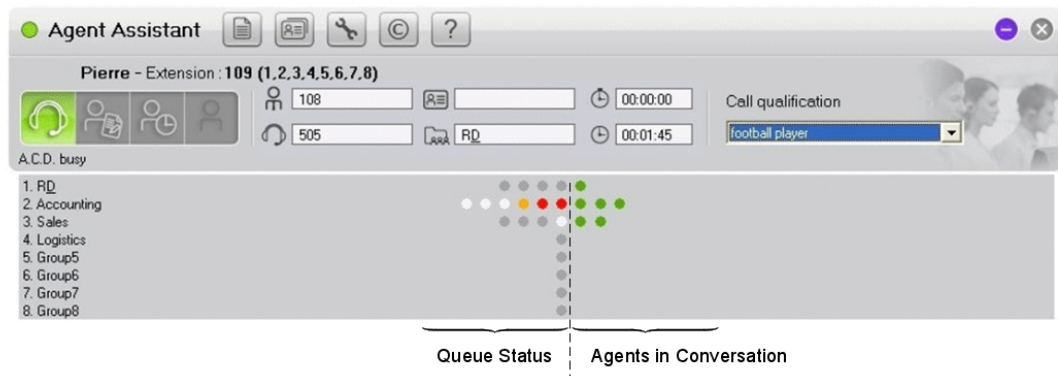


Figure 1.11: Traffic Display

For each group, the following information is displayed:

- Agents in conversation (on the right of the window)
Each green circle corresponds to an agent in conversation with a customer
- Status of each call in the queue (on the left of the window)
Each circle corresponds to one position in the queue. The color of the each circle indicates the status of the position:
 - Grey: this position is empty
 - White: a call is waiting in this position
 - Orange: a call is waiting for a time exceeding the S1 threshold (defined in system parameters)
 - Red: a call is waiting for a time exceeding the S2 threshold (defined in system parameters)

Note 1:

*The number of circles is defined by the **Queue Length**. The queue length is defined by the number of agents assigned to the queue multiplied by the number of calls per agent. The **Queue Length** parameter is configured by the system administrator.*

Examples:

In [figure: Traffic Display](#) :

- *In the **RD** queue, there are four empty positions (four grey circles) and one agent is in conversation (1 green circle)*
- *In the **Accounting** queue:*
 - *There are six waiting positions*
 - *Two calls are waiting for a time exceeding the S2 threshold (two red circles)*
 - *One call is waiting for a time exceeding the S1 threshold (one orange circle)*
 - *This queue is full (no grey circle)*
 - *Three agents are in conversation (threes green circles)*

Note 2:

When a queue is full, new calls are dissuaded.

- In the **Sales** queue, only one call is waiting. and two agents are in conversation (two green circles)
- The other queues are closed

1.4 Agent Administration Mode

1.4.1 Connecting as an Agent Administrator

To connect to the Agent Assistant:

1. Start the Agent Assistant.
The connection window is displayed:

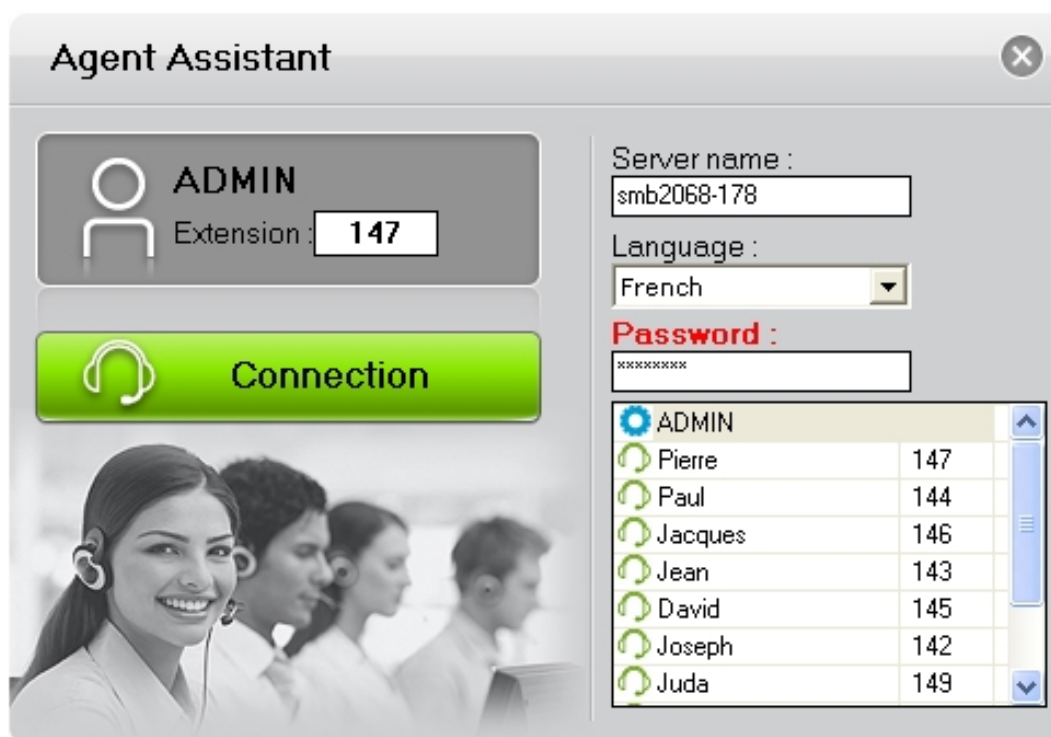


Figure 1.12: Agent Administration Connection Window

2. Select **ADMIN** from the list of declared agents
3. **Extension**: this field is not used, leave this field empty or keep the default value.
The agent administrator has no extension.
4. **Server name**: enter the name or the IP address of the communication server
5. **Language**: select the agent language
6. **Password**: enter the **ADMIN** password.
When the password is correct, the **Connection** button color changes to green to indicate that it is active.

7. Click **Connection**

You are connected as an agent administrator and the agent configuration window is displayed (see [Agent Assistant Administration](#)).

1.4.2 Agent Assistant Administration

The agent assistant administration window is used to carry out some administration operations and to modify agents rights. Only the agent administrator can access this window.

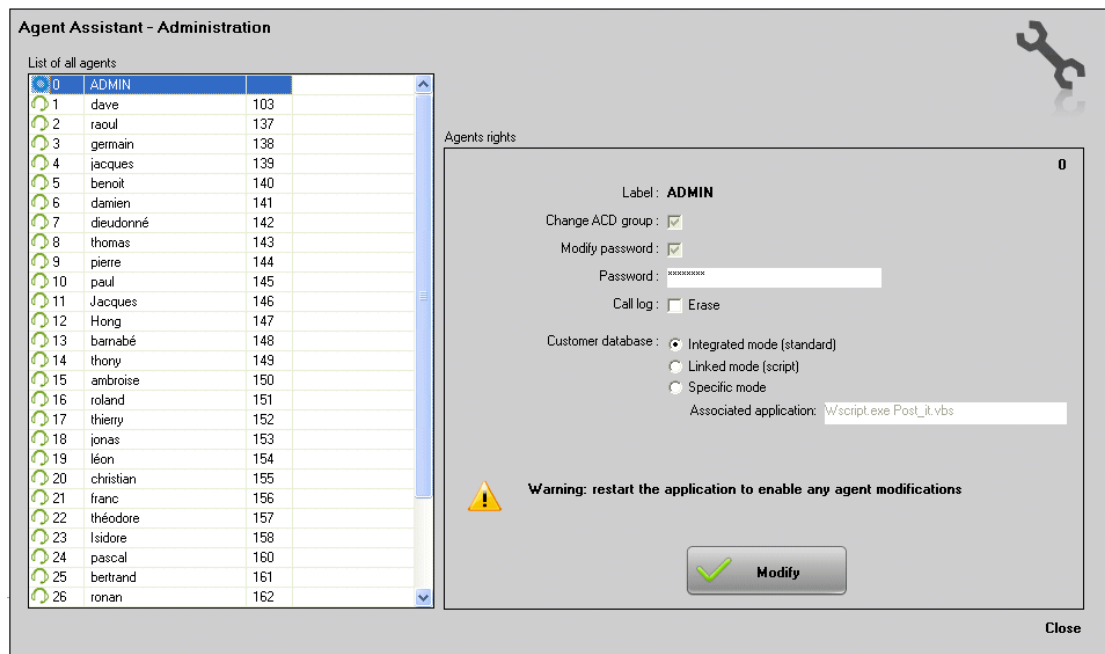


Figure 1.13: Administrator Right Configuration Window

To modify agent rights:

1. Select an agent from the **List of all agents**
The current agent rights are displayed.
2. Modify rights:
 - When selecting item number 0: **ADMIN**, the rights of administrator are displayed in the right part of the window (see: [figure: Administrator Right Configuration Window](#))
You can modify the following information:
 - **Password**: enter a new password
 - **Call Log**: validate this check box to delete all call log information on the local machine.
 - **Customer database**:
The call center manager indicates the mode of connection to the Customer Database.
The following choices are available:

- **Integrated mode (standard)** is the default mode: the Agent application is provided with a Manage Customer Records program (GestFiche.exe) to store key customer information and to ensure the customer record pops up on the screen (Screen pop-up) when a call is received.
- **Linked mode (script):** this mode causes a script (Windows Scripting Host) to be executed during an incoming call and when the agent clicks the **Manage Records** button in the agent application.
The Agent application comes with a default script file. The language used is VBScript. However, the call center manager can modify the script file as he sees fit to ensure it works with his applications. This operating mode is generally used to access a customer database in MS Outlook. It offers a great flexibility since all modifications can be made to the script without having to modify the Agent application. Please contact Alcatel-Lucent Enterprise Customer Service for any additional information you may need on using customized scripts.
- **Specific mode:** This final mode works by connecting the Agent application to a third-party application. Several companies use their own "Customer Relations Management" software. The call center manager can specify an application to be called up by the Agent application when receiving an ACD call. When a call is assigned to an agent, the associated agent application runs the command line entered in this section, followed by the three parameters for the call: the caller's number, the number called and the user code.
The syntax is as follows:

```
program [option] /1:number_caller /2:number_called /3:user_code
```

 By default, for example, program [option] is the same as Wscript.exe post_it.vbs.
- When selecting any other item, the rights of the selected agent are displayed in the right part of the window:

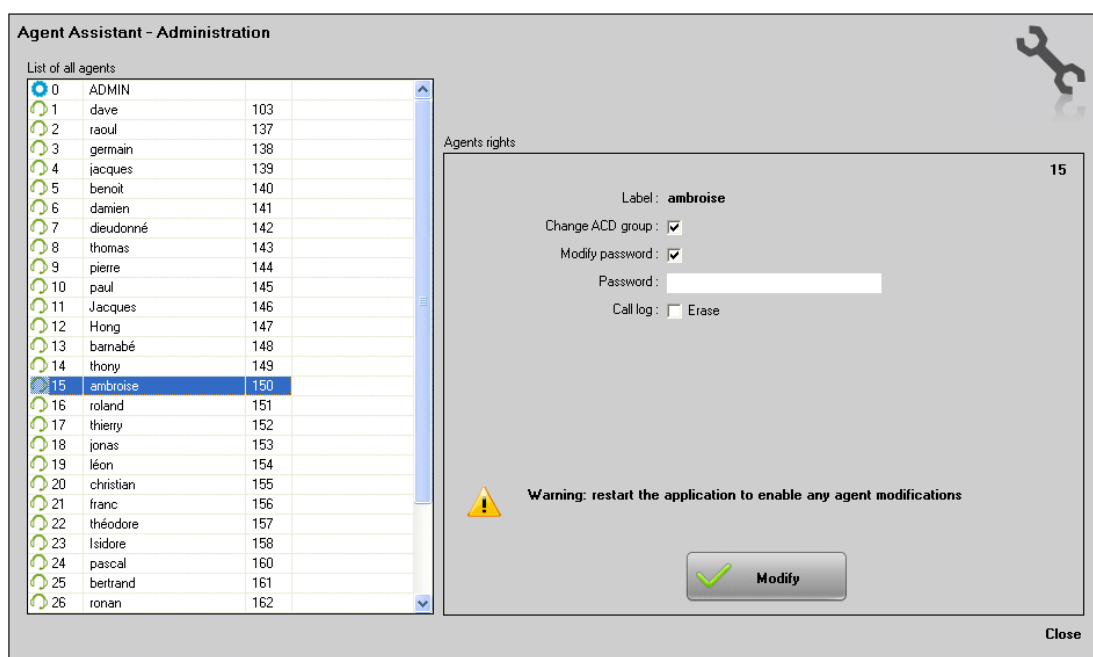


Figure 1.14: Agent Right Configuration Window

You can modify the following information:

- **Change ACD group:** validate the check box to allow the agent to change his assigned groups
- **Modify password:** validate the check box to allow the agent to change his password
- **Password:** enter a new password
- **Call Log:** validate this check box to delete call log information for this agent on the local machine

3. Click **Modify** to validate

4. Restart the application to take into account the modifications

To close the **ADMIN** connection: click **Close** at the bottom right of the window.

