

# Avaya one-X Agent User Guide

# Work-at-Home and JDZ Users

This document provides instructions on installing and using the Avaya one-X Agent application.

**Note:** Avaya one-X Agent is currently supported by Windows 7 32-bit or 64-bit with Service Pack 1; Windows 8 32-bit or 64-bit; Windows 8.1 32-bit or 64-bit; and Windows 10 32-bit or 64-bit.

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# Install Avaya one-X Agent

1. Log in to F5 MyAccess at <u>https://myaccess.jackson.com</u>. (If you have never used MyAccess before, see the <u>Windows instructions</u>. Avaya one-X Agent will not work on a Mac.)

Note: Before logging in, plug your USB headset into your computer.

2. Click the Avaya One-X Agent icon under Apps for Windows.



- Save the AvayaOneXAgent2.5.8.zip file to C:\Temp on your computer. It may take a few seconds for the file to save.
- 4. Go to the C:\Temp folder on your computer.
- 5. Right-click the AvayaOneXAgent2.5.8.zip file and select Extract All. Another window will open.
- 6. Click Extract. This will create a new folder in C:\Temp named AvayaOneXAgent2.5.8.



- 7. Click the folder to open it.
- 8. Double-click the **INSTALL.CMD** file for the one-X Agent to install on your computer. This will take about 30 seconds. Afterward, an **Avaya one-X Agent** icon will appear on your desktop.

퉬 etc	12/1/2015 10:46 AM	File folder
Directions for Install.txt	12/1/2015 10:44 AM	Text Document
🐼 INSTALL.CMD	12/1/2015 10:44 AM	Windows Comma
install.properties	10/7/2015 2:14 PM	PROPERTIES File
OneXAgentSetup.exe	10/7/2015 2:14 PM	Application

#### Note:

- If a window appears asking if you authorize the program to make changes on your computer, click **Yes**.
- If this dialog box appears, close all Internet Explorer windows and click OK.

Internet Explorer	
<ul> <li>Automatically close application setup is complete.</li> </ul>	ons and attempt to restart them afte



# **Configure Settings (one time only)**

1. Double-click the Avaya one-X Agent icon on your desktop.



2. Click Change Login Settings.

Change Login Settings	ОК	Cancel
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**Note:** You only have to change the settings one time. After you set them up, they will stay that way the next time you log in.

3. In the resulting window, fill in the fields as follows:

#### **Telephony tab**

- Extension: Type your station hardcode.
- **Password**: Type your password (same as the station hardcode).
- Server Address: Work-at-home associates must enter DC1PROCR. Associates at the Jackson Development Zone (JDZ) must enter JDZCLAN.
- User Type: Select Agent.
- Place and receive calls using: Select My Computer.

**Note:** If you are completing this setup in the office and hear a beep in your headset, select the **CM Auto Answer Support Required** box. This will allow you to log in with your Agent ID.

Extension	
23789	
Password	
••••	
✓ Save password during sign in	
CM Auto Answer Support Required	
✓ Warn for Another User Logged in at Extensi	0
Server Address	
DC1PROCR or JDZCLAN	
User Type	
Agent \$	
Place and receive calls using	
My Computer \$	



## Agent tab

- Agent: Type your agent extension.
- **Password:** Type your password (usually the same as the agent extension).
- Select Enable ACD Login.

Telephony Agent	IM
✓ Enable ACD Login	
Automatically sign into the ACD set Use the information that was last used for succe Agent	
22585	
Password	
••••	

4. Click Save Settings & Log in.

## Launch the Application

1. Double-click the Avaya one-X Agent icon on your desktop.



2. Click **OK**.

AVAYA oneX	=
Welcome	
Change Login Settings	OK Cancel

3. Type your station hardcode and password (same as the station hardcode) and click Log In.

AVAYA one×	
Login	
Extension	18613
Password	•••••
	Log in Cancel

4. Type in your agent extension and password click Log In.



AVAYA □□⊇≫			
Agent	22585		
Password	•••••		
		Log in	Cancel

5. After logging in, you will see a toolbar showing your phone extension and Agent ID extension.

─ 18613:22585	Auxiliary default
Manual-Accept	

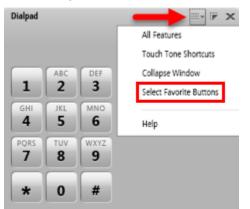
6. Click the **Dial pad** icon.

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7. Click the arrow icon to expand the dial pad.



8. Click the Options icon and choose Select Favorite Buttons.



- 9. You can select up to eight buttons to display on your dial pad. The following five buttons are recommended:
  - **Auto In:** accept a call in Auto-Accept mode
  - AfterCall: end a call in After Call Work (ACW) mode
  - **AuxWork:** set the agent status to auxiliary mode; used to refuse an Automatic Call Distributor (ACD) call



- Logout: log out of Avaya one-X Agent
- Normal: place the station display into normal call identification mode

#### 10. Click **OK**.

Select up to 8 buttons from th Auto In AfterCall AuxWork QueueCall 184 QueueCall 983 QueueCall 190 OueueCall 12	ne lis	st below:  Auto In  AfterCall  AutWork  Logout  normal
QueueCall 105 Release	•	OK Cancel

Your dial pad and toolbar will look like the ones below so you can see if you are in **Available**, **After-Call**, **Busy**, **Logout**, or **Normal** mode.

Dialpad			≡• 🖬 🗙	٢	<del>-</del> 23789:2	2585	Auxiliary Personal	¥ 斗	×
			Θ	-					
			0	0	Auto In 🕴 😑	AfterCall 🕴 🖯	AuxWork 🕴 🖯 QueueCall 184	🖯 🖯 VU Display 2 🛛 🖯 VU Disp	play 18 🚦
			0	.   0	Logout 🕴 😑	normal			
	ABC	DEF	Auto In 📢		Manual-Accept				
	2	3	AfterCall	i	Manual-Accept				
GHI	JKL	MNO	e AuxWork						
4	5	6	😑 QueueCall 184						
PQRS	TUV	WXYZ	😑 VU Display 2	œ			Q- 🛄 📖 🖾	AVAYA	one×
7	8	9	😑 VU Display 18						
			😑 Logout						
*	0	#	😑 normal						
				1					

# Set up Reason Codes

Set a reason code to show when you are unavailable. If you are not taking calls, set the **Aux** reason code. If you are going to lunch or leaving the office for the day, set the **Log Out** reason code. To set a reason code:

1. Click the **Options** icon in your toolbar and select **System Settings**.

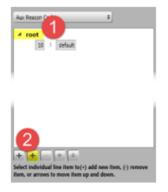
	10	Agent Preferences	Ctrl+P
Manual-Accept		System Settings	Ctrl+T
00:01:02 Auxiliary default		Help	F1
*	Q- W (# D D	AVAYA About Avaya one-X A	gent
		Station Disconnect	Ctrl+Shift+S
		Exit	



2. Under System Settings, click Reason Codes.

Directory
Work Log
Desktop Integration
Voice Mail Integration
Reason Codes
Event Logging
Outlook Contacts
Dialing Rules
Touch Tone Shortcuts
Profiles

- 3. Select the reason code type from the drop list.
- 4. Select **root** and click the second plus sign at the bottom of the window.



5. Type the number of your reason code and a description as shown below.



Note: To set other reason codes, select a different option from the menu.

6. Click **OK** when finished.

# Using Avaya one-X Agent

## Make a Call

There are two ways to place a call:

• Type the phone number/extension in the text field at the bottom of the Avaya one-X window and press **Enter**.







## **Receive a Call**

To answer a call, click the green phone icon.

- 18613:22585	Auxiliary default	∦
Alerting		t.
ờ Telecom Cube C1G14	23789	

## Hold or Transfer a Call

After answering a call, additional icons will appear next to the call:

		Hold call End call
4	00:00:02	Ľ J Å
		Transfer call
		fransfer oan

#### Hold Call

- 1. Click the **Hold call** icon to place a call on hold.
- 2. Resume the call by clicking the green **Unhold Call** icon.



#### **Transfer Call**

To **cold transfer** a call:

- 1. Click the **Transfer Call** icon.
- 2. Type the extension of the person to whom the call should be transferred in the text field.
- 3. Click the **Transfer** icon next to the field to confirm the transfer.

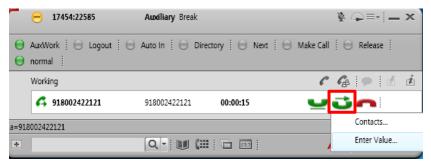
*	Working: Baker, Justin			<b>16</b> 🖗 🕬 👘
	*	23278	00:01:12	
a=	Xay Lawren to Baker, Ju	istin f 3		
	23243	S - W (	III 🖬 🖬	AVAYA one <del>x</del>

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#### To warm transfer a call:

- 1. Click the **Transfer Call** icon.
- 2. Type the extension of the person to whom the call should be transferred in the text field.
- 3. Click the Transfer Call icon and choose Enter Value.



The first party will be put on hold while the system dials the third party. The new call will be shown under the first call within the same work item.

Working			C G 🇭 🖻 🖻
918002422121	918002422121	00:00:11	1
💪 Palmer Doug	23243	00:00:10	y J n

- 4. Wait for the third party to answer the call and ask if they would like to accept the transfer.
  - If the third party accepts the call, click the **Consultative Transfer** icon for the call to be transferred.

Working			C G 🗭 🖻 🗄	
🐭 Voice Mail	<b>co\</b> 23800	00:00:13		
💪 Palmer Doug	23243	00:00:12	u <mark>u </mark> n	
b=Palmer, Doug 2324	}		Consultive Transfer	
•	Q - 💵	(*** 🗀 💷	AVAYA onex	

• If the third party rejects the call, click the **End Call** icon for that call and click the **Unhold Call** icon for the first call.

#### **Conference Someone into a Call**

1. Place the current call on hold by clicking the **Hold Call** icon.

Working		
<b>6</b> 92908589	00:01:24	- U -

2. Type the phone number/extension of the person to be added to the call in the text field and press **Enter**.

8 <b>#</b> 8	23243	२ - 💓 (🎟 🖻 📼	AVAYA one×
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3. Next to the name/number of the person you just dialed, click the **Conference** icon and select the phone number/extension of the person you have on hold.

Working	Working					
92908589	92908589	00:04:42	C	a		
Working			6 6	i d d		
🕰 Palmer Doug	23243	00:00:23		92908589		
b=Palmer, Doug 23243				Contacts		
	Q • 🔳		A	Enter Value		

4. All parties will be listed within the conference. To add additional people to the call, repeat the steps above.

Worki	ng			С	4 🗩 🖻 🖻
	Conference		00:00:07	G 🚽	-
	Palmer Doug	25243			I
	92908589	92908589			-

**Note:** You can choose to either end a call with one of the participants or end the entire conference by selecting the **End Call** icon **•••** next to a specific participant or next to the **Conference** line, respectively.

#### **View Call History**

Click the **Work Log** icon to view your call history. The list of calls will display at the bottom of the window.

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# Log out of the Application

## **Lunch Break**

• Click **Logout** and type your logout reason code.



 If you would rather go into Aux (Busy) mode, click Logout > Auxiliary. Then choose the appropriate reason code.

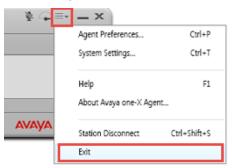


Note: If you are unsure which mode to use during lunch, talk to your manager.



## End of the Day

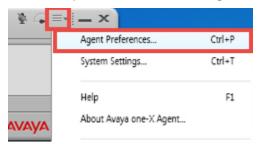
• Click the **Options** icon and select **Exit**.



# **Additional Recommended Settings**

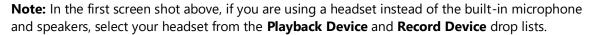
Follow the steps in this section to optimize your One-X Agent settings.

1. Click the **Options** icon and select **Agent Preferences**.

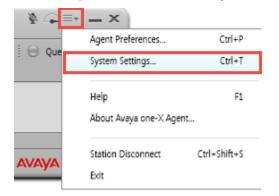


2. Check your **Audio**, **Call Handling**, and **User Interface** settings to ensure they match up with what is shown below.





3. Click the **Options** icon and select **System Settings**.



- 4. Check your **Login** settings to ensure they match what is shown in the screen shots below.
  - Telephony tab: For the Server Address field, work-at home associates must enter DC1PROCR. Associates at the Jackson Development Zone (JDZ) must enter JDZCLAN. Make sure Agent is selected under User Type and My Computer is selected under Place and receive calls using.
  - Agent tab: Select the boxes next to Save password during sign in and Enable ACD Login.

System Settings	? ×	System Settings	? ×
System Settings Login Alternate Server List Phone Numbers Work Handling Greeting Triggers VuStats Screen Pop Launch Applications Directory	? ×       Login       Telephony     Agent       Enable automatic connection to Communication       Manager       Use the information that was last used for successful registration       Extension       23789       Password	Login Alternate Server List Phone Numbers Work Handling Greeting Triggers VuStats	? ×       Login       Telephony     Agent       IM       Image: Comparison of the ACD server       Use the information that was last used for successful ACD connection       Agent       122585
Work Log Desktop Integration Voice Mail Integration Reason Codes Event Logging Outlook Contacts Dialing Rules Touch Tone Shortcuts Profiles	Password  Save password during sign in  CM Auto Answer Support Required  Warn for Another User Logged in at Extension  Server Address  DC1PROCR or JDZCLAN  User Type  Agent  Place and receive calls using  My Computer  Changes will take effect at the time of login	Work Log Desktop Integration Voice Mail Integration Reason Codes Event Logging Outlook Contacts Dialing Rules Touch Tone Shortcuts Profiles	Password ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ● ●
	OK Cancel		OX Cancel

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 Check your Work Handling and Voice Mail Integration settings to ensure they match what is shown in the screen shots below. For Voice Mail Integration, type 23800 in the Dial this number field, regardless of your location.

		System Settings		? :	~
System Settings ? 🗙				£ .	
Login Alternate Server List Phone Numbers	Work Handling Basic Advanced	Login Alternate Server List Phone Numbers	Voice Mail Integration Voice Mail Integration		
Work Handling Greeting Triggers Screen Pop Launch Applications Directory Work Log Desktop Integration Voice Mail Integration Reason Codes Event Logging Outlook Contacts Dialing Rules Touch Tone Shortcuts Profiles	Work Items Auto-Accept Manual-Accept Communication Manager Ready Mode Auto In Manual In Do not change these default settings without consulting with your system administrator.	Work Handling Greeting Triggers Screen Pop Launch Applications Directory Work Log Desktop Integration Voice Mail Integration Reason Codes Event Logging Outlook Contacts Dialing Rules Touch Tone Shortcuts Profiles	When Voice Message Indicator is clicked:  Dial this number  23800  Start this application  Browse  Open web page		
	OK Cancel		OK Car	ncel	

## Work Handling

## **Voice Mail Integration**

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# **Questions?**

For additional assistance, detailed Avaya instructions can be found under **System Options** > **Help** on the one-X Agent toolbar.

If you are experiencing issues, call the Service Desk at ext. 2HELP or 517-367-HELP. Dial toll-free at 800-565-9044, ext. 2HELP. For non-urgent issues, you may also submit a request form in <u>MyIT</u>.