Lucent Technologies
Bell Labs Innovations

CentreVu IP Agent Installation and User Guide

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CentreVu **IP Agent Installation and User Guide**

585-215-110   Issue 1   March 2000

1   Please rate the effectiveness of this information product in the following areas:

	Excellent	*Good*	*Fair*	*Poor*	*Not Applicable*
Ease of Use	☐	☐	☐	☐	
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☐ Improve the overview/introduction   ☐ Make it more concise/brief
☐ Improve the table of contents   ☐ Add more step-by-step procedures/tutorials
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☐ Include more figures   ☐ Make it less technical
☐ Add more examples   ☐ Add more/better quick reference aids
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Please provide the details for the suggested improvement. ....
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When you have completed this form, please fold, tape, and return to address on the back or fax to (U.S.) 407 767 2760.

Contents

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About this information product

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Purpose	The *CentreVu* IP (Internet Protocol) Agent Installation and User guide includes information that you need to know in order to install and use *CentreVu* IP Agent (IP Agent). It also includes a job aid that you can refer to when starting to use IP Agent and information on performing administrative tasks.
	This guide does not provide information on how to use *CentreVu* IP Agent as a telephone. Please refer to your agent training guide.
Reason for reissue	This is issue 1 of this document.
Safety labels	This is not applicable to this guide.
Intended audience	This guide is intended for anyone who is installing and/or using the *CentreVu* IP Agent software and performing station administration on the *DEFINITY*® ECS (Enterprise Communications Server). It assumes that you are familiar with your computer and the *Windows*® 95, *Windows* 98, *Windows* 2000, or *Windows NT*® 4.0 operating systems, including standard *Windows* conventions, such as using the F1 key to activate Help.

....

Conventions used   The following Conventions are used in this document:

Convention	Description
Initial Capital Letters	Names of windows, dialog boxes, and keyboard keys. For example, The Name field is in the Properties dialog box.
KEY+KEY	Key combinations for which you must press and hold down one key and then press another key at the same time. For example, Ctrl+F4 means that you press the Ctrl key and F4 key at the same time.
Italic Text	References to other documents, trademarks, and for emphasis.
" "	Sections and chapters that are referenced. For example, See "Chapter 2, Installing IP Agent," for information how to install the software.
Click and Double click	Whenever you are asked to click or double click the mouse button, click button 1 (the left-most mouse button or primary button), unless button 2 (the right-most button or secondary button) is specified.
Microsoft® *Windows* or *Windows*	These terms are used to refer to *Windows* 95, *Windows* 98, *Windows* 2000, or *Windows NT* 4.0.
IP Agent	This term is used throughout the manual to refer to *CentreVu* IP Agent.

Related documentation   There are many documents that can help you use the IP Agent software. The most important documents are listed below:

- *CentreVu Call Management System Release 3 Version 6 Administration Volumes 1 and 2* (585–215–850)

- *DEFINITY Enterprise Communications Server Release 8.1 Administration and Feature Description Issue 4*(555-230-522)

- *DEFINITY Enterprise Communications Server Automatic Call Distribution (ACD) Supervisor Instructions Issue 4*(555-230-724)

- *DEFINITY Enterprise Communications Server Automatic Call Distribution (ACD) Agent Instructions Issue 5*(555-230-722)

1   Introduction

Overview

Purpose   *Introduction* provides basic information about IP Agent and provides preparation information that will assist you when installing the application.

Introduction includes the following topics:

- About *CentreVu*® IP Agent [1-2]
- *CentreVu* IP Agent Job Aid [1-9]

☐

About *CentreVu* IP Agent

Introduction   The Lucent Technologies IP Agent software provides a solution for agents like you who want to work remotely from their homes. In order to work remotely, you need to have access to the switch features that are used in the call center. IP Agent provides a graphical user interface (GUI) to the *DEFINITY*® ECS, which lets you use the *DEFINITY* ECS features that have been administered for your station. You use IP Agent in conjunction with an analog phone for voice connection.

Important! If you need to dial your emergency access number in an emergency, hang up your IP Agent voice phone and dial your access number as you would normally dial it from a regular phone. Do not use your IP Agent phone in an emergency.

IP Agent Features   From the IP Agent window, you can:

- Make calls.

- Answer calls.

- Place calls on hold.

- Hang up calls.

- Transfer calls.

- Reconnect a held call.

- Set up and manage conference calls.

- Program speed dial buttons.

- Set IP Agent to use call handling features such as Auto Call back, Call Answer Back, Call Forwarding, Call Park, Call Pickup, Send All Calls, Redirect, and Transfer to AUDIX. These features must be administered on your extension by your *DEFINITY* ECS system administrator.

- Place calls from the Phone Directory or Call History dialog box.

IP Agent Main Window   The IP Agent application has been designed with your convenience in mind. The main window is a single-view graphical user interface (GUI) that incorporates buttons, pull-down menus, and a mouse.

The main window has a menu bar, toolbars, and panels. It also includes an area in which you can record call information. You can minimize or close this window.

All window sizes and open dialogs are saved on exiting the window. When you open the main window the next time, it will look exactly the same as it did when you closed it, including the same location, size, and open dialogs.

The main window looks like this:
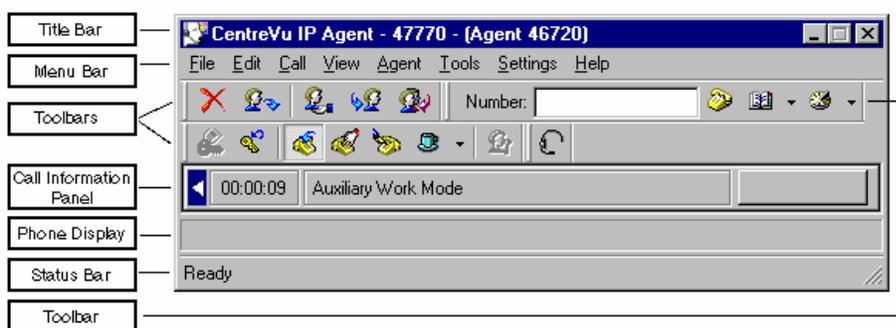
The main window contains the following components:

- Title Bar: Contains the application name followed by the extension of the phone (for example, CentreVu IP Agent - 47770). If you have logged in, your agent ID will also be included on the title bar (for example, [Agent 46720]). In the above example, the agent is logged and is in Auxiliary Work Mode (not on a call). If he or she were on a call, the string on the title would contain the same information displayed on the Call Information Panel (CIP).

- Menu Bar: Contains a row of menu options, any of which you may select to display a menu.

- Toolbars: Contain a row of buttons used to activate various functions of the IP Agent application. The IP Agent main window can contain as many as five toolbars.

- Call Information Panel (CIP): Provides information about a single call, such as name, call duration, status icon, and control buttons (for example, Answer/Release and Reconnect).

- Phone Display: Receives information from the *DEFINITY* ECS such as user-entry prompts, call prompting digits, and VuStats data.

- Status Bar: Displays IP Agent application status and tooltips.

Toolbars

The following toolbars are associated with the IP Agent main window—Phone Button, Dial Number, Agent, and Headset. These toolbars contain buttons that you can use for quick access to specific commands and tools.

Examples of the toolbars containing callouts of the names of each button are shown below. For more information on the toolbars, see Displaying Toolbars and Dial Pad [6-11].

Phone Button Toolbar
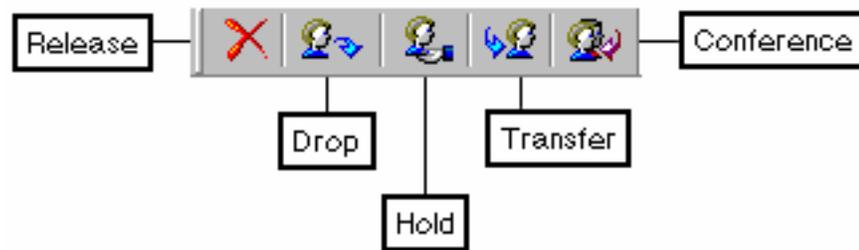
Dial Number Toolbar

Agent Toolbar
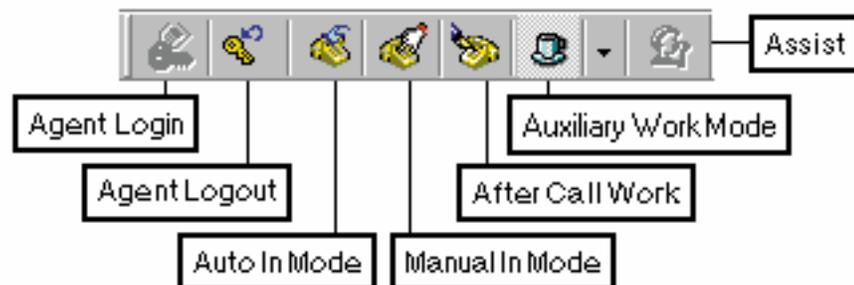
Headset Toolbar
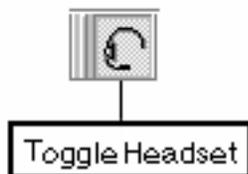
Supported Phone Sets   Here is a list of phone sets that Lucent Technologies supports for use with IP Agent. You may use other phone sets; however, phone sets other than those on the following list may not function correctly and are not supported by Lucent Technologies.

- *CALLMASTER*® II—602A1

- *CALLMASTER* III—603A1, 603D1, and 603E1

- *CALLMASTER*—603F1

- *CALLMASTER* V—607A1

- *CALLMASTER* VI—606A1

- 6408D+

- 6408D

- 6416D+

- 6416D+ with expansion module

- 6424D+

- 6424D+ with expansion module

- 8405D+

- 8405D

- 8410D

- 8411D (For this phone set, you have to disable the data port, which is true for all softphones.)

- 8434D

- 8434D with expansion module

Supported International Versions of IP Agent

This table shows which language versions of IP Agent are supported with which *Windows*® operating systems. (The symbol X indicates that the operating system is supported). This table is divided into Part 1 and Part 2.

Windows Operating System		CentreVu IP Agent Languages - Part 1						
		English	Italian	French	German	Portuguese (Brazilian)	Spanish (Columbian)	Japanese (Proper)
English	Win95	X	X	X	X	X	X	
	Win98	X	X	X	X	X	X	
	Win2000	X	X	X	X	X	X	
	WinNT	X	X	X	X	X	X	
Italian	Win95	X	X					
	Win98	X	X	X				
	Win2000	X	X					
	WinNT	X	X	X	X	X	X	
French	Win95	X		X				
	Win98	X		X				
	Win2000	X		X				
	WinNT	X		X				
German	Win95	X			X			
	Win98	X			X			
	Win2000	X			X			
	WinNT	X			X			

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This is Part 2 of the *CentreVu* IP Agent Languages table.

Windows Operating System		English	Italian	French	German	Portuguese (Brazilian)	Spanish (Columbian)	Japanese (Proper)
Portuguese	Win95	X				X		
	Win98	X				X		
	Win2000	X				X		
	WinNT	X				X		
Spanish	Win95	X					X	
	Win98	X					X	
	Win2000	X					X	
	WinNT	X					X	
Japanese	Win95	X						X
	Win98	X						X
	Win2000	X						X
	WinNT	X						X

Installation Support and Tips

If you have difficulty installing IP Agent, refer to the following sources:

- System requirements specified in What You Need on Your Computer [2-2].
- The readme.txt file on the CD-ROM. Use an editor such as *Windows* Notepad to read the file.

If you have further questions, contact the Lucent Technologies National Customer Care Center on 1-800-242-2121. For international support, call your Lucent representative or distributor for assistance.

The CD-ROM in your package includes a graphical installer to help you install your copy of IP Agent. The CD-ROM also supports *Windows* AutoPlay. If AutoPlay is enabled on the PC, insert the CD-ROM into the drive and the *CentreVu* IP Agent Install program starts automatically.

You can cancel the installation at any time by selecting Close from the control menu or pressing Alt+F4. You can also cancel the installation by selecting the Cancel button at the bottom right of the installation window. The installation program will exit installation and remove any files that were built by the program.

CentreVu IP Agent Package Contents

The *CentreVu* IP Agent software package includes a CD-ROM that contains the IP Agent software and folders that contain material such as documents and tools. Read the readme.txt file in each folder for more information about the contents of the folder. The documents contained in the documents folder are Portable Document Format (PDF) documents. Adobe Acrobat Reader 3.0 is required to view PDF documents.

US English Only IP Agent Components

The following IP Agent components are only provided in the English language:

- Installation
- Help About Screen
- Event log
- IP Agent internal files
- Shortcut keys for secondary callbars
- Readme file

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CentreVu IP Agent Job Aid

Quick Reference Use this job aid to quickly begin using IP Agent.

1. To log into IP Agent, double click on the *CentreVu* IP Agent icon.

2. Enter your virtual Extension and Password on the DEFINITY® Login window. You need your IP Address or host name and the call back number for the voice connection.

3. Click the Log In button.

4. If IP Agent doesn't log in, select File and then select DEFINITY Login in the CentreVu IP Agent window.

5. To log in as an agent, first make sure the phone next to your computer is hung up. Click the gold key (Agent Login button) or press Ctrl+Insert. Enter your Agent ID and Password, and then press the Enter key.

6. The phone next to your computer rings. Answer the call and you will hear the confirmation tone. The Agent buttons on the CentreVu IP Agent window light up.

7. To start taking calls, click the Auto-In button (gold phone with arrow) or press Ctrl+I.

8. To take your break, click the arrow associated with the AUX button (blue cup), and select the reason code, if appropriate.

9. To log out, click the Agent Logout button (gold key with arrow) and enter the logoff reason number code, if appropriate.

Using Shortcut Keys Shortcut keys refer to key combinations, such as Ctrl+H, that you can use to invoke a particular command.

Call Features

Some of the most commonly used shortcut keys are discussed below.

1. To put a call on hold, press Ctrl+H. To reconnect to the caller, click the Reconnect button or press the space bar.

2. To transfer a call, press Ctrl+T, and then dial the number using the keyboard. When you are ready to complete the transfer, press Ctrl+T again.

3. To conference another person into the call, press Ctrl+F, and then dial the number using the keyboard. When ready to add the new person to the call, press Ctrl+F again.

Toggling Between Applications

To toggle between applications, press Alt+Tab until the desired application is showing.

Calling the Help Desk

To call the Help desk, press Ctrl+T, and dial xxxx. If you want to transfer the call to the Help desk, press Ctrl+T again. Otherwise, click the Release button to release the call to the Help desk; then click the Reconnect button to reconnect to the held call.

Exiting IP Agent

To exit IP Agent, first log off as an agent, then click the small x in the top right corner of the IP agent window. Then right-click the phone in the tool bar at the bottom right corner of your screen. Select "Log off & exit DEFINITY Login."

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2 Installing IP Agent

Overview

Purpose *Installing IP Agent* explains how to install the IP Agent on your computer from the CD-ROM or the network.

The following topics are included:

- Before You Begin [2-2]
- Installing from the CD-ROM [2-3]
- Installing from the Network [2-13]

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Before You Begin

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Introduction *Before You Begin* provides the tasks you need to perform and the information you need to know before installing IP Agent.

Methods of Installation There are two methods you can use to install the IP Agent application on your computer:

- CD-ROM Installation—installing the application onto your computer from the CD-ROM.

- Network Installation—installing the application onto your computer from a network. This is a two-step process that consists of copying the installation program to the network and then installing across the network onto your computer.

What You Need on Your Computer A computer running *CentreVu*® IP Agent software must meet the minimum recommended requirements listed below.

Hardware Requirements

Your computer must meet or exceed the following configuration:

- *Intel Corporation Pentium*® II processor, 200 MHz or greater
- 32 megabytes of RAM
- SVGA with 640x480 resolution or higher
- 28.8K Modem for the remote IP connection
- CD-ROM drive

Software Requirements

Your computer has to be running one of these operating systems:

- *Windows*® 95
- *Windows* 98
- *Windows NT*® with Service Pack 4
- *Windows* 2000

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Installing from the CD-ROM

Introduction	The *CentreVu* IP Agent CD-ROM supports the *Windows* AutoPlay feature. If AutoPlay is enabled on the PC, insert the CD-ROM into the drive, and the IP Agent Setup program will start automatically.

See your system administrator for information on how to enable or disable AutoPlay on your PC.

Procedures To install IP Agent from a CD-ROM, do the following:

1 Before starting the installation, close all running programs on the computer. If you do not close all running programs, a warning may appear asking you to reboot your computer.

2 Insert the CD-ROM into the drive you want to install from.

3 If AutoPlay has started, go to Step 6. If you are not using AutoPlay, continue with Step 4.

4 Click Start on the taskbar and select Run.

> **Result:**
>
> The Run dialog box appears.

5 In the Open text box, enter the drive you are installing IP Agent from, followed by \setup (for example, f:\setup), and then select OK.

> **Result:**
>
> A setup message appears informing you that IP Agent is preparing the wizard that will guide you through the setup process.

....

6   The splash screen appears briefly.
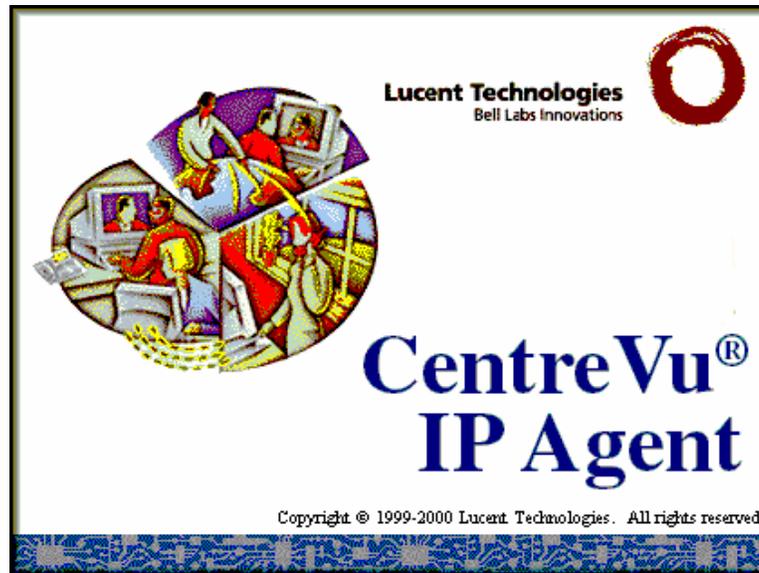
Result:

Next, the Welcome window appears.

....

....
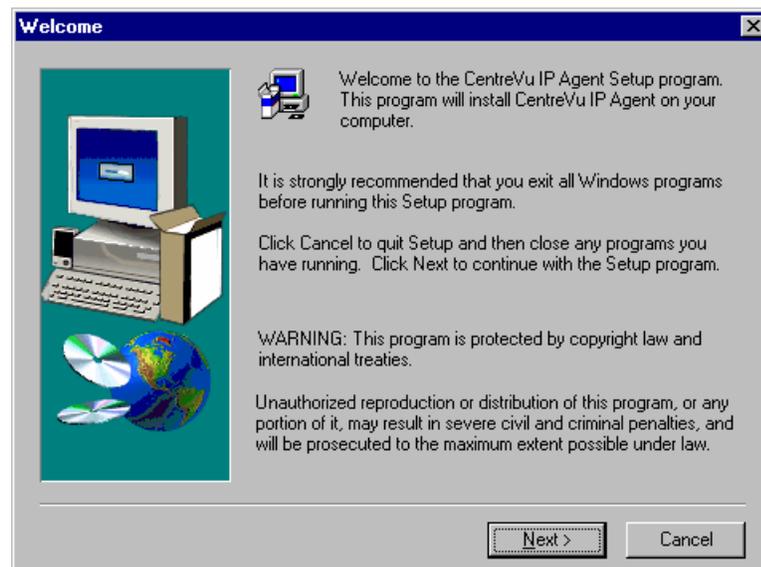
7   Select Next to continue with the installation.

Result:

The Software License Agreement dialog box appears.

....
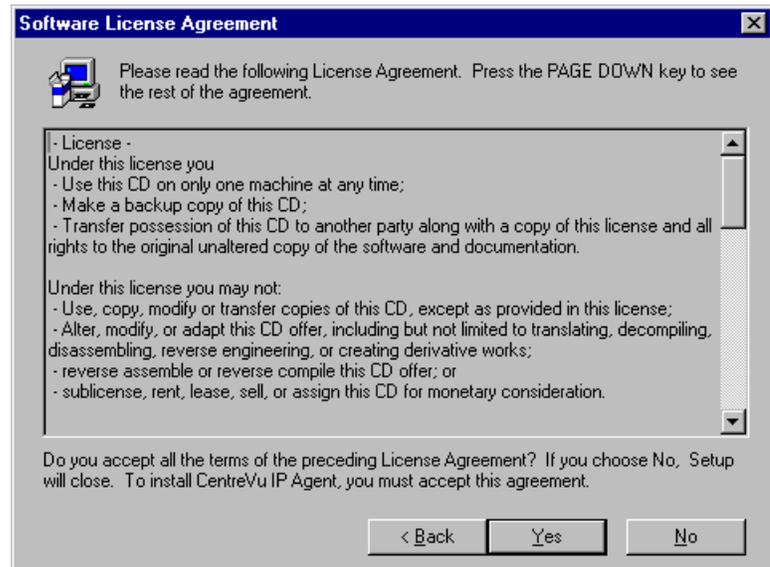
8   Select Yes to accept all the terms of the License Agreement, or No to exit the installation.

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Result:

If you select Yes, the Choose Destination Location dialog box appears.

....
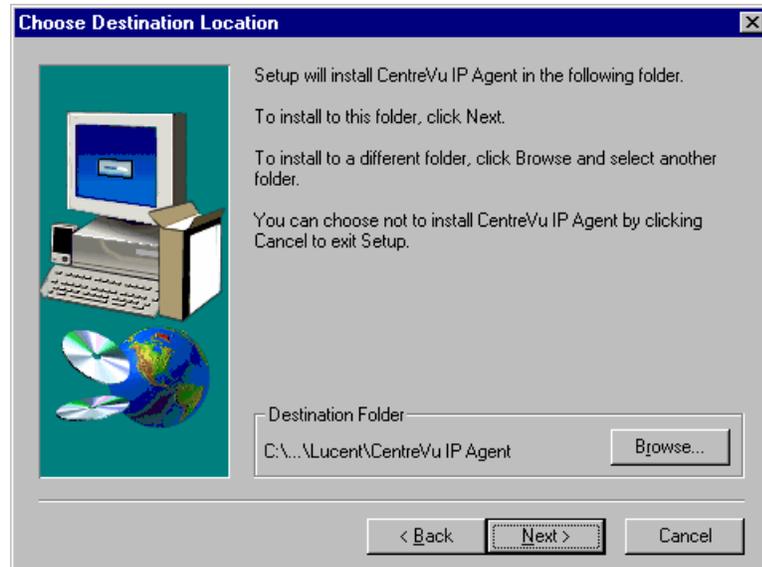
9   In the Choose Destination Location dialog box, choose one of the following:

- If you want to install the software in the default destination folder, select Next, and go to Step 11.

- If you want to select a different destination folder in which to install the software, click Browse.

   Result:

   The Choose Folder dialog box appears.

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10 In the Choose Folder dialog box, select the destination folder you want and click OK.

....

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Result:

The Setup Type dialog box appears.

....
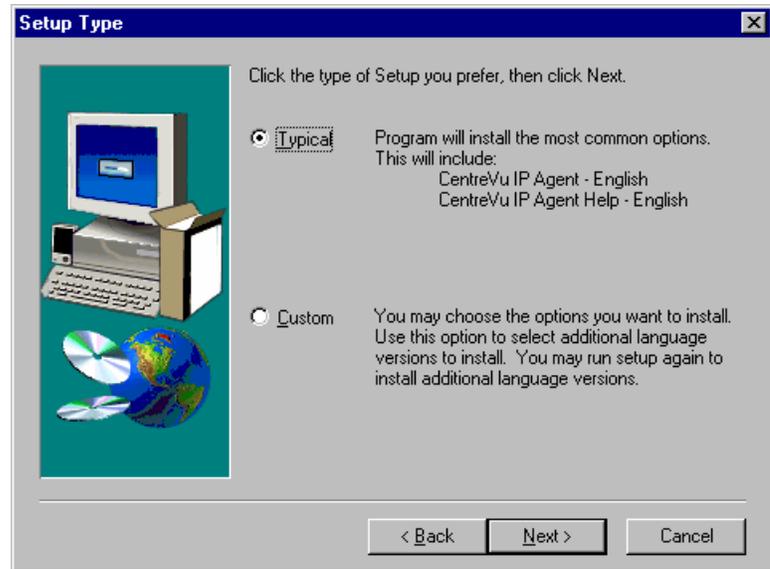
11 In the Setup Type dialog box, select the type of installation and click Next.

- Typical—this selection will install all of the basic options in English, which is required, as well as all of the basic options in the language of your supported *Windows* operating system.

- Custom—this selection lets you choose which options and language versions to install.

....

12 If you selected Typical, go to Step 16.

....

13 If you selected Custom, the Select Components dialog box appears.

....

14 Before making your selections, read the bottom half of the dialog box. It provides the following information:

- The space required for each component

- The total space available on the specified drive

....

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Important! See Supported International Versions of IP Agent [1-6] for more information about which languages are supported with which version or operating system of IP Agent.

....

15 Click the component languages that you want to install.

....

16 Select Next.

> **Result:**
>
> The Select Program Shortcuts dialog box appears.

....

17 Indicate whether or not you want IP Agent shortcuts by clicking any of the following:

- Add shortcuts to the Windows desktop.
- Add shortcuts to the Start Menu.

....

18 In the list of languages box, highlight the language you want to be used for the program shortcuts. For example, in the Select Program Shortcuts dialog box above, "CentreVu IP Agent – English" is highlighted.

> **Important!** If you click a shortcut box but do not select a language, a warning appears telling you to pick at least one language.

....

19   Indicate whether you want to automatically start CentreVu IP Agent when Windows is started (checked by default).

Important! If you are using a dial-up modem with a dynamic IP (Internet Protocol) address, do not start IP Agent at Windows startup.

....

20   Select Next.

Result:

The Start Copying Files dialog box appears. This dialog box displays the setup options that you have chosen.

....
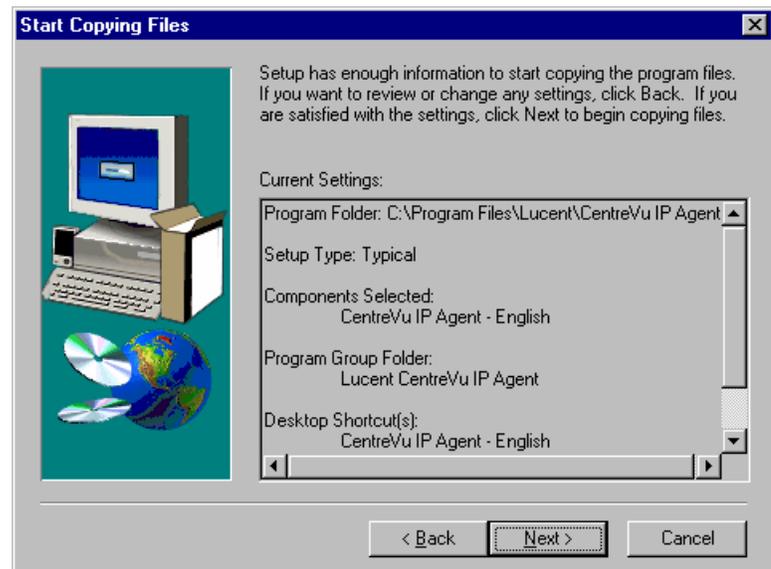
21   If you are satisfied with the setup options, select Next.

Result:

The Completion Status dialog box displays the components and files that are being copied.

....
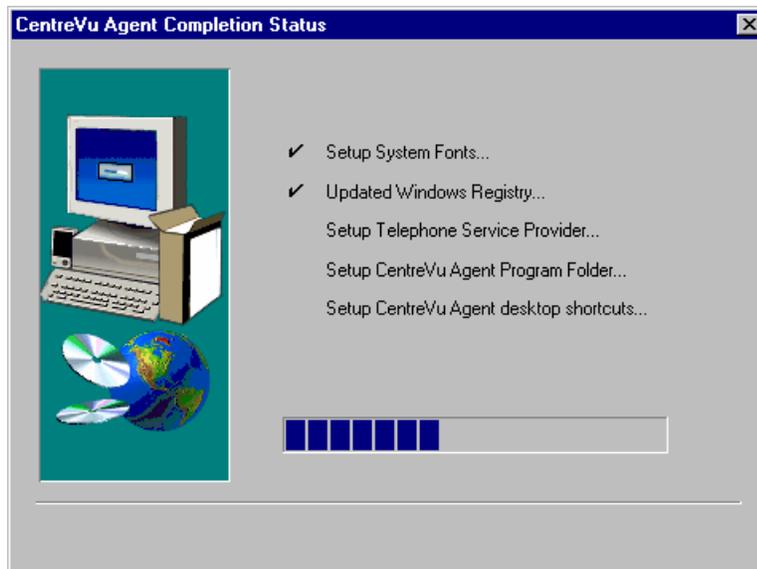
22   The Lucent Configurator dialog box appears. Select OK.

Result:

The Microsoft Common Controls dialog box appears.

....

23   You must install the *Microsoft Corp. Microsoft*® DLLs which are needed to run IP Agent. Select Yes to continue.

....

24   In the Microsoft COMCTL32.DLL Update screen that appears, select Yes to install the DLL update.

....

....

25   The *Microsoft* license agreement appears. Select Yes if you want to accept the terms of the license agreement.

> **Result:**
>
> The *Microsoft* DLL update has been installed. Select OK to continue.

....

26   You are asked if you want to restart your computer. Select Yes.
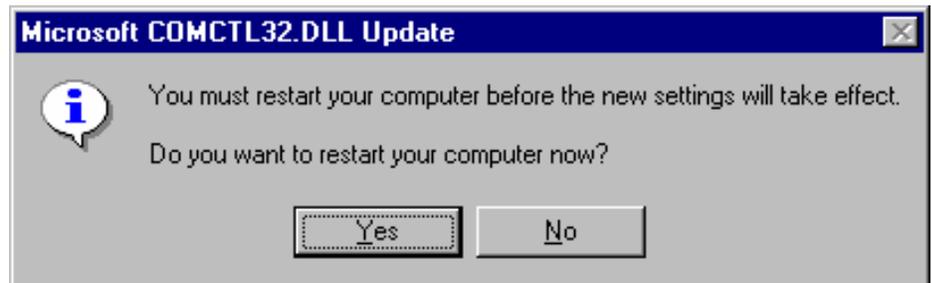
Important! Selecting Yes does not mean that your computer will be automatically restarted at this time. You will need to restart it when you complete the setup.

....

27   After the files have been copied, the Setup Complete dialog box appears.

....

Result:

....
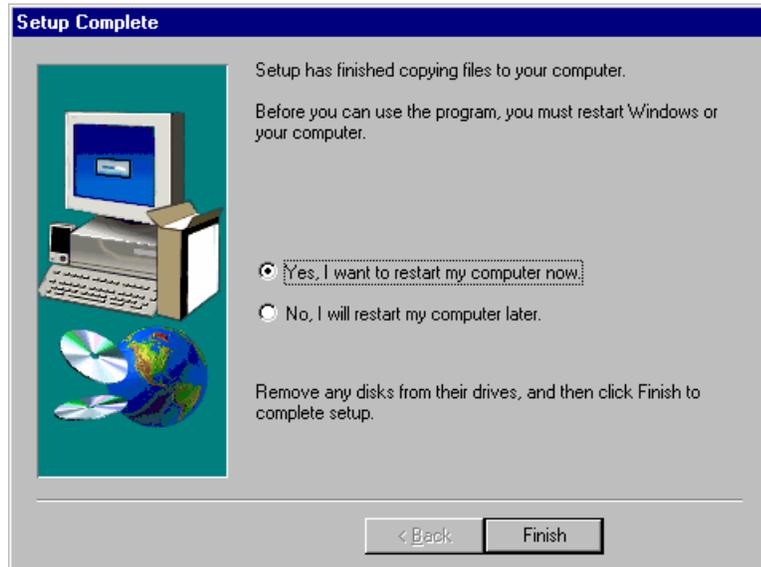
28 Click Finish to complete the setup, and restart your computer.

E N D   O F   S T E P S

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Installing from the Network

Introduction Use these procedures to copy the IP Agent installation program onto a Local Area Network (LAN), and then install the program across the network onto your personal computer.

Setting Up the Network To set up the network, do the following:

1   At a computer that is connected to the network, insert the *CentreVu* IP Agent CD-ROM into the CD-ROM drive.

    Important! If AutoPlay is enabled on the PC, the IP Agent Setup program will start automatically after you insert the CD-ROM into the drive. In this case, cancel the auto-install by clicking the Cancel button in the setup window that displays.

2   Open *Windows* Explorer.

3   Create a folder on the network drive, and record the path to the folder for later use.

4   Set your *Windows* Explorer options to "Show all files." In Explorer, select View. Then select Options and click Show all files.

5   Using the Copy command or drag-and-drop, copy the contents of the CD-ROM to the folder you created in Step 4. Be sure to copy all of the files.

6   Verify that the network where you copied the contents of the distribution medium is available to each computer that will be installing IP Agent from the network.

7   Go to Setting Up the Computer [2-14].
    E ND   OF   S TEPS

Setting Up the Computer   To install IP Agent on each computer from the network, do the following:

....

1   Before starting the installation, close all running programs on the computer.

....

2   In *Windows* Explorer, go to the drive and then the folder containing the *CentreVu* IP Agent files.

Important! You may want to map the network drive containing the IP Agent folder to your computer.

....

3   Locate and double click the *setup.exe* file to begin the installation.

Additional accessory files that reside on the CD-ROM, although copied to the network drive, will not be installed on the computer.

....

4   Follow the directions provided by the installation wizard.

....

5   If you want to follow a step-by-step description of the installation, go to Installing from the CD-ROM [2-3].

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3 Uninstalling IP Agent

Overview

Purpose You can easily uninstall the IP Agent application using the *Microsoft®* *Windows®* Add/Remove Programs wizard. Uninstall removes the IP Agent files (all installed languages), the folders, and the PassageWay Telephony Service Provider from the computer. Read-only folders that are shared with other applications are not removed.

Performing the Uninstall [3-2] explains how to perform an IP Agent uninstall from a network server or a stand-alone PC.

☐

Performing the Uninstall

Procedures To uninstall the IP Agent application, do the following:

1 Close all running programs on the computer.

2 From the Control Panel, double-click the Add/Remove Programs icon. The Add/Remove Program Properties box appears.
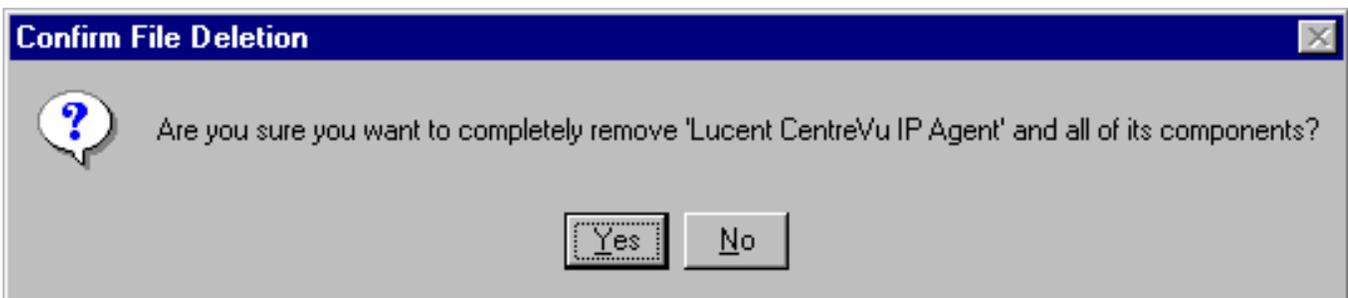
3 Click the Install/Uninstall tab if not already selected.

4 Click the Lucent CentreVu IP Agent entry in the list of software that can automatically be removed by *Windows*.

5 Click the Add/Remove... button.

  Result:

  The Confirm File Deletion message box appears.

6 Select Yes to remove the CentreVu IP Agent application.

  Result:

  The unInstallShield wizard begins and the Remove Programs From Your Computer dialog box appears. The Uninstall program enters a check by each component after it is removed.

7 Whenever the uninstall program encounters a shared file that is no longer shared by a program, you are asked whether you want to remove the shared file.

Select one of the following options:

- Yes—deletes the shared file

- Yes To All—deletes all remaining shared files

- No—does not delete the shared file

- No to All—does not delete the remaining shared files

Important! If you selected Yes or No, the uninstall program continues to display the Remove Shared File? dialog box every time it encounters a shared file.

Result:

When the uninstall is complete, the message "Uninstall successfully completed" appears at the bottom of the Remove Programs From Your Computer dialog box.
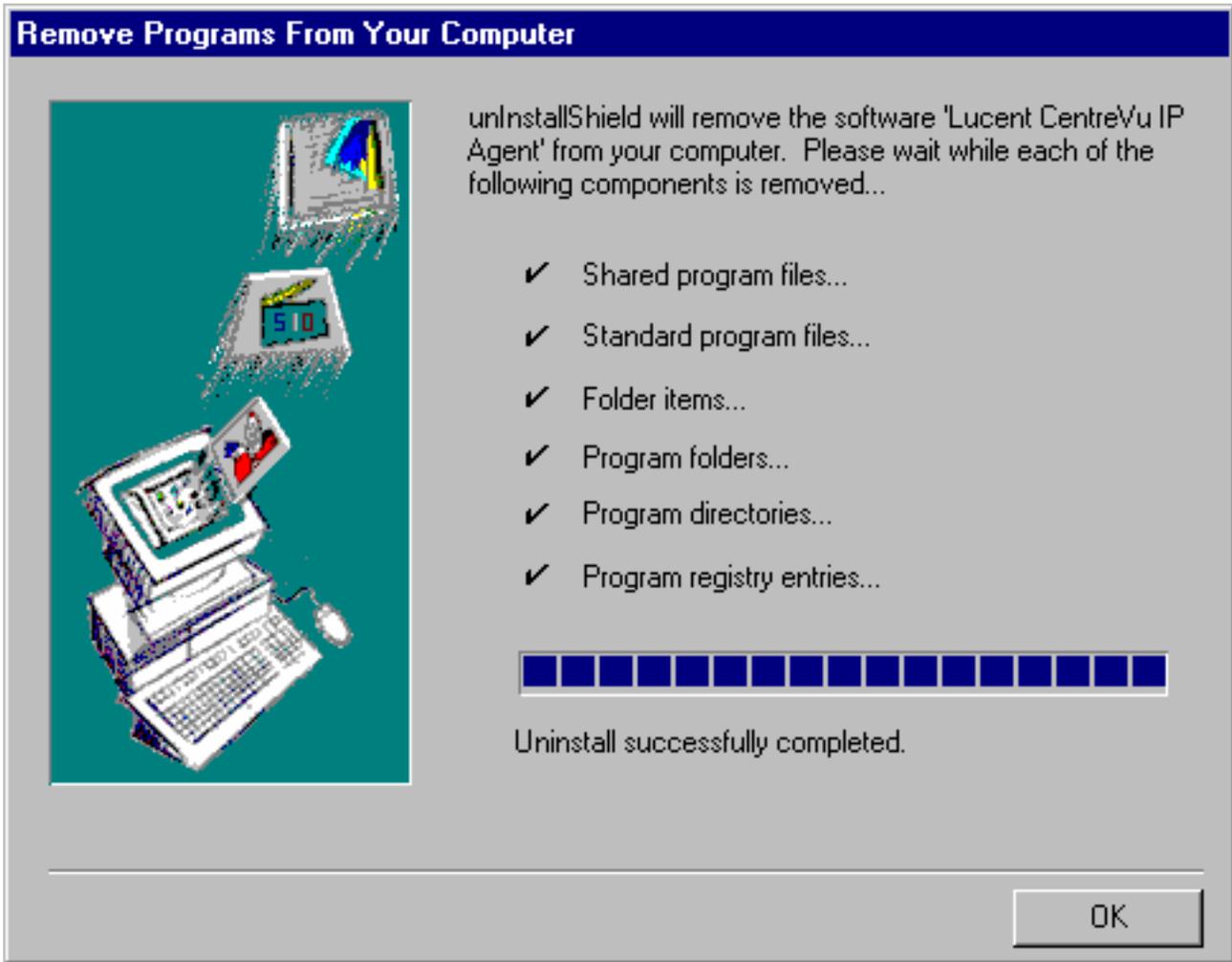
8 Select OK to close the IP Agent Uninstall application.

9 Restart your computer.

Important! You must restart your computer before you can reinstall IP Agent. Otherwise, you will get a message telling you to restart your computer.

E N D   O F   S T E P S

4 Running and Exiting IP Agent

Overview

Purpose   Before you can use IP Agent as a telephone, you need to first establish connectivity to your company's LAN (Local Area Network) where the *DEFINITY*® ECS resides. Then you need to register your extension with the *DEFINITY* ECS by completing the DEFINITY® Login window.

After you are registered with the *DEFINITY* ECS, you have an operating telephone and can now make, receive, conference, and transfer calls. However, in order to make yourself available for ACD calls, you need to perform an Agent login.

Running and Exiting IP Agent explains how to perform all of the above tasks, including:

- Starting IP Agent [4-2]
- Logging into the *DEFINITY* ECS [4-3]
- Logging into Agent Mode [4-8]
- Exiting IP Agent [4-11]

☐

Starting IP Agent

| **Procedure** | To run IP Agent, do the following: |

1   Log into your company's LAN.

2   Select Start from the taskbar.

3   Select Programs from the Start menu.
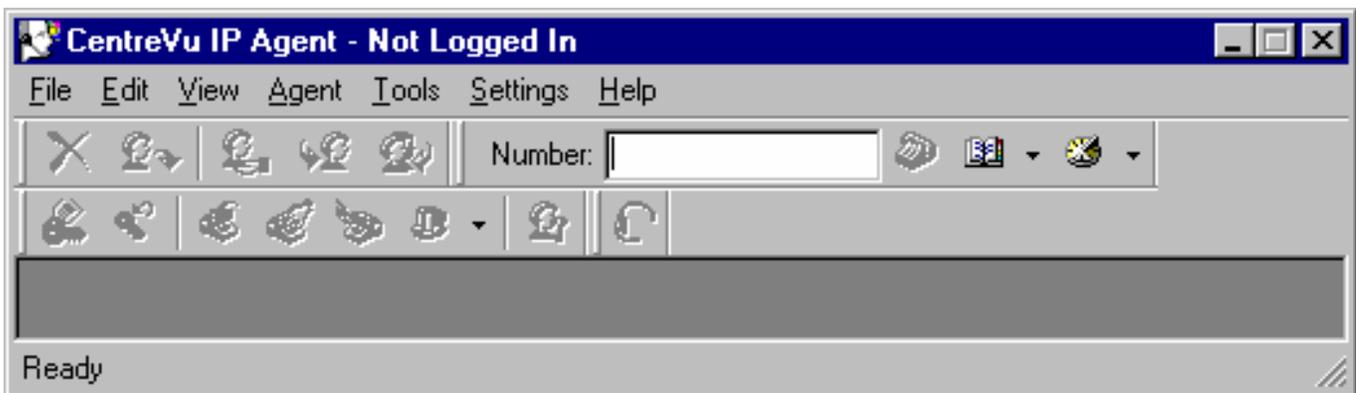
4   Select the Lucent CentreVu IP Agent program group.

5   Select CentreVu IP Agent in the language you prefer from the menu.

> **Result:**
>
> The CentreVu IP Agent and the DEFINITY Login windows appear. Although IP Agent is now running, you are not yet logged into the *DEFINITY* server.

6   Go to Logging into the *DEFINITY* ECS [4-3].

E N D   O F   S T E P S

Logging into the *DEFINITY* ECS

Introduction   Before you can use IP Agent, you need to log on to the *DEFINITY* ECS.

Procedure   To log into the *DEFINITY*ECS, follow these steps:

1   When you open IP Agent, the DEFINITY® Login window automatically opens. If the Login window does not open, select File and then select DEFINITY Login from the IP Agent window.

Result:

The DEFINITY® Login screen appears.

....

2 In the Extension box, enter the assigned extension that you will assume on the *DEFINITY* ECS.

....

3 In the Password box, enter your password.

....

4 To save your password for the next time you log into the *DEFINITY* ECS, enable the "Remember password for next login" check box.

....

....

5   In the Server area, do one of the following:

- Click the DEFINITY Node Name option button, and enter the domain name for the *DEFINITY* ECS.

- Click the IP address option button, and enter the IP address for the *DEFINITY* ECS.

....

6   In the "Telephone at" box, enter the phone number you will be using for talking and listening.

Important! You must enter the "Telephone at" phone number in the correct format for the *DEFINITY* ECS to dial it. This is the number that the server calls to reach you. Remember that the server may need to dial 9 to access your location.

....

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Result:

Here is an example of a completed DEFINITY® Login screen.

....

7   Click the Log In button. The Verify Telephone Number window appears.

Important! As suggested in this window, it is very important that you make some test calls before logging in as an agent, to verify that you have set up your connection properly.

....

8   Click OK to continue.

....

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Result:

The Login icon in the IP Agent main window is highlighted. This means that you have successfully logged into the *DEFINITY* ECS.
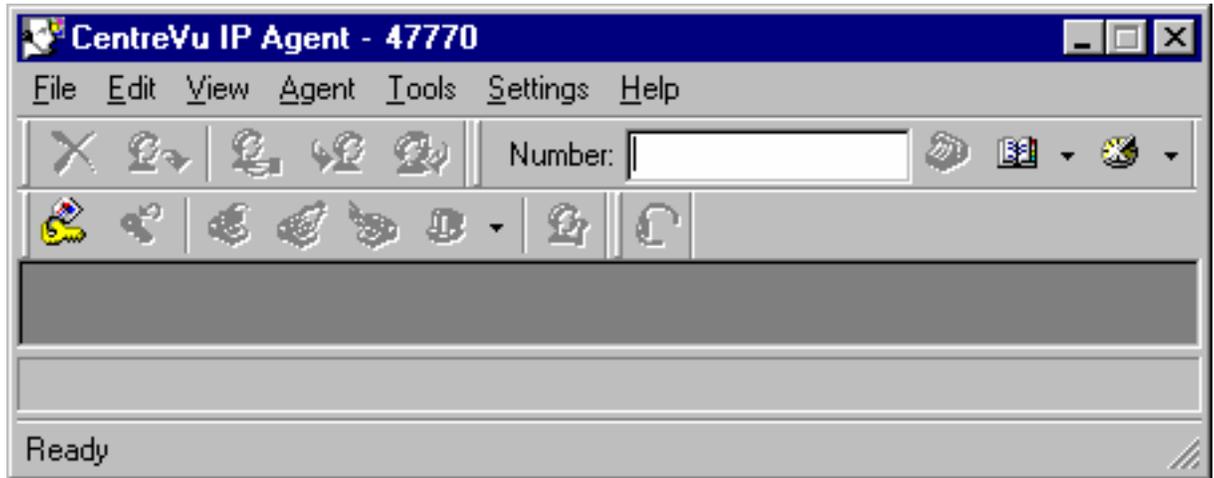
The "Not Logged In" phrase in the CentreVu IP Agent title bar has been replaced by your assigned extension and the DEFINITY® Login screen displays your login status.

....

9   Go to Logging into Agent Mode [4-8].

E ND O F S TEPS

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Logging into Agent Mode

Introduction   The *CentreVu*® IP Agent login is for EAS (Expert Agent Selection) agents only. If you are an EAS agent, you will need to log into agent mode in order to receive ACD (Automatic Call Distribution) calls. *Agent mode* means that you log into the skill set associated with your EAS agent number, which makes the Agent toolbar available for your use.

If you are a non-EAS agent, you will need to use the phone feature buttons instead of the Agent toolbar, or dial the desired FAC (Feature Access Code) as you would on a regular agent telephone set. (See Administering Options [7-5] for ways to efficiently handle your phone feature buttons, such as organizing and renaming them.) Ask your *DEFINITY* ECS administrator to configure your *DEFINITY* extension to include autodial buttons for each of your agent splits; for example, Agent Log In, Agent Log Out, and Auto-In mode.
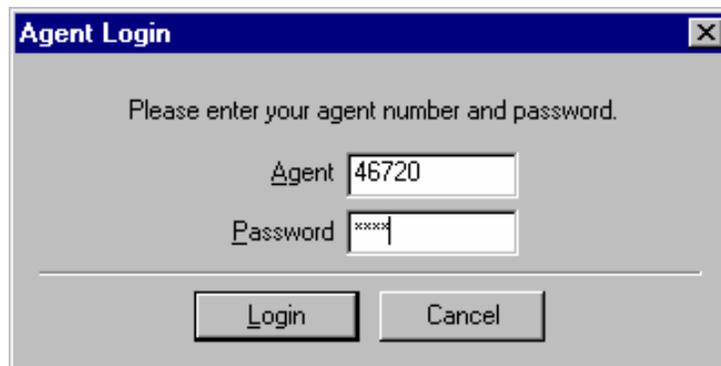
Procedure   To log into agent mode, use the following procedures:

1   In the CentreVu IP Agent window, click the EAS Agent Login button (highlighted).
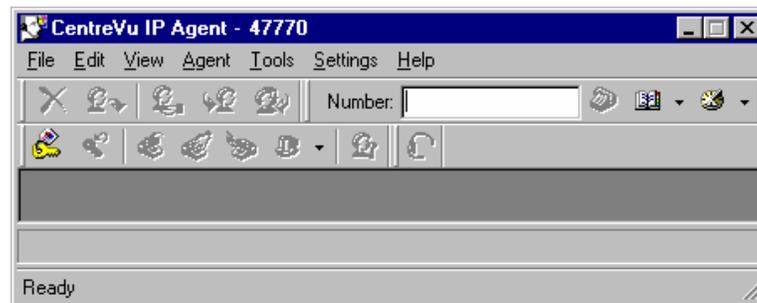
Result:

The Agent Login dialog box appears.

....

2   In the Agent Login dialog box, enter your Agent number and Password.

....

3   Click Login. As soon as you click Login, your voice phone rings.

Important! If you do not answer your phone immediately or if you entered the wrong number for the voice connection, the following message will appear: "Your call could not be completed. Please try again." You will have to click OK and log in again.

....

4   Depending on how your *DEFINITY* ECS is administered, you will be allowed to do either of the following:

- After you have answered the initial call, leave your phone off hook, and your phone line will stay open. This setting is called "permanent."

- After you have answered the initial call, hang up, leaving your phone on hook. This means that each time a call is received or made, your phone will ring. This setting is called "as needed."

....

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Result:

The buttons on the Agent toolbar are highlighted, and the title bar displays the Agent number. When you log in, you are automatically placed in AUX (Auxiliary) work mode.

....

5 To get out of AUX work mode, click either the Auto-In or Manual-In button.

For more information about Auto-In and Manual-In work modes, see Selecting Your Work Mode [5-2].

....

6 You are now ready to begin receiving and making calls.

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Exiting IP Agent

**Procedure**   This procedure tells you how to exit IP Agent and log out of *DEFINITY*.

1   If you logged into agent mode, you need to log out. To log out of agent mode, click the Logout button.

2   Depending on your *DEFINITY* ECS administration, you may be required to enter a reason code. See Using Reason Codes [6-19].

3   In the IP Agent menu bar, select the File menu and then select Exit.

4   Use your right-mouse button to click on the IP Agent icon on the right side of your *Windows*® task bar.

   Result:

   The *DEFINITY* log off options are displayed.
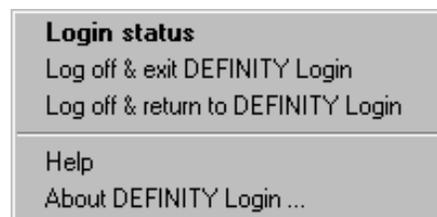
5   Select one of the following *DEFINITY* log off options:

- Log off & exit DEFINITY Login.

- Log off & return to DEFINITY Login.

E ND   OF   S TEPS

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5   Getting Started

Overview

Purpose   *Getting Started* is designed to quickly introduce you to IP Agent. In just a short time you will be familiar with the following:

- Handling Incoming Calls [5-2]
- Transferring a Call [5-7]
- Using Conferencing [5-12]
- Handling Outgoing Calls [5-18]
- Speeding-Up Outgoing Calls [5-21]
- Using the Phone Directory [5-25]
- Using the Call History Log [5-31]

Throughout this section, you are instructed to click buttons to perform commands or open dialog boxes (for example, "Click the Hold button on the Phone Button toolbar.") Most of these commands and dialog boxes can also be accessed by selecting the option in the CentreVu IP Agent menu bar. The options available on the IP Agent menu bar are discussed in detail in Learning the Main Window [6-2].

☐

Handling Incoming Calls

Introduction   *Handling Incoming Calls* describes those functions that you will be using every day when you receive an incoming call at your station, including answering a call, holding a call, releasing a call, and transferring a call. The following functions must be administered on the *DEFINITY*® ECS for your station in order to work. See Administering Options [7-5] for more information.

Selecting Your Work Mode   You can elect to set your incoming calls for Auto-In mode or Manual-In mode by selecting the mode in the Agent toolbar. If you are in Auto-In mode, when you complete a call, you are automatically available to receive another call, or you may be placed in After Call Work (ACW) mode for an administered length of time. When the timed ACW interval expires, you are automatically returned to the Auto-In mode. If you try to change agent modes while active on a call, the change is not made until you disconnect from the call.

If you are in Manual-In mode, when you complete a call, you are automatically placed in After Call Work (ACW) mode. In order to become available to receive another ACD call, you must manually enter the Auto-In or Manual-In mode. If you try to change agent modes while not active on a call, the change takes place immediately.

Answering a Call   Answering a call depends on how the *DEFINITY* ECS and network is administered. Each Call Center environment is different, which can affect the way you answer calls. It is suggested that each Call Center evaluate its configuration and instruct the agent on the best way to answer the IP Agent phone. There are too many possible IP Agent configurations for Lucent to support all of them. Below are suggested procedures on answering calls for two specific configurations.

Configuration 1

Agent administration for Auto Answer is set to station or none. Station Administration for Auto Answer is set to none. Station Administration has service link set to ″as-needed."

Each time a call is received, the analog phone set that provides the voice path will ring, as will the computer, depending upon the IP Agent option settings.

To answer a call for this configuration:

1. Wait for the analog phone to ring and answer it. Answering the analog phone will automatically answer the call on the IP Agent screen. If there is another call ringing on the screen, do not hang up the analog phone, click the answer button on the IP Agent screen and you are now connected to this call.

2. After the calling party disconnects from the call or you click release for that call, hang up the analog phone if no more calls are ringing on the IP Agent screen.

3. If there is another call ringing on the screen, do not hang up the analog phone. Click the answer button on the IP Agent screen and you are now connected to this call.

Configuration 2

Agent administration for Auto Answer is set to station, ACD, or all. Station Administration for Auto Answer is set to ACD or all. Station Administration has the service link set to ″permanent.''

During the event of Agent login, your analog phone will ring to deliver the login confirmation tone.

To answer a call for this configuration:

1. You should answer the phone and not hang it up for the remainder of your Agent shift.

2. If the phone accidentally gets cut off or hung up, the *DEFINITY* ECS will ring the analog phone when it has a call to deliver. You will then need to answer the analog phone.

3. As with any auto answer phone, the *DEFINITY* ECS will provide a zip tone (a beep) signaling that a new call has arrived .

Holding a Call   You can put a call on hold by using either the Auto Hold or Manual Hold feature.

1   To manually put a call on hold, click the Hold button on the Phone Button toolbar.

Result:

The button on your CIP changes to Reconnect.

....
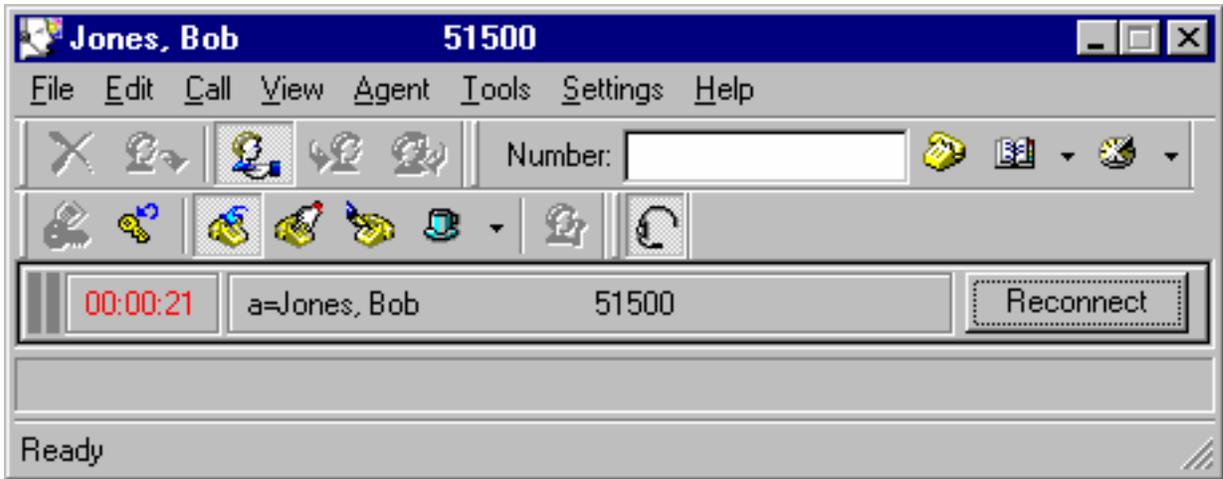
2   You can manually answer a second call while on an active call without having to put the first call on hold. The first call will automatically be put on hold when you answer the second call regardless of whether the Auto Hold or Manual Hold feature is administered for your station.

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Releasing a Call   There are three methods you can use to release a call. These methods will work only if the release feature has been administered for your station.
....

1   To release a call, do one of the following:

- While on an active call, click the Release button located on the CIP. You will not hear a dial tone after you press Release.

- Click the Release button located on the Phone Button toolbar.

- Press the space bar on your keyboard.

....

2   If you have a call on hold, you must first reconnect it before you can release the call.

Example:

In the example below, you would have to reconnect call 51500 before you could release it.
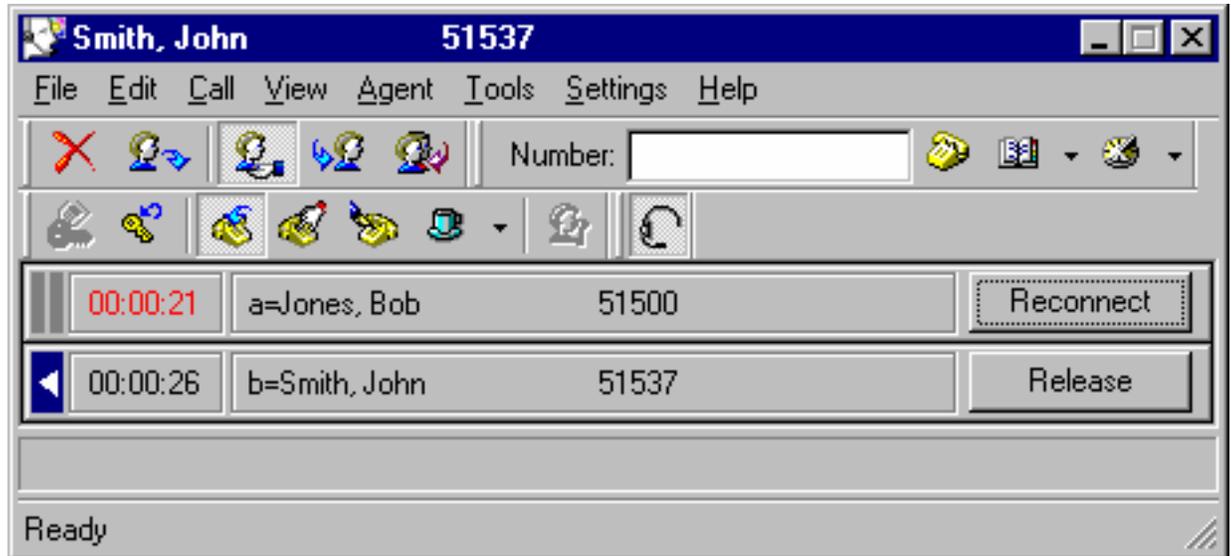
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Dropping a Call   Use the Drop feature when you want to disconnect from a normal call or drop the last party added to a conference call.

....

1   To drop a call, click the Drop button located on the Phone Button toolbar.

....

2   You are disconnected from the call and hear a dial tone.

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Transferring a Call

Introduction *Transferring a Call* describes the following three methods of transferring calls:

- Basic Transfer lets you send the present call to another extension or outside number. You select Transfer, dial the number, announce the call, and select Transfer again.

- Unsupervised Transfer differs from a Basic Transfer in that you select Transfer, type the number to be called into a text box, and click OK to transfer the call. You do not announce the call.

- Enhanced Transfer differs from a Basic Transfer in that you select Transfer, type the number to be called into a text box, and click OK. After announcing the call, you can either click Yes to transfer or No to not transfer the call.

Tip: The Transfer button can be configured for basic, unsupervised, or enhanced transfer in the Options dialog box. However, you can choose a type of transfer different than that configured by selecting the Call menu and then selecting Transfer.

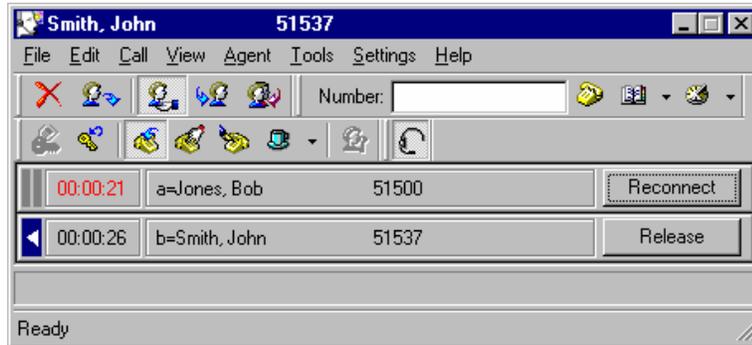For more information on the Options dialog box, see Administering Options [7-5].

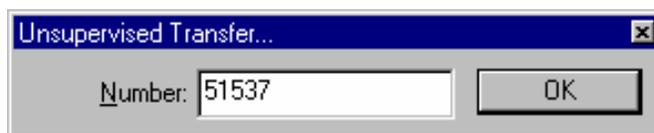**Basic Transfer** To transfer a call using Basic Transfer, follow these steps:

1 While you are active on a call, select Call from the menu bar. Then select Transfer and Basic Transfer.

Result:

The current call will automatically be put on hold and a new CIP will appear with dial tone.

2 Enter the number of the party you want to transfer the call to. The numbers are entered using the keyboard or Dial Pad.

3 When the second call is answered, you can privately talk to the party; then select Basic Transfer again to complete the transfer.

Tip: You may complete the transfer at anytime after the number is entered, during the ringing state, or after the second party answers.

Result:

Both CIPs disappear from your main callbar indicating that the transfer was successful.

4 You may change the call transfer into a conference by selecting Basic Conference instead of Basic Transfer in Step 3.

....

5   If there is no answer, the line is busy, or you decide the transfer is not
          needed, do the following to cancel the transfer:

- Click the Release button for the party that was going to receive
  the transfer. This will release that call.

- Return to the held call by selecting the call state Reconnect
  button for that held call.

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Unsupervised Transfer   To transfer a call using Unsupervised Transfer, follow these steps:
....

1   While you are active on a call, select Call from the menu bar. Then
          select Transfer and Unsupervised Transfer.

> **Result:**
>
> The Unsupervised Transfer box appears.

....

2   In the Unsupervised Transfer box, enter the number you want to
          transfer your existing call to, as in the example below. The number
          must be typed in, or it can be copied and pasted in.

....

3   Click OK to transfer the call. You do not have to click the Transfer
          button a second time to complete the transfer.

> **Result:**
>
> The CIP will disappear from your main callbar, indicating that
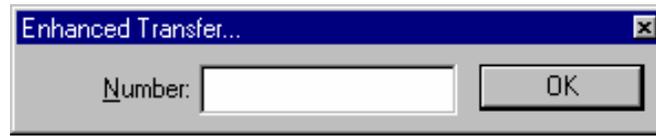> the transfer was successful.

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....

Enhanced Transfer   To transfer a call using Enhanced Transfer, follow these steps:

....
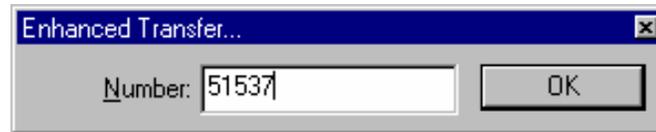
1   While you are active on a call, select Call from the menu bar. Then select Transfer and Enhanced Transfer.

Result:

The Enhanced Transfer box appears.

....

2   In the Enhanced Transfer box, enter the number you want to transfer your existing caller to, as in the example below:

Important! The number must be typed in, or it can be copied and pasted in.

....

3   Click OK. The caller will automatically be put on hold and a new CIP will appear with dial tone.

....

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Result:

The Transfer the Party? box appears.

4 Remain on the line. If the number dialed is answered, announce the call. Then click the Yes button in the Transfer the Party? box.

Result:

Both CIPs disappear from your main callbar indicating that the transfer was successful.

5 If the number dialed is not answered or is busy, click the No button in the "Transfer the Party?" box. Click the Reconnect button to return to the held call.

6 When finished, hang up or click the Drop button.

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Using Conferencing

....

Introduction *Using Conferencing* describes the following two methods of handling conference calls:

- Basic Conference lets you add another party to a call. You select Conference, dial the number, talk to the party to be added to the conference, and select Conference again.

- Enhanced Conference differs from a Basic Conference in that you select Conference, type the number of the party to be added into a text box, and click OK. After talking to the party, you can either click Yes to add or No to not add the party to the call.

Tip: The Conference button can be configured for basic or enhanced conference in the Options dialog box. However, you can override this configuration. Just select Call on the menu bar and then select the method of conferencing you prefer.

For more information on call conferencing, see Call Menu [6-4]. For more information on the Options dialog box, see Administering Options [7-5].

Basic Conference To conference a call using Basic Conference, follow these steps:
....

1 While you are active on the call to be conferenced, select Call from the menu bar. Then select Conference and Basic Conference.

Result:

The caller will automatically be put on hold and a new CIP will appear with dial tone.

....

....

2   Enter the number of the party you want to add to the call conference.
        The numbers are entered using the keyboard or the Dial Pad.

....

3   When the second call is answered, you can privately talk to the party;
        then select Basic Conference again to initiate the conference call.

        Tip: You may initiate the conference at any time after the number is
        entered, during the ringing state, or after the second party answers.

   Result:

   One CIP appears on your main callbar displaying
   ″CONFERENCE 2″ (indicating an active conference).

....

4   You may change the call conference into a transfer by selecting Basic
        Transfer instead of Basic Conference in Step 3.

....

5   Repeat Step 1 through Step 3 until you have conferenced all parties.

   Result:

   The single CIP will display ″CONFERENCE X,″ where X
   equals the number of parties you added to the call.

....

Example:

If you added three parties to the call, the display on the CIP will say ″CONFERENCE 3.″

6 If there is no answer, the line is busy, or you decide the conference is not needed, do the following:

- Click the Release button for the party that was going to be added to the conference. This will release that call.

- Return to the held call by selecting the call state Reconnect button for that held call.

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Enhanced Conference To add another person to a call, or conference a call, follow these steps:

1 While you are on an active call, select Call.

Result:

The Call menu appears.

2 From the Call menu, select Conference and then Enhanced Conference.

Result:

The Enhanced Conference Number box appears.

....

3   In the Enhanced Conference Number box, enter the number of the
party you want to add to the call.

Important! The number must be typed in, or it can be copied and
pasted in.

....

4   Click OK. The caller will automatically be put on hold and a new CIP
will appear with dial tone.

Result:

The "Add Party to call?" box appears.

....

5   Remain on the line. If the number dialed is answered, you can
privately talk to the party. Then click the Yes button in the "Add Party
to call?" box to add the party to the call.

Result:

One CIP appears on your main callbar displaying ″CONFERENCE 2″ (indicating an active conference).

---

6   If the number dialed is not answered or is busy, click the No button in the "Add Party to call?" box. Click the Reconnect button to return to the original party.

---

7   Repeat Step 1 through Step 6 until you have conferenced all parties.

Result:

The single CIP will display "CONFERENCE X," where X equals the number of parties you added to the call.

Example:

If you added three parties to the call, the display on the CIP will say "CONFERENCE 3."

8   Any person on the conference call can hang up at any time. The CIP will display ″CONFERENCE X,″ where X equals the number of parties left on the call.

9   To disconnect the last person added to the conference call, click the Drop button.

10   When the conference call is over, click the Release button.

Result:

The CIP will disappear from the main callbar.

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Handling Outgoing Calls

Introduction

There are two types of dialing, Senderized (S-channel) or Cut-through.

Senderized dialing means that when you enter a dial string in the Number text box, you must select the Dial Number button or Enter key to actually dial the number. This type of dialing lets you edit the dial string before sending it, which is handy for numbers that are long.

You can also use a Speed-Dial list or Recent Calls List to quickly select a number, or copy a number from a Personal Information Manager or other calling list and paste it into the Number box.

Cut through dialing works just like a standard phone. The numbers are sent as the keys are pressed. If you make a typing error, you must hang up and try again. You can use the Dial Pad or type numbers from the keyboard to enter the number.

Handling Outgoing Calls explains these two types of dialing.

Using Senderized Dialing

Follow the steps below to make a call using senderized dialing:

1   Place your cursor in the Number text box.

2   Enter the dial string from the keyboard. The numbers are not sent yet and can be edited if you make a typing error.

Important! In the English language version of IP Agent, you may intermix letters and numbers in the dial string. Letters will be translated to their number equivalent. Refer to the Dial Pad for the letter to number equivalent.

3   To send the number:

- Click the Dial Number button next to the Number box, or
- Press the Enter key. The Enter key works only if the main window is active.

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Result:

A new CIP will be displayed.

....

4   To make another call, repeat Step 1 through Step 3.

Result:

The call you were on (for example, ***Jones, Bob 51500***) will automatically be put on hold and the CIP button for that call will change to Reconnect.

....

5   A new CIP will be created with the dial string displayed (for example, ***Smith, John 51537***) and its CIP button will be Release.
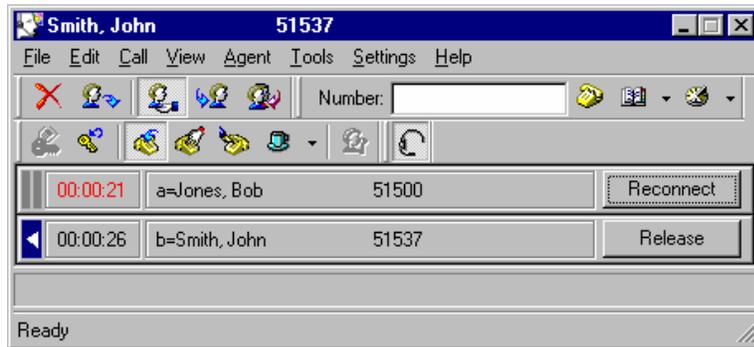
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....

Using Cut-Through Dialing   To make a call using cut-through dialing, use the following
procedures:

....

1   To obtain a dial tone:

- Click the Dial Number button next to the Number box, or

- Press the Enter key. The Enter key works only if the main
  window is active.

    Result:

    A new CIP will be displayed and you will hear a dial tone.

....

2   Enter the dial string using the keyboard or use the Dial Pad.
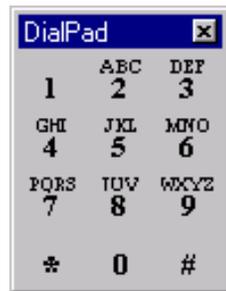
   Result:

   When you type a number, it is automatically sent and displays
   in the CIP.

....

3   If you type the wrong number, you must hang up and start over. No
editing is possible.

....

4   You can use the keyboard and Dial Pad alternately.

   Example:

   If you were dialing the number 51500, you could enter the 51
   using the keyboard and then enter the 500 using the Dial Pad.

....

5   When the last number is entered, the called phone will start ringing.

E N D   O F   S T E P S

□

Speeding-Up Outgoing Calls

Introduction There are several ways you can make the handling of outgoing calls more efficient. You can use a recent calls list, a speed dial number, or an abbreviated dial button.

Using a Recent Calls List You can quickly dial or redial recent incoming or outgoing calls by using a recent calls list. Phone numbers are not duplicated in the list, so if the last ten calls are to the same number, the number will only be displayed in the list once. Calls are only added to the list if they contain a valid phone number.

Some points to know about the recent calls list are:

- You or your system administrator can control the number of recent call numbers displayed by setting the number in the Options dialog box. See Administering Options [7-5] for more information.

- The list may show the last 25 unique numbers recorded in the Call History log. Numbers from other sources (abbreviated dial buttons or numbers dialed on active calls (pin numbers) are not included in the list.

- Letters dialed (for example, 1800FLOWERS) will appear in the recent calls list as entered, and not as the number translation.

Procedure To make a call using the Recent Calls list:

1 Click the down arrow next to the Call History button.

Result:

A list of previously dialed or previously received numbers appears.

CALL FROM	303-555-5505
Jones, Bob	51500
Smith, John	51537
Jim Woods (Business)	

2 Click the number you want to dial.

Result:

The CIP will look like the following example:

....

3 The phone number is sent and the called phone will start ringing.

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....

Administering Speed Dialing

IP Agent lets you determine speed dial numbers in the Phone Directory Properties dialog box. A speed dial number can be any number in the Phone Directory, up to a maximum of 25 numbers. To use speed dialing, follow these steps:

....

1 In the IP Agent main window, click the Phone Directory button.

Result:

The Phone Directory dialog box appears. Here is an example of a Phone Directory with button callouts.

....
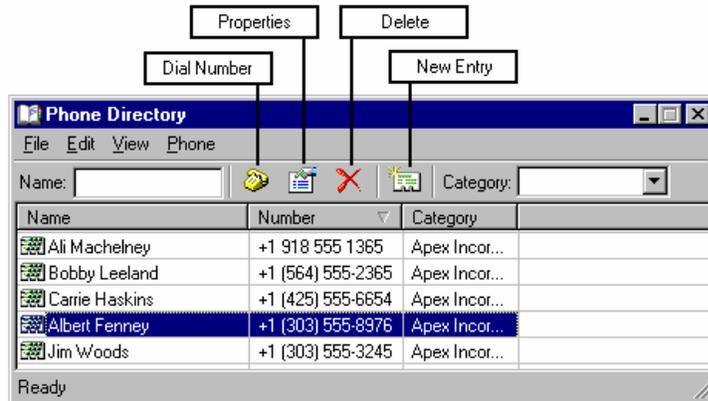
2   In the Phone Directory menu, do one of the following:

- If you are creating an entry, click the New Entry button.
- If you are editing an entry, highlight the entry. Select View and then select Properties.

   Result:

   The Properties dialog box appears.
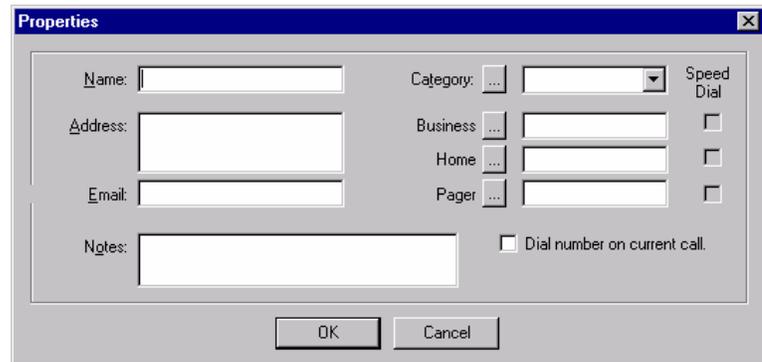
3   Enter or edit the appropriate information in the Properties dialog box fields.

Important! For more information on the Phone Directory and Phone Directory Properties dialog boxes, see Using the Phone Directory [5-25].

4   Check the Speed Dial button next to the phone number that you want to administer as a speed dial number.

5   Click OK.

6   To use a speed dial number, in the IP Agent main window, click the down arrow next to the Phone Directory button.

Result:

The speed dial list appears.

---
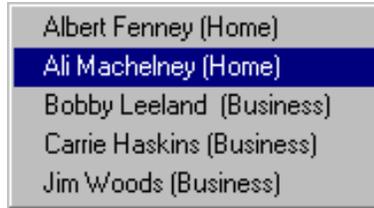
7   Click the number you want to dial.

---

8   The phone number is sent and the called phone will start ringing.

E N D   O F   S T E P S

Using an Abbreviated Dial Button   If the Abbreviated Dial feature has been administered on the *DEFINITY* ECS for your physical station terminal, you can store selected telephone numbers in the Phone Features dialog box for quicker and easier dialing. Each number can be a complete or partial telephone number, an extension number, or a trunk or feature code. To make a call using an Abbreviated Dial button, follow these steps:

---

1   In the Phone Features dialog box, click the Abbreviated Dial button containing the number you want to dial.

   Result:

   The digits of the phone number will appear in the display area of the CIP.

   Tip: The button label for an abbreviated dial is a number (for example, 51008); and the button label for an auto dial button is autodial plus the number (for example, autodial 51008).

---

2   The phone number is sent and the called phone will start ringing.

E N D   O F   S T E P S

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Using the Phone Directory

....

Introduction   You can store names, addresses, email addresses, notes, and phone numbers in the Phone Directory. The directory will support multiple numbers for each entry.

The directory entries can be displayed with the following views: large icons, small icons, list, and detailed. In the detailed view, the entry's name, number, email, category, and notes are listed. The number displayed in this view is the first number found for the entry if multiple numbers are entered. The directory entries can be sorted by name, number, or category.

Procedures   To use the Phone Directory, follow these procedures:

....

1   In the IP Agent main window, click the Phone Directory button.

   Result:

   The Phone Directory dialog box (detailed view) appears.

....
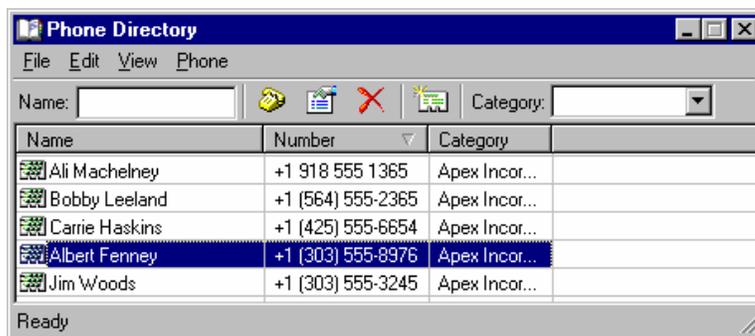
2   To call a number from the Phone Directory, click the name in the directory list.

....

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Result:

If the name in the directory entry has more than one number, a popup menu with a list of numbers appears.

....
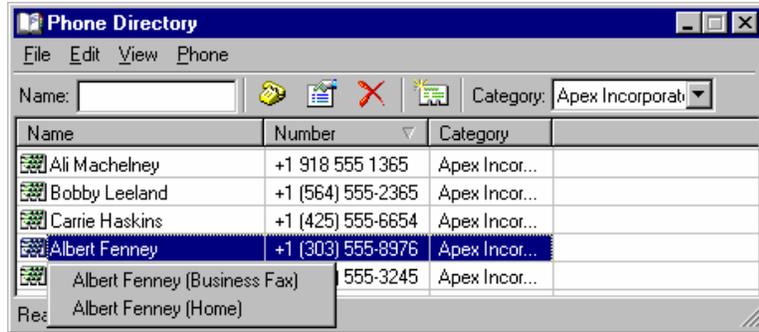
3 Select the appropriate number from the popup menu.

....

4 Click the Dial Number button in the Phone Directory to dial the number.

....

5 If you want to create an entry in the Phone Directory or edit an entry, you need to use the Properties dialog box. See Adding to the Phone Directory [5-26] or Editing the Phone Directory [5-28].

....

6 To remove an entry from the Phone Directory, highlight the entry and click the Delete button.

Result:

The entry is deleted from the Phone Directory.

E N D   O F   S T E P S
....

Adding to the Phone Directory

The Phone Directory Properties dialog box enables you to add a new entry to the phone directory. You can add or edit directory entries using the Properties dialog box. To display the Properties dialog box, follow the steps below.

....

1 While in the Phone Directory dialog box, click the New Entry button.

....

Result:

The Properties dialog box appears.

---
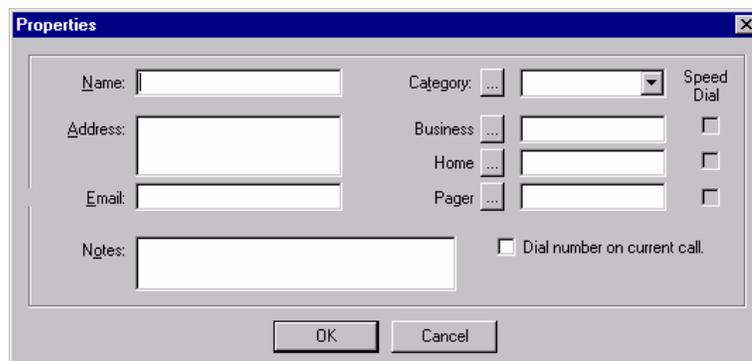
2   Enter the customer's name in the Name field. The Name value is used by the program when displaying this entry in the Call Information Panel or Call History log.

---

3   Complete the Properties dialog box fields, as appropriate. Use the tab key to move from field to field.

---

4   In the Address field, enter the customer's address. Press Ctrl +Enter to move the cursor from one line to another.

---

5   In the Email field, enter the customer's email address.

---

6   Enter any notes you might have in the Notes field.

---

7   In the Category, click the down arrow to see a list of categories and select the category the customer belongs to.

Tip: See Editing Categories [5-29] for information on changing or adding a category.

---

8   Enter the customer's phone number or numbers in the phone number type fields—Business, Home, or Pager.

Tip: See Changing Phone Number Type Labels [5-29] for information on how to change the labels on these fields.

....

9   If you want to add a phone number to your speed dial list, click the speed dial button.

....

10   When finished using the Properties dialog box, click OK to exit.

Result:

The Phone Directory dialog box displays the additions or changes you made.

E ND OF S TEPS
....

Editing the Phone Directory

The Phone Directory Properties dialog box enables you to edit directory entries.

....

1   To edit a directory entry, click the entry in the Phone Directory dialog box.

....

2   To display the Properties dialog box, click the Properties button.

Result:

The Properties dialog box appears.

....

3   Make the appropriate edits to the fields in the Properties dialog box.

....

4 When finished making edits, click the OK button.

> **Result:**

> The changes will appear in the Phone Directory dialog box.

E ND OF S TEPS

Editing Categories

You can add, rename, or remove a category in the Phone Directory Properties dialog box by selecting the Edit Categories option.

To edit a category, follow these steps:

1. Click the "..." button next to the Category label. The Edit Categories dialog box appears.

2. Click Add to create a new category.

3. Highlight a category and click Remove to remove it. You can administer up to 10 categories.

4. When finished editing categories, click Close. You are returned to the Properties dialog box.

Changing Phone Number Type Labels

The Phone Directory supports multiple phone numbers for each entry. The following phone number types are supported: Business, Business Fax, Home, Home Fax, Mobile, Car, Assistant, Company, and Pager. The phone number labels in the Phone Directory Properties dialog box are initialized to Business, Home, and Pager. However, you can change these labels to any of the above phone number types.

To change the phone number type labels, follow these steps:

1. In the Phone Directory Properties dialog box, click the "..." button next to the phone number type label.

2. A popup menu appears containing the remaining phone number type labels that are not displayed. A check mark next to a label means that the label is already administered.

```
Business Fax
Home Fax
Mobile
Assistant
Car
Company
```

3. From the popup menu, click the label you want on the button. The label is changed on the button.

☐

Using the Call History Log

Introduction	The Call History log stores information on incoming and outgoing calls by automatically generating a call record, or one-line summary of each call. You can add or modify notes in the record, delete the call record, or dial the selected number from the record.
	Important! This topic contains easy-to-follow procedures on how to use the Call History feature. For detailed information on the Call History log, see Viewing Call History [6-21].
Procedures	To use the Call History log, follow these procedures:

1   On the IP Agent menu bar, click the Call History button.

> **Result:**
>
> The Call History log appears. Here is an example of a Call History log with button callouts:
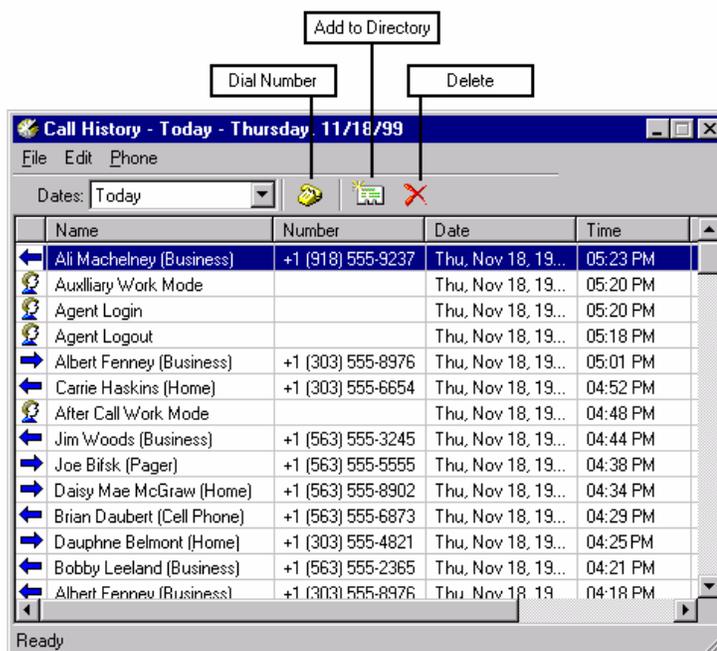
2   To call a number from the Call History log, click the record containing the phone number you want to dial.

....

3 To dial the number, click the Dial Number button. You may also call a number by simply double-clicking the icon preceding the call record.

....

4 To edit a record in the Call History log, highlight the record and select Edit from the menu bar.

Tip: You can edit the Name, Number, and Notes fields.

....

5 To add a record from the Call History log to the Phone Directory, highlight the record and then click the Add to Directory button.

>   **Result:**

>   The entry is added to the Phone Directory.

....

6 To delete a record from the Call History log, highlight the record and click the Delete button.

>   **Result:**

>   The entry is deleted from the Call History log.

E ND OF S TEPS

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6   Using IP Agent

Overview

Purpose   *Using IP Agent* describes the menus and panels in the IP Agent main window. It also explains how to use IP Agent features, such as reason codes and the call history log.

Using IP Agent covers the following topics:

- Learning the Main Window [6-2]
- Displaying Toolbars and Dial Pad [6-11]
- Viewing Panels and Status Bar [6-13]
- Using Phone Feature Options [6-15]
- Using Reason Codes [6-19]
- Viewing Call History [6-21]
- Searching the Public Directory [6-23]

For information on starting IP Agent, logging into the *DEFINITY*® ECS, and logging into IP Agent, see Chapter 5, Getting Started.

□

Learning the Main Window

Introduction   The IP Agent main window provides full-function, multi-line telephony support on your PC. A representation of the Main Window with callouts of all of its components is available in IP Agent Main Window [1-2].

Learning the Main Window defines all of the options available in the IP Agent menus. Not all of the items will be available to you all of the time. If an item is not available in the current window, it is grayed out.

File Menu   Select File to open the File menu, as shown below:
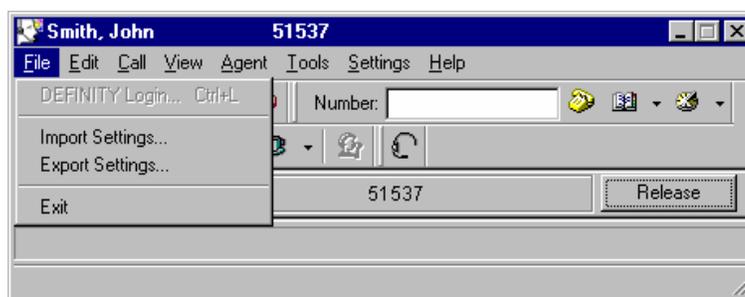
The following table lists the File menu commands and a description of each command.

Menu Item	Description
DEFINITY Login (Ctrl+L)	Displays the DEFINITY Login window. If you are already logged in, this item is grayed out.
Import Settings	Displays an Open dialog box for finding retrieving previously saved files containing phone settings, program options, and configurations.
Export Settings	Displays a Save As dialog box for naming a file that will contain phone settings, program options, and configurations for later use.

Menu Item	Description
	The options imported and exported include all the options displayed on the Options dialog box except the "Voice Message Directory Entry" option. The configuration information includes all administered call events along with the DDE or Web Page triggers. It also includes Public Directory administration and the *DEFINITY* server name or IP address. Select Options from the Tools menu to review the Options choices.
Exit	Quit the application.

Edit Menu   Select Edit to open the Edit menu, as shown below:

The following table lists the Edit menu commands and a description of each command.

Menu Item	Description
Cut (Ctrl+X)	Cuts any text selection, such as names or numbers, in the number text box.
Copy (Ctrl+C)	Copies any text selection, such as names or numbers, in the number text box.
Paste (Ctrl+V)	Pastes any text selection, such as names or numbers, in the number text box.

Call Menu   Select Call to open the Call menu, as shown below:
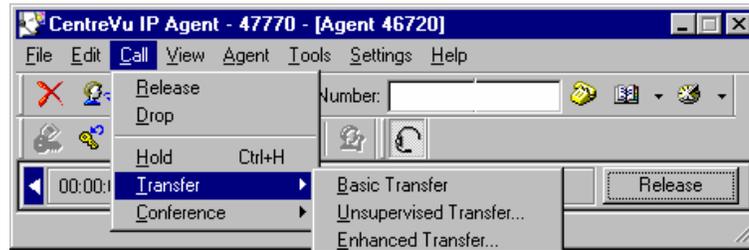
The following table lists the Call menu commands and a description of each command.

Menu Command	Submenu Command and Buttons	Description
Release (Del)		Releases the call.
Drop		Disconnects from a call without requiring you to hang up the handset, turn off the speakerphone, or press the switchhook. Used mainly to disconnect the last party added to a conference call.
Hold (Ctrl+H)		Puts a call on hold until you can return to it. While the call is on hold, you can place another call, activate another feature, answer a waiting call, or leave your voice terminal. Use when you have a call that you don't wish to drop, but which you have to interrupt briefly to do something else.
Transfer (Ctrl+T)		Sends a call from your voice terminal to another extension or outside number. Use when your caller needs to speak further with someone else.
	Basic Transfer	Select Transfer, dial the number, announce the call, and select Transfer again.

Menu Command	Submenu Command and Buttons	Description
	Unsuper-vised Transfer	Select Transfer, type the number to be called into a text box, and click OK to transfer the call. You do not talk to the party receiving the transferred call.
	Enhanced Transfer	Select Transfer, type the number to be called into a text box, and click OK. After announcing the call, you can either click Yes to transfer or No to not transfer the call.
Conference		Allows you to add parties to a call. Use to set up time-saving conferences, or to spontaneously include a party important to a discussion.
	Basic Conference	Select Conference, dial the number, talk to the party, and select Conference again.
	Enhanced Conference	Select Conference, type the number to be called into a text box, and click OK. After talking to the party, you can either click Yes to add the party or No to not add the party to the call.

View Menu   Select View to open the View menu, as shown below:
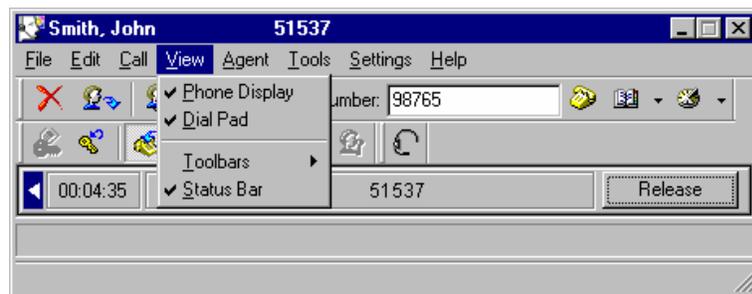
The following table lists the View menu commands and a description of each command. For more information on toolbars, see Displaying

Menu Command	Submenu Command and Buttons	Description
Phone Display		Displays the Phone Display panel, which displays information such as VuStats data or call prompting digits.
Dial Pad		Displays the Dial Pad, which may be used to enter numbers for cut-through dialing. See "Using Cut-Through Dialing."
Toolbars	Phone Button	Displays the Phone Button toolbar, which contains those buttons most often used.
	Dial Number	Displays the Dial Number toolbar, which provides a senderized dial box and access to various lists. This toolbar contains the Dial Number button.
	Agent	Displays the Agent toolbar, which provides buttons for EAS agent login and logout and agent modes.
Headset		Displays the Headset button, which you can use to toggle the headset or handset on or off hook. This is used for Auto-Answer stations or agents, as administered by your switch.
Status Bar		Shows or hides the status bar, which displays the current activity or state of IP Agent and ToolTips.

....

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Agent Menu   Select Agent to open the Agent menu, as shown below:
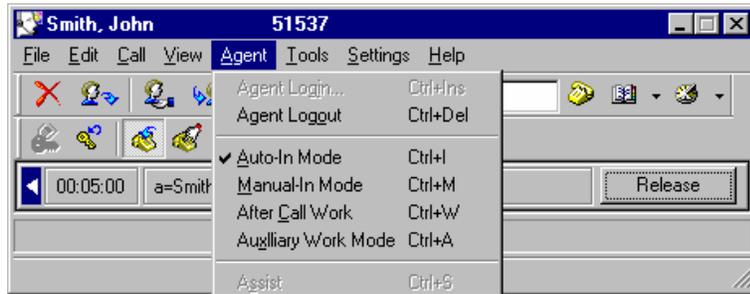
The following table lists the Agent menu commands and a description of each command.

Menu Command	Buttons	Description
Agent Login (Ctrl+Ins)		Displays the Agent Login dialog box, which enables you to enter your EAS Agent login ID number and Password to log into agent mode and the skills associated with that mode on the switch.
Agent Logout (Ctrl-Del)		Enables you to log out of agent mode and the skills associated with that mode on the switch.
Auto-In Mode (Ctrl+I)		An Automatic Call Distribution (ACD) work mode. In the Auto-In mode, when you disconnect from a call you are automatically available to receive another ACD call.
Manual-In Mode (Ctrl+M)		An ACD work mode that makes you available to receive an ACD call and automatically places you into the ACW state upon release from the call.
After Call Work (ACW) (Ctrl+W)		An ACD work mode that allows time to wrap up call-related work before the next ACD call is delivered.

Menu Command	Buttons	Description
Auxiliary Work Mode (AUX) (Ctrl+A)		An ACD work mode indicating that you are unavailable to receive an ACD call . You may have to enter a reason code to go into the AUX work mode, depending on the administration of your switch.
Assist (Ctrl+S)		Allows you to request assistance from the skill supervisor by pressing the Assist button. If you have a call up and click the Assist button, the request will go to the split supervisor assigned.

Tools Menu Select Tools to open the Tools menu, as shown below:

The following table lists the Tools menu commands and a description of each command.

Menu Command	Buttons	Description
Phone Features		Opens the Phone Features dialog box, which lists all feature buttons administered on the switch for this phone.
Personal Features		Opens the Personal Features dialog box, which consists of a list made up selected feature buttons from the Phone Features dialog box.

Menu Command	Buttons	Description
Phone Directory		Opens the Phone Directory, which stores names, addresses, phone numbers, and other information.
Call History		Opens the Call History log, which contains call history information including calling party name, calling party number, date, time, duration, and call notes.
Screen Pops		Opens the Screen Pop administration dialog box.
Search Public Directory		Provides access to corporate or public directory services, thereby letting you query and manage a database, such as a directory, over a TCP/IP connection.
Options		Opens the Options dialog, which allows you to administer various options, such as whether to display IP Agent on top of other windows, what type of font to use for call display information, whether to display tooltips for toolbars, and so forth.

Settings Menu   Select Settings to open the Settings menu, as shown below:

The following table lists the Settings menu command and a description of each command.

Menu Command	Description
Dialing Properties	Opens the *Windows*® Dialing Properties dialog box. When you dial a number from IP Agent, the number will be formatted based on the information configured on the computer in the Dialing Properties dialog.

Help Menu   Select Help to open the Help menu, as shown below:

The following table lists the Help menu commands and a description of each command.

Menu Command	Description
Contents	Selecting Contents opens the IP Agent on-line help table of contents.
About CentreVu IP Agent	Gives information on IP Agent, including the copyright date and the version number.

Displaying Toolbars and Dial Pad

Introduction   The following toolbars are associated with the IP Agent main window—Phone Button, Dial Number, Agent, and Headset. These toolbars contain buttons that you can use for quick access to specific commands and tools. Based on your user permissions, some or all of the buttons will appear on the toolbars when you are logged into agent mode. You can move the toolbars to the top or bottom of the window or display each in its own separate window. To do this, click on the left-most portion of the desired tool bar and drag to a new position. Repeat the step to return the toolbar to the main panel.

The Dial Pad is also discussed here.

To see examples of the toolbars with callouts of the names of each button, see IP Agent Main Window, Toolbars [1-4].

Phone Button Toolbar

The Phone Button toolbar provides quick access to the basic phone buttons: Release, Drop, Hold, Transfer, and Conference.

An example of the Phone Button toolbar is shown below:

Dial Number Toolbar

The Dial Number toolbar provides a Number text box and access to the Phone Directory, Call History log, speed dial list, and recent calls list. When you enter a partial string in the Number text box (for example, 303 or Jo) followed by enter, a popup menu displays with a list of the directory entries that start with that string (for example, 303–555–5555, 303–555–5550, Johnson, John, or Joanne). If the first character of the number is a letter, the title of the field will be changed from Number to Directory.

The Dial Number toolbar looks similar to this:

Agent Toolbar

The Agent toolbar provides buttons for EAS agent login and logout and agent modes (Auto-In, Manual-In, After Call Work, AUX work mode, and supervisor Assist).

Here is an example of the Agent toolbar:

Headset Toolbar

The Headset toolbar displays a button you can use to toggle the headset or handset on or off hook.

The Headset toolbar looks like this:
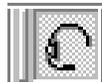
Dial Pad

The Dial Pad displays the numbers that are on a telephone dial pad. It contains 12 push-button that you use to dial a number and access features.

The Dial Pad looks like this:

Viewing Panels and Status Bar

Introduction The IP Agent main window contains a panel at the bottom of the window that serves as both a Call Information Panel (CIP) and an Agent Information panel. You can also display another panel, the Phone Display Panel, by selecting View and then selecting Phone Display.

To display the status bar, select View and then select Status Bar.

Call Information Panel

The CIP appears only during an incoming and outgoing call. It provides information about the call, such as call status, call display, call duration, and control buttons (for example, Answer/Release and Reconnect). If the number associated with the call display is in the Phone Directory, the call display will contain the display name in the directory and not the display information from the switch.

The call status—incoming, outgoing, or on-hold—is displayed in the first section. Click the right mouse button on the CIP to display a popup menu containing feature buttons, such as hold, transfer, and conference.

An example of the Call Information Panel is shown below:
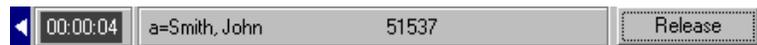
Agent Information Panel

The Agent Information panel appears when there are no calls and there is status information. If you are logged in, the status information also includes the agent mode state (for example, Auto-In and Manual In).

An example of the Agent Information panel is shown below:

Phone Display Panel

The Phone Display panel is a 40-character display that is located under the CIP. This display area is updated automatically with information from the *DEFINITY* ECS so that you can see call and non-call related information, such as call prompting digits, VuStats data, and the local time/date display from the switch.

Here is an example of the Phone Display panel:

```
a=Info: 1111222233334444
```

Status Bar

The status bar is located at the bottom of the IP Agent main window and displays IP Agent application status. It also displays a brief description of each of the toolbar buttons when the mouse pointer is over the button. If you have activated ″Send All Calls,″ the default string will be changed from ″Ready″ to ″Ready - Send All Calls Activated.″

```
Ready
```

☐

Using Phone Feature Options

Introduction   The Phone Features dialog box displays in a tree view all feature buttons administered on the switch for this physical station terminal, which may include reason codes. The features are divided into the following groups: Abbreviated Dial, Call Center Features, Miscellaneous Features, and Stroke Count.

You can select any feature button to add to your Personal Phone Features dialog box to create a personalized summary of your most used buttons.

Phone Features   To access the Phone Features dialog box to set phone features, follow these steps:

1   In the IP Agent menu bar, select Tools and then select Phone Features.

Result:

The Phone Features dialog box appears.

---
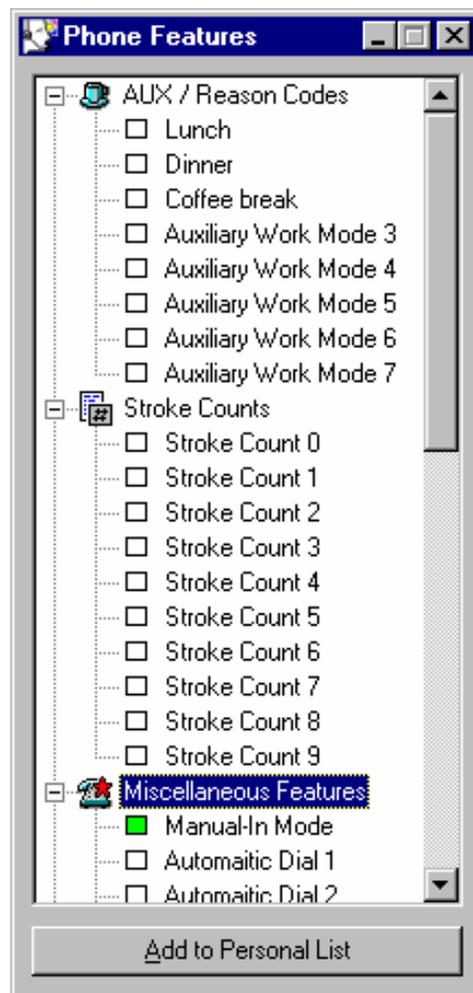
2   When a phone feature button is activated in IP Agent, the icon next to the button is green. To activate a button, double-click on the icon.

---

3   To copy your most frequently used phone feature buttons to your Personal Phone Features dialog box, highlight the feature and select Add to Personal List.

....

4   To rename or change the button labels in the Phone Features dialog box, right-click on the button and select Rename from the pop-up menu. Then type the new name in the button box.

For example, You could replace an "Abbreviated Dial" digit string with a label such as "Marriott."

Important! If the button you are renaming is also in your Personal Features dialog box, the name will be changed there as well.

....

5   Depending on your privileges, you may delete a button from the Phone Features dialog box by selecting it and clicking the Delete key or clicking the right-mouse button and selecting Delete.

....

6   To restore the button label back to its original switch administered label, highlight the button, right-click, and select Restore.

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....

Personal Features   To access the Personal Features dialog box, follow these steps:
....

1   In the IP Agent menu bar, select Tools and then select Personal Features.

> **Result:**

> The Personal Features dialog box appears.

....
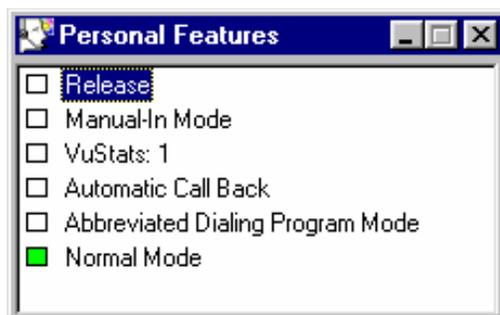
2   To activate or deactive a feature, double-click on the icon or string.

....

3 To delete a button from the Phone Features dialog box, select it and press the Delete key, or click the right-mouse button and select Delete.

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Using Reason Codes

Introduction   There are two different types of reason codes—AUX (Auxiliary) reason codes and Logout reason codes. Reason codes enable a call center to track your time more precisely, which is then reported in real-time and historical reports.

AUX Reason Codes   You use an AUX reason code to specify why you are in the AUX state (for example, lunch, break, or meeting). Here are some points to keep in mind when using AUX reason codes.

- AUX reason codes are single digits, 0 through 9.

- You can rename or view AUX reason code names in the Phone Features dialog box.

- AUX Reason Code 0 is used for cases when the switch automatically puts you into AUX.

- The *DEFINITY* EAS feature is required to use the AUX reason codes feature.

How AUX Reason Codes are Administered

The first station administered AUX reason code will be assigned to the Auxiliary Work Mode (AUX) button on the Agent toolbar.

If multiple AUX reason codes are administered on the station, they will appear in the Phone Features dialog box under the "AUX Reason Codes" category and on the menu associated with the AUX button.

If your Agent toolbar contains an AUX button that was administered without a reason code, you will be prompted to enter a reason code. This prompt will appear on the Phone display panel. Type the number associated with your reason for going into AUX work mode.

Logout Reason Codes   You use a logout reason code to explain why you are logging out (for example, end of a shift or training). Here are some points to keep in mind when using logout reason codes:

- Logout reason codes are single digits, 0 through 9.

- Logout Reason Code 0 is used when the system logs you out, or if you do not specify a code.

- The *DEFINITY* EAS feature is required to use the logout reason codes feature.

Depending on your *DEFINITY* EAS administration, you may be required to enter a logout reason code before you can log out of agent mode. In the Number text box, type the number associated with your reason for logging out.

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Viewing Call History

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Introduction   The Call History log displays information about incoming and outgoing calls. The information stored includes the name of the person, the number dialed or the number received, date, time, and duration of the call. It also includes agent login and agent state modes, such as auto-in, agent login, agent logout, and after call work. The log contains a menu bar, toolbar, status bar, and a call history record.

For more information about the Call History log, including adding Call History numbers to the Phone Directory, see Using the Call History Log [5-31].

The symbols on the Call History dialog box are as follows:

Incoming call:

....

Outgoing call:

Missed call:

Agent status:

The Call History log contains the following fields:

- Name field: Contains the name of the calling party, followed by the number type (for example, business, home, or fax). For agent mode records, the Name field contains the agent mode state, such as Agent Login or Manual-In.

- Number field: Contains the phone number dialed for outgoing calls. For incoming calls, the number displayed depends on the features provided by the switch. If the switch provides caller identification information, that number will be displayed.

- Date and Time fields: Contain the date and time the call originated.

- Duration field: Displays the length of the call.

- Notes field: Contains optional information entered by the user. This field supports 255 characters.

☐

Searching the Public Directory

Introduction   The Search Public Directory feature provides access to corporate or public directory services. It lets you query and manage a database, such as a directory, over a TCP/IP connection.

Important! This feature is also called *Search LDAP (Lightweight Directory Access Protocol).*

Procedures   To search the Public Directory, follow these procedures.

1   Access the Search feature by doing one of the following:

- In the IP Agent menu bar, select Tools and then select Search Public Directory, or

- In the Phone Directory menu, select File and then select Search Public Directory.

For more information on the Phone Directory, see Using the Phone Directory [5-25].

   Result:

   The Search Public Directory dialog box appears.
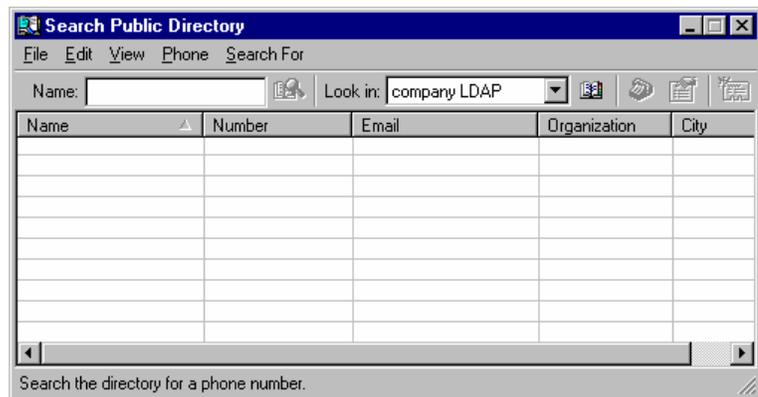
2   Select Search For on the menu bar to display the type of data to look for: Name, Phone Number, or Email Address.

Result:

The type of data you select appears as the label for the first text box; for example, if you select Phone Number, the label changes from Name to Number.

....

3   In the first text box enter the Name, Number, or Email (depending on the label) of the person you want to search for.

....

4   Click the down arrow next to the "Look in" field to select the directory in which to search.

Important! For information on adding or editing directories, see Setting Up and Editing Directories [6-25].

....

5   Open the File menu and select Search.

Result:

The search displays the entries in the detailed view, which lists the entry's name, number, email, organization, and city.

....

....
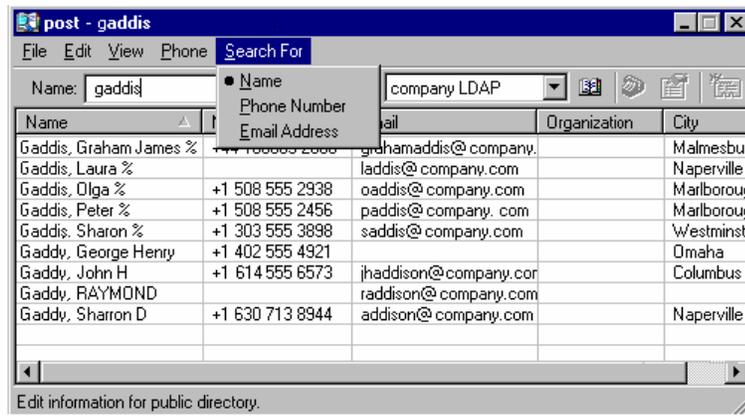
6   Once the entry is found, you can select it to call. You can also copy and save an entry from the Public Directory into the IP Agent Phone Directory.

Important! When an entry is added to the phone directory, the name, phone and email fields are automatically entered.

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Setting Up and Editing Directories

To search a public directory, you must perform the appropriate directory administration. Follow these steps:

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1   To begin the directory administration, in the Search Public Directory dialog box do one of the following:

- Click the Directory button, or

- Select Accounts from the Edit menu.
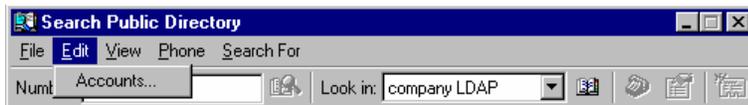
Result:

The Directory Setup dialog box appears.

....

....
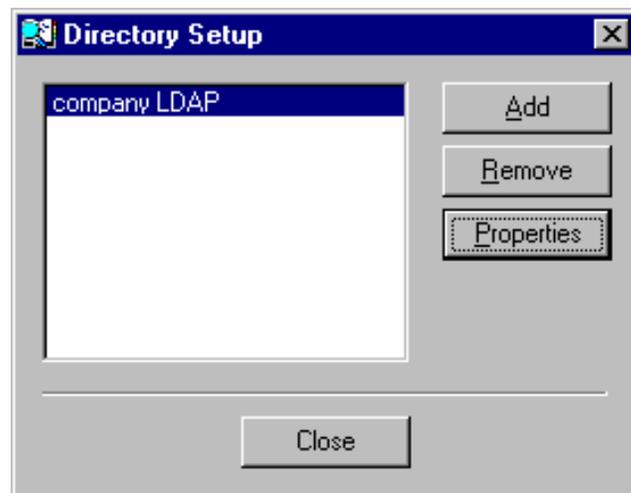
2 In the Directory Setup dialog box, do one of the following:

- Click the Add button to add a directory to be set up.

- Highlight a directory and click the Remove button to remove a directory.

- Click Properties to add or edit directory information.

    Result:

    The Directory Properties dialog box appears.

....
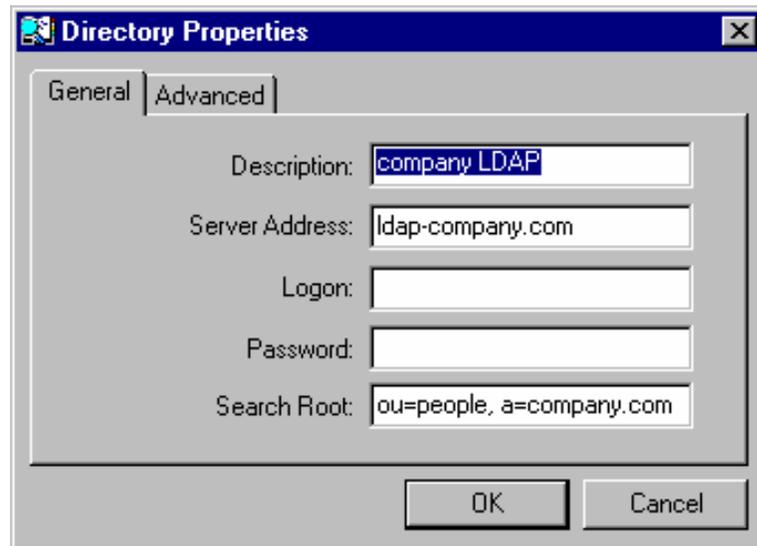
3 In the General tab, enter or edit the following information about the specified directory:

- Description

- Server (Public) address

- Search Root

Important! Logon and Password requirements are dependent on the database you are accessing.

....

....

4   Click the Advanced tab.

....
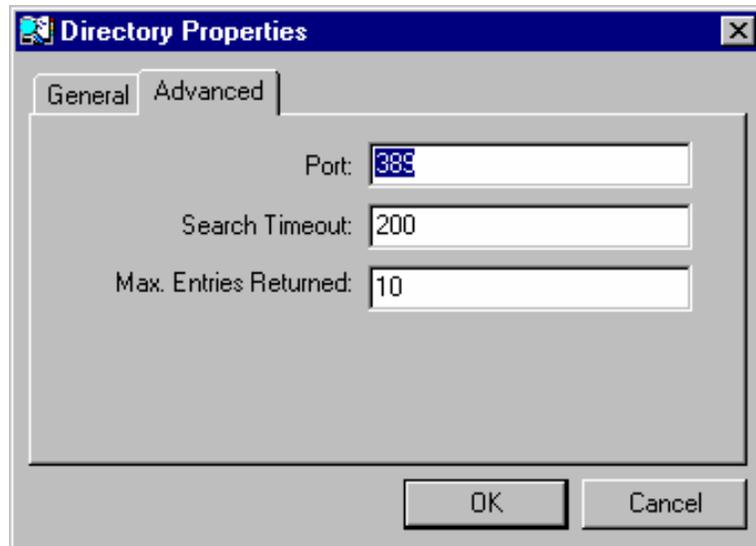
5   In the Advanced tab, enter or edit the following:

- Port

- Search Time-out

- Maximum Entries Returned for the Public Directory

Important! These settings are determined by the administrators of the database you are accessing.

....

6   When finished making your entries, click OK to exit the Directory Properties dialog box and return to the Search Public Directory window.

Result:

The directory you added has now been added to the directory list in the Search Public Directory dialog box. You can now select this directory from the "Look in" list box.

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7 Performing Administrative Tasks

Overview

Purpose   *Performing Administrative Tasks* is written for supervisors and system administrators who are responsible for setting up and maintaining computer configurations and options that affect the operation of the IP Agent software.

Performing Administrative Tasks includes the following topics:

- Administering Dialing Properties [7-2]
- Administering Options [7-5]
- Administering Screen Pops [7-11]
- Administering ACD [7-22]

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Administering Dialing Properties

Introduction *Administering Dialing Properties* explains when and how numbers are formatted and dialed.

To administer dialing properties, do the following:

1. On the *Windows*® taskbar, select Start on the taskbar and then click Settings and Control Panel. The Control Panel appears.

2. In the Control Panel dialog box, select Telephony. The Dialing Properties window appears.

3. In the Dialing Properties window (see example below), enter the information asked for in the fields. Refer to *Microsoft*® *Windows* Help for information on what to enter in the Dialing Properties window.
    Tip: Remember that these are the dialing properties for the switch you are connected to, not your home phone.
    These are the minimum fields that you need to fill in:

    *   Country/region area code (Some countries will need to set area code rules.)

    *   For local calls, dial

- For long distance calls, dial (usually the same number as the local access number.)
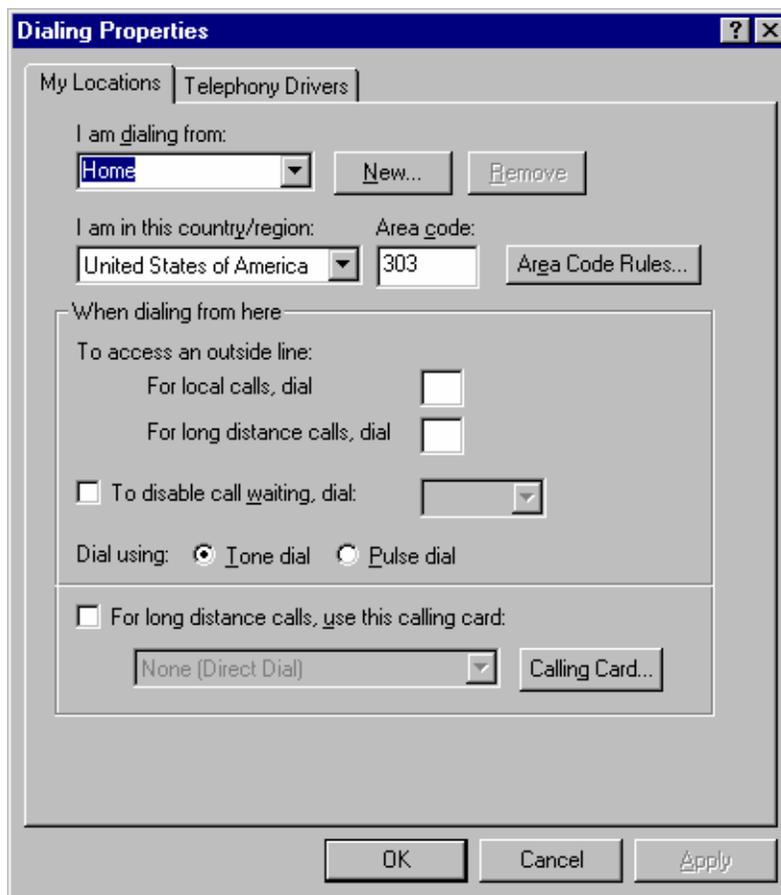
When you dial a number from IP Agent, the number will be formatted based on the information configured on the computer in the Dialing Properties dialog.

For example, if your configuration is as follows:

- Area Code: 303.
- To access an outside line for local calls, dial 9.
- To access an outside line for long-distance call, dial 9.

The following table shows how numbers are formatted and dialed:

User Enters	Formatted Number	Number Dialed
5551212	+1 (303) 555-1212	9 555-1212
85571	85571	85571
8005551212	+1 (800) 555-1212	9 1 800 555-1212
61295551212	+6 (129) 555-1212	9 011 6 129 555-1212
800flowers	+1 (800) FLOWERS	9 1 800 356-9377
95551212	95551212	95551212
918005551212	918005551212	918005551212

Administering Options

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Scenario   The supervisor or system administrator is responsible for administering the options on all remote computers. To do this, the supervisor first sets up the options on a computer the way he or she would like to have the options administered on all remote computers. Next, he or she administers the necessary screen pops and sets up the actions for each screen pop.

After setting up all the options, the supervisor exports the configuration information to a disk and distributes it to each remote agent, along with the IP Agent compact disk, or he or she exports the configuration information to a shared network directory. After the agent installs IP Agent on his home computer, he can import the configuration information from the appropriate location. The IP Agent's computer will then contain the options and configuration that the supervisor wanted.

The options exported and imported will include all the options displayed on the Options dialog box except the "Voice Message Directory Entry″ option. The configuration information will include all administered call events along with the DDE or Web Page triggers. It will also include Public Directory administration and the *DEFINITY*® ECS name or IP address.

The supervisor can elect to disable the program administration so that the agents cannot change the program administration on their computers.

Administrable Options

The Options dialog lets you administer the following options:

- Always display IP Agent on top of other windows?
- Display an "Answer" icon in the system tray when the phone is ringing?
- Display call display information using ″Eurofont″ font?
- Display call display information using ″Kanafont″ font?
- Display call display information with this font size?
- Display the main window when the phone is ringing?
- Display tooltips for toolbars?
- Enable TAPI assisted dialing?
- Flash the window's title bar when the phone is ringing?

....

- Log incoming calls.

- Log outgoing calls.

- Number of days to keep calls in the call log?

- Number of digits in company extensions?

- Number of recent calls that will be displayed by "Recent Call" popup menu?

- Phone directory entry for voice messages?

- Play alerting sound using the computer's internal speaker?

- Play alerting sound using the computer's sound card?

- Prompt for Agent ID and Password during Agent Login?

Setting Options   To administer options, follow these steps:

1   From the IP Agent menu bar, open the Tools menu and select Options.

Result:

The Options dialog box appears.

....
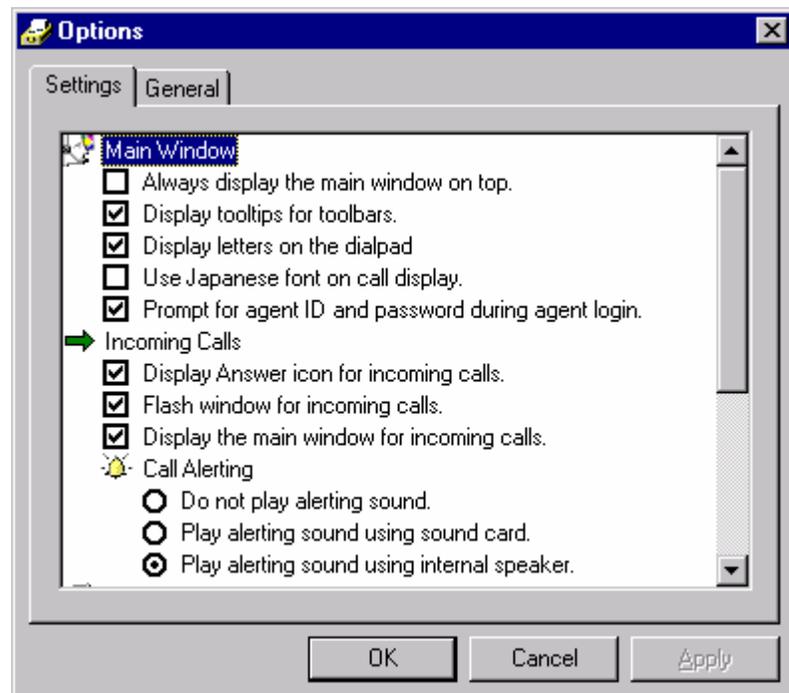
2   In the Settings tab, click on an option to enable or disable it.

....

3   If you want to clear all call history entries, you can do it by clicking the Clear History button.

....

4   To make Call History and other general changes, select General.

Result:

The General tab appears.

....
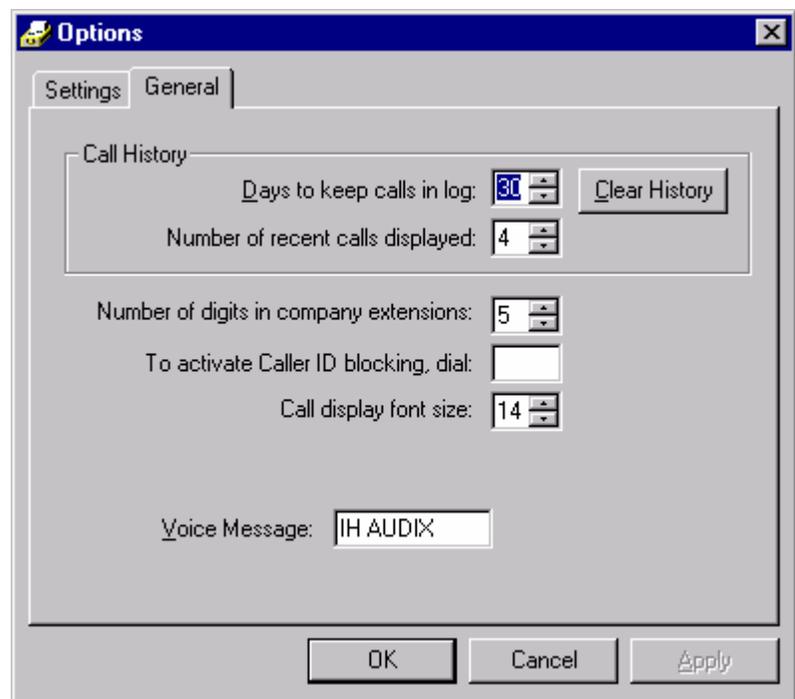
5   In the General tab, enter the appropriate changes.

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6   When finished, click OK to activate the options.
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Exporting the Settings To export these settings to a disk or shared network directory, follow these steps:

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1 From the IP Agent menu bar, open the File menu and select Export Settings.

> **Result:**
>
> The Save As dialog box appears.

....
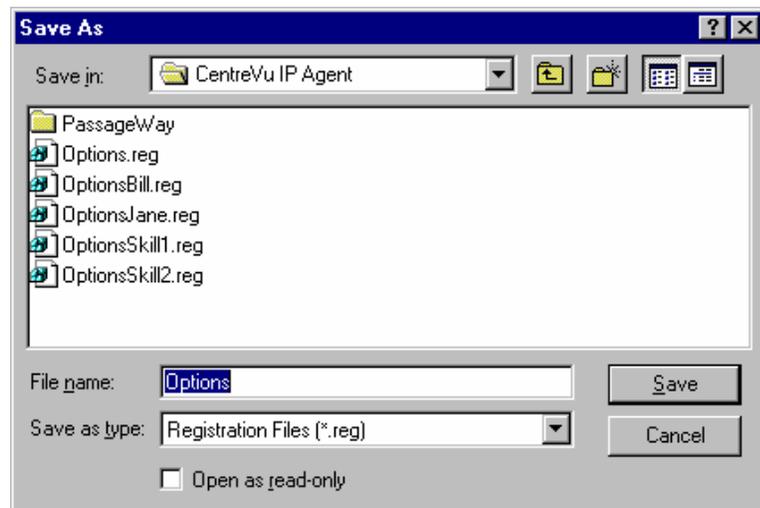
2 In the Save As dialog box, enter the following fields (or accept the defaults):

- Save in—navigate to the drive and folder where you want to save the file.

- File name—enter the name of the file.

- Save as type—select the type of file.

....

3 Click "Open as read-only" if you do not want the agents updating the file.

....

4 Select Save to save the file to the destination folder you specified.

....

Result:

The agent can now import the configuration information from the appropriate location.

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Importing the Settings   The agent can now import the configuration information from a disk or shared network directory to his or her computer. To do so, follow these steps:

....

1   From the IP Agent menu bar, open the File menu and select Import Settings.

Result:

The Open dialog box appears.

....
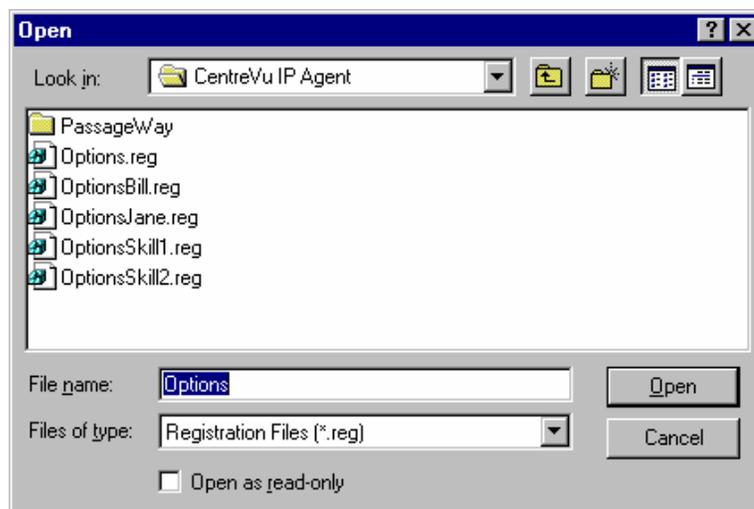
2   In the Open dialog box, select the file you want to import.

....

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Result:

If all goes well, the program informs you that the configuration information has been successfully entered into the registry.

Registry Editor	✕
ⓘ Information in C:\Program Files\Lucent\CentreVu IP Agent\Options.reg has been successfully entered into the registry.	
OK	

....
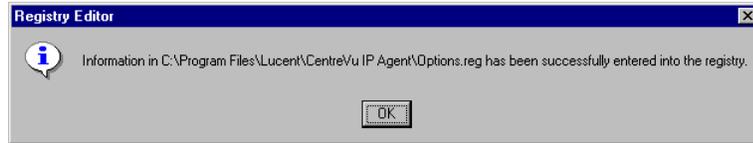
3   Click OK or press the Enter key.

Result:

The options your supervisor has set up for your station have been successfully imported.

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Administering Screen Pops

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Introduction Screen pops are used to trigger application actions. Screen pops can trigger either a Dynamic Data Exchange (DDE) or an HTML event.

To see a detailed view of call events, select the View command in the Screen Pops dialog box. The detailed view displays the entry's description, call type, call source, event trigger, and trigger description. You can add, edit, or delete a screen pop.

DDE Screen Pops You can administer information about calls that will generate DDE screen pops in the Screen Pops dialog box. To administer DDE screen pops, do the following:

1. In the IP Agent main menu, select Tools and then select Screen Pops. The Screen Pops dialog box appears.

2. From the Screen Pops menu bar, select the item you want to use; for example, "Incoming Ringing."

3. To add properties, click the New button. Then go to DDE Properties [7-12].

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The following table lists the Screen Pops menu commands and a description of each command.

Menu Command	Submenu Command and Buttons	Description
File	New	Displays an empty Properties window.
	Close	Closes the Screen Pops window.
Edit	Delete	Deletes the highlighted entry in the Screen Pops window.
View	Properties	Displays the Properties window for the line item selected in the Screen Pops window.

DDE Properties   The Properties dialog box lets you add or edit properties that will be used to initiate a screen pop.

1.   To add properties, select the New button in the Screen Pops dialog box. The Properties dialog box appears.

2.   Complete the fields in the Properties dialog box. See the table below for descriptions of the fields.

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3. Click Setup to add, edit or remove DDE triggers. Then go to DDE Screen Pops Setup [7-14].

The following table gives a description of all of the fields in the Properties dialog box.

Field	Action
Description	Enter several words that describe this trigger event.
Call Type	Activate this event for incoming or outgoing call.
Call State	Indicate the state of the call. To do so, enter one of the following: • Ringing (incoming) • Answered (incoming) • Released (incoming and outgoing) • Call Missed (incoming) • Connected (outgoing)
Trigger this action	Activate to trigger. Do one of the following: • Activate a DDE event. • Activate an HTML event.
Unnamed list box	Presents a list of DDE Trigger Setups or presents a list of HTML Trigger Setups, depending on which is selected.
Setup Button	

Field	Action
DDE selected	Displays the DDE Screen Pops Setup screen.
HTML selected	Displays the HTML Screen Pops Setup screen.
OK button	Makes the data in the Properties screen active and returns you to the Screen Pops window.
Cancel Button	Ignores the data in the Properties screen and returns you to the Screen Pops window.

DDE Screen Pops Setup

The Screen Pops Setup dialog box lets you add, edit or remove DDE triggers.

1. Click Setup in the Properties box to display the Screen Pops Setup dialog box.

2. Select Properties or Add to display the DDE Screen Pop Properties dialog box. Then go to DDE Screen Pops Properties [7-15].
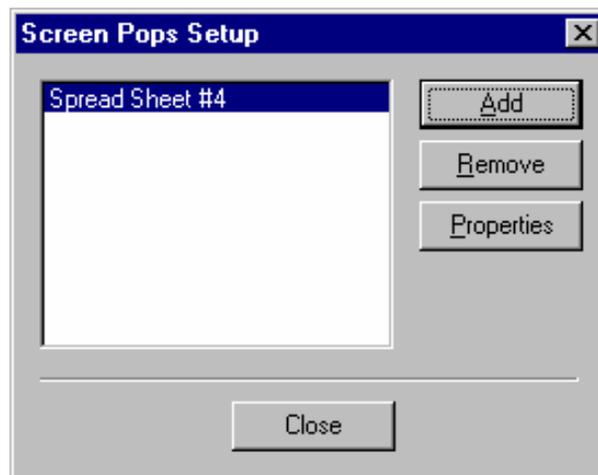
This table gives a description of the buttons on the Screen Pops Setup dialog box.

Button	Description
Add	Displays a blank Screen Pop Properties screen.
Remove	Removes an entry if it is highlighted.

Button	*Description*
Properties	Displays the Screen Pop Properties screen with the properties of the Trigger description selected.
Close	Returns you to the first Properties screen and ignores any changes made in the Screen Pops Setup.

DDE Screen Pops Properties

The DDE Screen Pop Properties dialog lets you describe the trigger, indicate an application, enter a command, or enter other information that would help to trigger a DDE event.

1. You clicked the Properties button in the Screen Pops Setup dialog box to display the DDE Screen Pop Properties screen.

2. Complete the fields in the DDE Screen Pop Properties dialog box. See the table below for descriptions of the fields.

3. To test the connection to the DDE server, press the Test button. After the connection is established, you can execute commands or poke data. The Status window will display DDE status information while you are testing the trigger.

In the DDE Screen Pop Properties dialog box, enter any of the following:

Field	Description
Description	Short description of the trigger.
Service	A string expression identifying an application that can participate in a DDE conversation. Usually, the application argument is the name of an .exe file (without the .exe extension) for a *Windows*-based application, such as *Microsoft* Access.
Topic	A string expression that is the name of a topic recognized by the application argument. This will be the second parameter of the DDEInitiate() function.
Test	To test the connection to the DDE server, press the Test button. The Status window will display DDE status information while you are testing the trigger.
DDE Function	IP Agent can send information using the ″execute″ or the ″poke″ command.
Command	A string expression specifying a command recognized by the server application. This field is only used for the ″Execute″ DDE command. The string will only be changed to input caller information. The syntax must match the syntax required by the DDE program. For example, if embedded quotes must be quoted (e.g. ″name = ″″Lang″″″), then the string must be entered that way.
Item	A string expression that's the name of a data item recognized by the topic specified by the DDEInitiate function. This field is only used for the ″Poke″ DDE command.
Data	A string containing the data to be supplied to the other application. This field is only used for the ″Poke″ DDE command.
Data Format	The format string of the database.
Number Length	Number length of the data.
Status	Status of the data.

To have caller information inserted in the command or data fields, enter the appropriate data format:

- Party number - %D

- Party name - %N

- Call prompting digits (incoming calls only) - %P

HTML Screen Pops   You can administer information about calls that will generate HTML screen pops in the Screen Pops dialog box. To administer HTML screen pops, do the following:

1. In the IP Agent main menu, select Tools and then select Screen Pops. The Screen Pops dialog box appears.

2. From the Screen Pops menu bar, select the item you want to use; for example, Outgoing Connected.

3. To add properties, click the New button. Then go to HTML Properties [7-18].

This table lists the Screen Pops menu commands and a description of each command.

Menu Command	Submenu Command and Buttons	Description
File	New	Displays an empty Properties window.
	Close	Closes the Screen Pops window.
Edit	Delete	Deletes the highlighted entry in the Screen Pops window.
View	Properties	Displays the Properties window for the line item selected in the Screen Pops window.

HTML Properties   The Screen Pops Properties dialog box lets you add or edit properties that will be used to initiate a screen pop.

1. To add properties, select the New button in the Screen Pops dialog box. The Properties dialog box appears.

2. Complete the fields in the Properties dialog box. For information on these fields, see DDE Screen Pops Properties [7-15].

3.   Click Setup to add, edit or remove HTML triggers. Then go to HTML Screen Pops Setup [7-19].
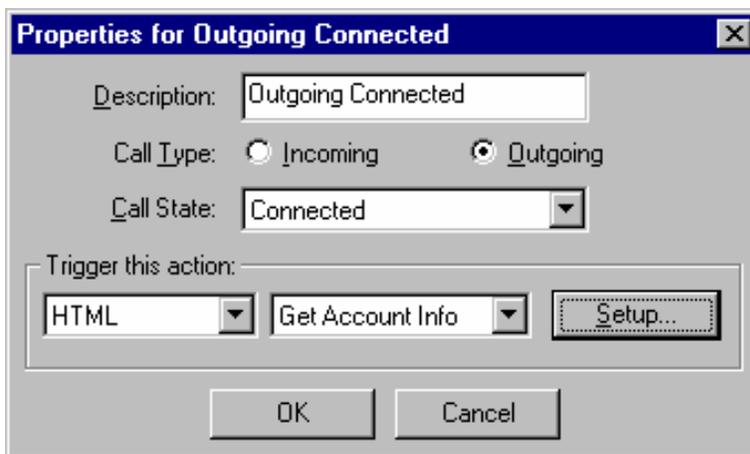
HTML Screen Pops Setup   The Screen Pops Setup dialog box lets you add, edit or remove HTML triggers.

1.   Click Setup in the Properties box to display the Screen Pops Setup dialog box.

2.   Select Properties or Add to display the HTML Screen Pop Properties dialog box. Then go to HTML Screen Pop Properties [7-20].
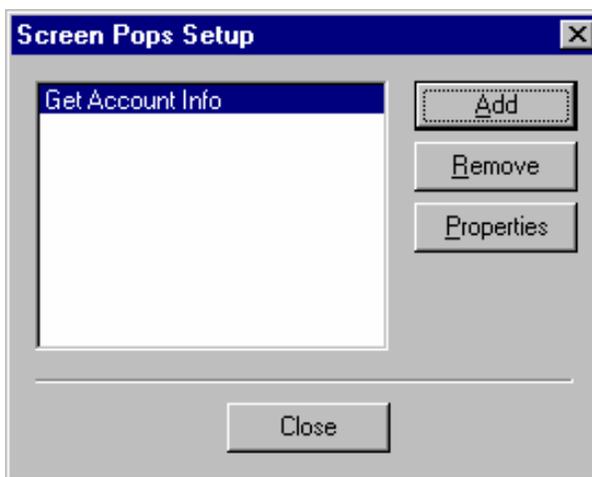
This table contains a list of HTML setup descriptions and four buttons.

Button	*Description*
Add	Displays a blank HTML Screen Pop Properties screen.
Remove	Removes an entry if it is highlighted
Properties	Displays the HTML Screen Pop Properties screen with the properties of the Trigger description selected.
Close	Returns you to the first Properties screen and ignores any changes made in the HTML Trigger Setup.

HTML Screen Pop Properties

The HTML Screen Pop Properties dialog lets you describe the trigger, indicate an application, enter a command, or enter other information that would help to trigger an HTML event.

1. You clicked the Properties button in the Screen Pops Setup dialog box to display the HTML Screen Pop Properties screen.

2. Complete the fields in the HTML Screen Pop Properties dialog box. See the table below for descriptions of the fields.

3. After the connection is established, you can pass caller information to the HTML trigger by including the appropriate data format string in the command, data, or URL field.

In the HTML Screen Pop Properties dialog box, enter any of the following:

Field	*Description*
Description	A short description of the trigger.
URL	The URL string of the Web page.
Test	To test the connection to the HTML server, press the Test button. The Status window will display HTML status information while you are testing the trigger.
Data	The format string of the database.
Number Length	The number length of the data.

Administering ACD

Introduction   *Administering ACD* explains how to set up Automatic Call Distribution (ACD) for IP Agent. See Supported Phone Sets [1-5] for a list of phone sets that Lucent Technologies supports for use with IP Agent.

For IP Agent to work properly, you will need as a minimum the following buttons: Release, Auto-In or Manual-In, and an AUX Work with a null Reason Code button. AUX buttons are displayed in the order they are administered on the switch. The first administered AUX button will be used if you click the AUX button or use the shortcut key, Control-A.

For more information on button layout for *CALLMASTER*® VI, see the *CentreVu*® *Version 1.0 Installation and Administration guide* (585–215–816).

Doing the Setup   To begin, set up one IP Agent application with the options you want. Follow these steps:

....

1   Open the Tools menu and select Options to display the Options window.
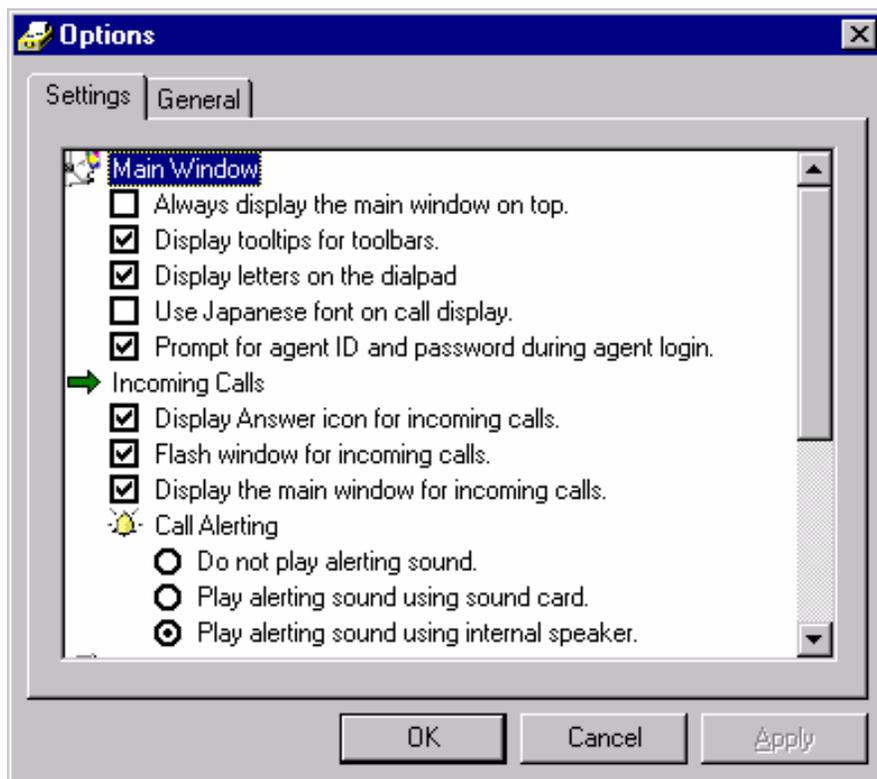
Tip: See Administering Options [7-5] for more information.

....

2   Do one of the following:

- If your station or agent login is administered as Auto-Answer, click the Auto-Answer option to enable it. Then click OK, and reboot your computer.

- If your station or agent login is not administered as Auto-Answer, click Cancel.

....

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3   Register the phone. Then change the button names you want to change in the Phone Features dialog box.
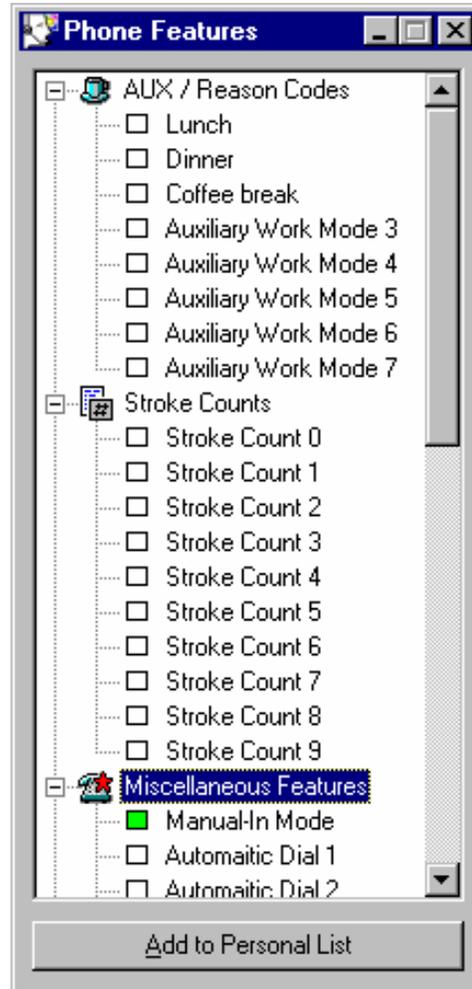
Tip: See Using Phone Feature Options [6-15] for more information.

4   To change a button label, right click once on the label then select Rename. Type the new name over the old name.

Important! If you want to put a subset of the buttons in the Personal Features dialog box, click once on the button and then click the Add to Personal List button.

5 To disallow the changing of the options and button names, use *Windows regedit.exe* command to go to make the following changes to the registry. Go to: *HKEY_CURRENT_USER/Software/Lucent/CentreVu IP Agent/Config/Options/Edit Options*.

6 Right-click on the value and set it to 0. Then reboot your computer.

7 To save the registry settings to a server, select File and then select Export Settings. To download the registry settings to the next computer, select File and then select Import Settings.

8 If you want to copy the Phone Directory files to another computer, first administer all the entries desired into the Phone Directory. Next, clear the Call History log.

9 The phone directory is stored in the following file: *ProgramFiles/Lucent/CentreVu IP Agent/agent.mdb.* Copy the *agent.mdb* file to each computer after IP Agent is installed.

10 Set up the *Windows* telephony dialing for the dial plan of the *DEFINITY* ECS. (The call back number does not use the telephony settings.)

   Tip: See Administering Dialing Properties [7-2] for more information.

11 If the modem is on the PSTN (Public Switched Telephone Network), set the dialup network properties to *not use* the *Windows* dialing properties.

12 Make sure that the following *DEFINITY* ECS Administration fields are set for the station you plan to take over with IP Agent:

   • "IP Softphone" is "y"

   • "multimedia mode" is "enhanced"

   • "service link mode" is "permanent" or "as needed"

....

13   If you want an emergency backup for local agents, administer
           auto-answer for the station and not for the agent ID. You will need to
           administer VOA (VDN of Origin Announcement) for the analog set.
           Then, if you manually log in to the analog set, you can take calls.

....

14   One *DEFINITY* C-LAN card can handle 500 dual connect IP Agents.
           If you have more than that, you will need to assign different C-LAN
           IP addresses. A DNS (Domain Naming System) server could assign
           these automatically.

           Important! The "automatically start CentreVu IP Agent when
           Windows is started" option during installation is *not* very useful if you
           are using a dial-up connection with dynamic IP addresses.

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8   Troubleshooting

Overview

Purpose   *Troubleshooting* provides information that can assist you in solving problems you might encounter when installing or running IP Agent. This information does not include *DEFINITY*® ECS troubleshooting messages. You can find *DEFINITY* ECS troubleshooting messages on the CD-ROM, *DEFINITY ECS Release 8.2 Documentation CD* (555-233-813).

Troubleshooting includes the following topics:

- Installation Problems [8-2]
- Registering and Login Problems [8-3]
- Cannot Make or Receive Calls [8-10]
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- Logging Out and Unregistering [8-15]

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Installation Problems

Introduction   The information below presents some common problems that you might encounter while installing IP Agent.

Problem

When installing *CentreVu*® IP Agent on *Windows NT*®, a message box appears displaying the following message: "The OLE system files are in-use and cannot be updated. This installation will restart *Windows*® to update the OLE system. You must run this Setup again after *Windows* restarts to complete the installation." The installation then cancels.

Solution

Restart the *Windows* system and then run *setup.exe*.

Problem

Your PC does not have enough memory to install IP Agent.

Solution

IP Agent requires the following:

- Hard disk with at least 25MB of space available.

- Minimum of 32MB of RAM if you are using *Microsoft*® *Windows NT* 4.0 or *Microsoft Windows NT* Workstation.

- Minimum of 16MB of RAM if you are using *Microsoft Windows* 98 or *Microsoft Windows* 95. If your PC does not have enough disk space or RAM, you will need to add some.

Problem

When you are installing IP Agent, you get the following error message: "...cannot completely install because NetMeeting is already running."

Solution

You need to quit the install. Open *NetMeeting*®. Go to "Tools… Options." Under the General tab, verify that "Run Netmeeting in the background when Windows starts" is not selected. If it is, then de-select it. Click OK. Close *NetMeeting*. Go to the taskbar and right click on *NetMeeting* icon to close it. Then begin the installation again.

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Registering and Login Problems

Introduction
Use the following information to help you with problems you may encounter when registering or logging into the *DEFINITY* ECS.

Tip: If possible, try to register the station from another computer. If the station can be registered, then the problem points to an issue on the user's computer. If the station cannot register from any computer, then the problem points to: administration, wrong password, corruption, network problem. If all else fails, try uninstalling and reinstalling IP Agent.

Error Message

Failed to open view. Calls will not be logged.

Solution

This message box appears if there is a problem with the database for the Active Log. The Active Log database may be either missing or corrupted.

Problem

You are missing a .DLL during an install from the server.

Solution

Make sure your view of *Windows* Explorer shows all files when the files are copied over to the server, and that the directory is mapped to a local drive.

Problem

You set the auto-answer option, but it does not work.

Solution

If you have not rebooted after setting the auto-answer option, auto-answer will not work. You will be logged off right after you logged in. Reboot your computer.

Problem

You get the "switch is busy" message during registration.

Solution

Check that TTI is enabled. TTI gets turned off during software upgrade.

Problem

Registration will not work.

Solution

If you have duplicate addresses in your network, registration will fail. Delete duplicate addresses.

Error Message

This version of the registration application is incompatible with the *DEFINITY DEFINITY* ECS software. Call the Lucent Helpline or your Lucent Technologies authorized dealer to obtain the latest version of the registration application.

Solution

The software version of the endpoint software is not compatible with the software version running on the *DEFINITY DEFINITY* ECS to which this endpoint is attempting to register. Assuming that the *DEFINITY DEFINITY* ECS is running the latest software version, obtain the latest software version of the endpoint software and re-register it. If the endpoint is already running the latest software version, then the *DEFINITY DEFINITY* ECS is not running the latest *DEFINITY DEFINITY* software version. Either obtain an older version of the endpoint software version, or upgrade the *DEFINITY DEFINITY* ECS to the latest software version

Error Message

Your login attempt was unsuccessful due to one or both of the following conditions:

- You entered an invalid extension.

- You entered an invalid password.

Solution

Re-enter your extension and/or password and then choose the Login button.

1. For the extension for which you are registering, verify that the extension is administered on the *DEFINITY* ECS associated with the IP address you specified on the DEFINITY® Login screen.

2. If this extension is administered, verify that the password specified on the DEFINITY® Login screen is the same password administered on Page 1 of the Station form in the Security Code field.

Error Message

Either the call control application or the voice connection destination you have selected is not compatible with the extension you have specified or your extension is not properly administered. Please contact your system administrator.

Solution

Verify the following:

- If you are registering using the Roadwarrior or Telecommuter configurations, verify on the DEFINITY® Login screen that the extension number which with you are registering is administered as a valid *DEFINITY IP*® Solutions set type on the Station form, page 1. Valid IP Solutions set types can be found in the release letter for IP Agent. Note that BRI sets cannot be IP Agents. If a station is administered as a BRI set, the "IP Agent?" field is not visible on the station form.

- If you are registering using the Roadwarrior or Telecommuter configurations, verify on the station form, page 1 that the IP Agent field = Yes for the extension with which you are registering.

- If you are registering using R/T, verify on the DEFINITY® Login screen on the endpoint that the call control application selected is "CentreVu IP Agent."

- If you are registering using R, verify that on the Station form, page 1, an administered H.323 extension is entered in the "Media Complex Extension" field 5.

- If you are registering using Native, verify on the DEFINITY® Login screen that the extension number with which you are registering is administered as an H.323 set type on the station form, page 1.6.

- If you are registering using Native, verify on the SAT using the "list multimedia ip-softphones" command, that the extension with which you are registering is not listed as a ″Media Complex Extension″ for any other station. If it is, select either another H.323 extension, or go to the station form for the station listed, and blank the Media Complex Extension field on page 1.

- If the extension with which you are registering has a Data Module, you cannot register using that extension. Verify on the station form, page 1, that Data Module = N. Note that set types with integrated data mods (for example, 510, 515, and 7407D) cannot be *DEFINITY IP* Solutions endpoints.

Error Message

The extension to which you are trying to log in is associated with a telephone or another Softphone. Select the OK button to override that association; otherwise, select the Cancel button.

Solution

This is an informative message, not an error message. The extension to which you are registering is either bound to a physical set or another endpoint is currently registered using the same extension. This message is given to tell the user that by registering with this extension, the telephone already bound to the extension will be taken out of service. The DCP set will become a TTI port. Selecting OK will allow the registration to proceed.

Error Message

A login attempt was unsuccessful due to one of the following conditions:

- The network or server is experiencing problems.

- You entered an invalid IP address or node name. Re-enter your IP address or node name and then choose the login button.

Solution

This message is given when the endpoint cannot communicate with the *DEFINITY* ECS. The endpoint sent the login request to the *DEFINITY* ECS, but does not receive a reply back. The endpoint may not be communicating with the *DEFINITY* ECS due to entering the

incorrect IP address or node name for the *DEFINITY* ECS on the DEFINITY® Login screen.

- Verify that the IP address or node name is the correct address or name for the C-LAN board on the *DEFINITY* ECS with which the extension is administered.
  It may also be that the *DEFINITY* ECS is having problems and is not able to receive messages from the endpoint or send messages to the endpoint.

- Verify that the endpoint can ping the *DEFINITY* C-LAN board and that the *DEFINITY* ECS can ping the endpoint.
  Additionally, the network may be experiencing problems, including congestion, which prevent packets from being received by the *DEFINITY* ECS or by the endpoint.

Error Message

The system is currently busy and is unable to log you in at this time. Please try again in a few minutes. If the problem continues, please contact your system administrator.

Solution

Do any of the following:

- Verify on the system feature form page 2 that terminal translation initialization (TTI) enabled = Y.

- Verify that a ″save translation″ is not being performed on the *DEFINITY* ECS. If it is, wait until the transaction is complete and then re-register.

- Verify that system administration work is not being performed on the extension for which you are registering. That is, verify that no one is currently modifying the station form of the extension for which you are registering.

Error Message

You have been logged off by the server. *DEFINITY* IP Agent application will be shutting down. Please wait….

Solution

This is an informative message, not an error message. The endpoint was unregistered by the *DEFINITY* as a result of a user action, such as:

- While this endpoint was successfully registered, another endpoint registered using the same extension number. The user attempting the second registration was informed that there was an existing telephone or softphone associated with this extension. The user then chose to unregister this endpoint and register with another endpoint.

- A busy-release was performed on the *DEFINITY* ECS for the extension number of the registered user.

Error Message

Your communication to the server was lost. The server or network may be down or experiencing problems. Choose the OK button to return to the log in window and log in again.

Solution

Communication between the *DEFINITY* ECS and the endpoint was severed. There are numerous reason why this may occur. This cause may be in the network, in the endpoint, or in the *DEFINITY* ECS.

Error Message

An error was identified in the DEFINITY® Login Application. Choosing the OK button will allow you to exit the application. Try to log in again. If the error continues, call the Lucent Helpline or your Lucent Technologies authorized dealer.

Solution

Do any of the following:

- Verify that users set type is not a non-display set type. A workaround is to administer the station set type as one with a display. A 7410+ should be administered as a 7410D. A 603D1 should be administered as a 603E1

- Record the processing errors on the *DEFINITY* that occurred during this registration and report them to the appropriate Lucent staff.

Error Message

Login session did not shut down completely. Please wait and try to log in again

Solution

It takes 1-5 minutes for previous IP Agent session to shut down. If you attempted another log in during that time frame, wait and try to log in after 5 minutes. If you are still receiving this message after 5 minutes, reboot the PC.

Error Message

There is not enough memory available to run this application. Please close some other applications or restart *Windows* and try again.

Solution

Close any other applications that may be running and then restart *DEFINITY* IP Agent. Check system and station administration.

The station administration station form should contain the following:

- Page 1: Compatible DCP Set type: Currently 8405B, 8410D, 8405D, 8411D, *CALLMASTER*® II 602, 6408+, 8405D+, 8405B+, 8411B, 6408D, 8405B+, 8405D+, 8434DX, *CALLMASTER* III 603E, 6408D+, *CALLMASTER* IV 603F, 8410B, *CALLMASTER* III, 6416D+, *CALLMASTER* V 607, *CALLMASTER*VI 606

- Page 1: IP Agent = Y

- Page 1: COS corresponds to a COS with PSA = Y

- Page 1: Security Code: has some value

- Page 1: IP Agent = Y

- Page 2: H.320 Conversion = Y

- Page 2: Service Link Mode = permanent or as-needed

- Page 2: Multimedia Mode = enhanced

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Cannot Make or Receive Calls

Introduction   Use the following information to help you if you are logged in but cannot make or receive calls.

Problem

DEFINITY IP Agent starts successfully, but the following message is displayed in the Call Status area at the bottom of the *CentreVu* IP Agent window: "Telephony is not available."

Solution

Do the following:

1.   Log off the *DEFINITY* ECS and then try logging into the *DEFINITY* ECS again. If you are unable to log in and make calls, reboot your PC and then try logging in again.

2.   If you are still unable to log in to the *DEFINITY* ECS, uninstall and re-install the *CentreVu* IP Agent application and then try logging in again.

Problem

When trying to originate a call, after clicking the "Dial Now" button, a message box saying "This action cannot be completed at this time" is displayed.

Also, when receiving a call, after clicking "Answer," the call is dropped.

Solution

There are two possible solutions to this problem:

*   Verify switch ARS, station permissions (COS, COR).

*   If this happens when you are using telecommuter, the Service Link mode on the station form is set to "as-needed," and you are immediately trying to make another call after hanging up, it is because the service link to the station needs to be torn down. This can take up to ten seconds. You can change the Service Link mode to "permanent" and then the service link will not need to be torn down between calls.

Problem

When you place a call, you are connected to the wrong destination (that is, wrong telephone number).

Solution

Make sure the IP Agent dialing properties are set up properly and match the area code of your *DEFINITY* ECS. Click on *View: Dialing Properties*.

Problem

CentreVu IP Agent does not pop-up; neither does Phone Directory or Notes (if options are set for these applications to pop on answer).

There are two possible solutions to this problem:

- Verify that IP Agent administration is set for "Show IP Agent on Ringing," "Show Phone Directory on Answer," or "Show Notes Screen on Answer." Verify by clicking *Properties: Preferences*.

Solution

These types of calls will not cause IP Agent to pop: auto-answer, call pickup, and answer back for paging parked calls. Log Manager will show these calls as outgoing calls.

Problem

When IP Agent starts, a message box appears displaying this message: "There is not enough memory available to run this application. Please close some other applications or restart *Windows* and try again."

Solution

Close any other applications that may be running and then restart IP Agent.

Problem

IP Agent starts successfully, but the following message is displayed in the Call Status area at the bottom of the IP Agent window: "Telephony is not available."

Solution

Right-click the mouse on the Incoming Call Notifier icon in the system tray to determine whether the link to the *DEFINITY* ECS is down.

Do one of the following:

- If the link to the *DEFINITY* ECS is down, try logging into the *DEFINITY* ECS again.

- If the link to the *DEFINITY* ECS is up, IP Agent may be using the wrong service provider. IP Agent should be using the *DEFINITY*/Line service provider.
  To verify that IP Agent is using the *DEFINITY*/Line service provider, perform the following steps:

  1. From the Options menu, choose Change Telephony Provider. The Connect Using dialog box appears.

  2. In the Line box, choose *DEFINITY*/Line.

  3. In the Address box, choose the address for the Telephony Provider.

  4. When finished, choose the OK button.
     A message box appears, prompting you to restart IP Agent for the changes to take effect.

  5. Choose the OK button.

  6. Exit IP Agent, and then restart it to use the new Telephony Provider.

Problem

Existing calls are not displayed in the CentreVu IP Agent window when I start IP Agent.

Solution

Any calls that you make or receive after you start IP Agent will appear in the IP Agent window.

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Active Call Issues

Introduction   This topic defines problems that might occur while you are on an active call.

Problem

This problem is one experienced by telecommuters working at home. The telecommuters get complaints from callers that they receive user's residence Voice Mail or get ringback forever.

Solution

Do any of the following:

- Telecommuters that have Voice Mail provided by their local operating company (such as USWest Voice Mail) for their home phone may receive the complaint that callers to their office phone at times get their home voice mail. This can occur if the user is on the phone (home) and a call is made to their PBX extension number. Possible suggestion is to make sure the telecommuters' callback number isn't used except by *DEFINITY* ECS.

- The "ringback forever" complaint can occur if a telecommuter has their home phone line as their callback number and they have Call-Waiting on their home phone. The user is on the phone and a call is made to their PBX extension and is routed to their home phone line and will receive ringback. User should answer the call or cancel Call-Waiting prior to "logging in," or change their callback number to another line, known only to the *DEFINITY*.

Problem

You are unable to add a participant to a conference call. You receive this message: "The action cannot be completed."

Solution

From the *DEFINITY* SAT, verify "Conference parties…" on the "System-parameters Features Form," page 5, is not exceeded.

Problem

You receive the message, "Communication to the server has been lost. You will be logged off by the server." Your only option is to click OK. If you click OK, you will be logged off and brought back to the DEFINITY® Login screen.

Solution

If you are on an active call and do not click OK, you can continue on the call without interruption. In other words, ignore the message until your call is completed. The problem arises when a "Keep Alive" signal might have been lost between the PC and the *DEFINITY* ECS. Reestablish the data connection and then click Cancel.

Problem

Incoming call rings and you answer it. Your talkpath is fine, but the PC continues to ring after you've answered the phone.

Solution

Reboot your PC.

Problem

After logging into IP Agent, you get the message, "Service link to telephone not established." You select OK and can now make and receive calls. However, you do not receive audible alerting for incoming calls; you only receive visual alerting on IP Agent.

Solution

This is a PC timing issue. You need to manually shut down Call Alerting by right clicking on the icon in the windows tray. Then manually re-open "Call Alerting from Start… Programs.. IP Agent - Incoming Call Notifier."

Problem

You are unable to conference or transfer.

Solution

There are two possible solutions to this problem:

- You only have one appearance of the extension on your IP Agent. You must have at least two to conference or transfer.

- If other TAPI applications, such as SNAP Connection, were running on the PC when you started IP Agent, you will not be able to transfer. Close the other TAPI applications, open IP Agent first, and then open the other applications.

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Logging Out and Unregistering

Introduction   This topic presents problems you might encounter while unregistering or logging out of *DEFINITY* ECS.

Problem

Using the DCP set, you cannot make or receive calls. Dialing results in an intercept tone.

Solution

Check if the status station shows the station is an *x port*. If so, the DCP set has been taken over by IP Agent. You may still be logged into IP Agent. Or, if you have logged out of IP Agent, you may need to re-associate your set by dialing the PSA Associate code, followed by your extension number and password number.

Problem

After PSA'ing back into DCP set, the message waiting lamp does not immediately come on.

Solution

Due to the high amount of traffic in the *DEFINITY* ECS, if you have messages waiting it can take a few minutes for the lamp to come on.

Problem

After PSA'ing back into DCP set, your phone is still not working.

Solution

Two possible solutions are:

- Retry PSA.

- Test the station with *DEFINITY* SAT.

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Glossary

Abbreviated Dial Feature

Allows the agent to store selected telephone numbers for quicker and easier dialing. Each number can be a complete or partial telephone number, an extension number, or a trunk or feature code.

ACD

See Automatic Call Distribution.

Active Call

A call appearance state where the voice (talk) path between two parties has been connected; for example, a caller and an agent.

ACW

See After Call Work.

Add/Remove Programs

A *Windows*® feature that allows you to remove programs that have been installed on your computer. The Add/Remove icon is found in the Control Panel dialog box.

After Call Work (ACW)

An ACD agent work mode in which agents are unavailable to receive ACD calls. Agents should enter the ACW mode to wrap-up call-related work before the next ACD call is delivered.

Agent

A person who receives calls that are directed to a split or skill.

Agent Information Panel

This panel is displayed when there are no calls and there is status information. If the agent is logged in, the status information also includes the agent mode (for example, Auto-In and Manual-In).

Agent Mode

The agent skill set associated with your EAS agent ID. To use IP Agent, you need to log into agent mode in order to receive ACD (Automatic Call Distribution) calls. Logging into agent mode makes the Agent toolbar available for your use.

Agent Skill

An attribute that is associated with an EAS ACD agent. Agent skills can be thought of as the ability for an agent with a particular set of skills to handle a call that requires one of a set of skills. An agent can be assigned up to 20 skills. The meaning of each Agent Skill is defined by the customer. Examples of what could be considered skills are: the ability to speak a particular language or the expertise to handle a certain product.

Agent State

A feature of agent call handling. Agent states are the different call work modes and call states an agent can be in (logins, logouts, After Call Work, AUX, and so forth). Data about these states is displayed in the history log.

Agent Toolbar

A toolbar that provides buttons for agent login and logout and agent modes, such as Auto-In, Manual-In, and After Call Work.

Application Folder

A folder on the network server that holds IP Agent application software-executable files and components.

Assist

Allows an agent to request assistance (whether on an active ACD call or not) from the split or skill supervisor by pressing the Assist button or by putting the call on hold and dialing the Assist feature access code, followed by the split group number. The agent must be logged into the split.

Auto Dial

A modem feature that opens the line and dials the telephone number of another computer to establish connection.

Auto-In

An ACD work mode. In the Auto-In mode, when an agent disconnects from a call, he or she is automatically available to receive another ACD call.

Automatic Call Distribution (ACD)

A method of call distribution where EAS agents are placed called "skills." An EAS agent can be logged into up to 20 skills simultaneously. For each skill, EAS distributes calls to the agents' voice terminals by using one of two call distribution methods: UCD or Expert Agent Distribution (EAD).

AutoPlay

A *Windows* feature that causes an application on a CD-ROM to run without any user interaction as soon as the CD-ROM is inserted into the drive.

AUX

See Auxiliary Work.

AUX RC

See Auxiliary Reason Code.

Auxiliary Reason Code (AUX RC)

An EAS feature that enables a call center to track an agent's time more precisely when the agent is in the AUX state. A customer-defined numeric code that describes the reason for entering the AUX work state, such as lunch or meetings.

Auxiliary Work (AUX) Mode

An ACD agent work mode indicating the agent is unavailable (for example, on break or in training) to receive an ACD call.

Available

An agent state in which the extension is able to accept an ACD call. This is a substate of Auto-In and Manual-In mode.

Basic Conference

Allows an agent to add parties to a call (up to five parties can be added, for a total of six on the call). The agent selects Conference, dials the number, talks to the party, and selects Conference again. *See also* Enhanced Conference.

Basic Transfer

A transfer option that lets the agent send the present call to another phone number or extension. The agent remains on the line until the call is answered and announces the call if desired. *See also* Enhanced Transfer and Unsupervised Transfer.

Call Appearance

The call appearance is an IP Agent graphical control that provides the agent with a Call Information Panel and a Phone Display area. See Call Information Panel and Phone Display.

Call Information Panel

The Call Information Panel (CIP) is a single panel (40-character display) that provides information about a single call, such as name, call duration, status icon, and control buttons (for example, Answer/Release and Reconnect).

Call Park

To park a call for retrieval at any extension.

Call Pickup

To answer a call to a member of your pickup group when your voice terminal is idle.

Call Prompting

A switch feature that routes incoming calls based on information entered by the calling party, such as an account number. The caller is prompted to select an option from those listed in an announcement.

Connected

A trunk state in which a caller and an agent are connected on an ACD call.

Cut-Through Dialing

As a digit is entered, it is immediately dialed (as on a telephone). Cut-through dialing is provided using the Dial Pad or by entering digits from the keyboard when focus is not on the Number text box.

DDE

See Dynamic Data Exchange.

DEFINITY® ECS

DEFINITY Enterprise Communications Server. The *DEFINITY* ECS is a telecommunications system that routes voice and data information between various endpoints (for example, telephones, terminals, and computers), provides highly robust networking capabilities, includes an extensive set of standard features (for example, Attendant Consoles, Voice Processing Interface, Call Coverage, DS1/E1 Connectivity, Hospitality Support, Recorded Announcement, and Trunk-to-Trunk Transfer), and provides flexibility. It also allows for the addition of optional features and upgrades to the system as business needs change.

DEFINITY IP® Softphone

DEFINITY IP Softphone enables agents to log into their company's *DEFINITY* server remotely and make and receive telephone calls from their telephone extensions.

Delimited Text File

A file containing values separated by commas, tabs, semicolons, or other characters.

Dial Area

A frame located on the CentreVu IP Agent main window that provides dialing capabilities.

Dial Pad

A toolbar that displays the 12 characters that are on the telephone dialpad. The 12 buttons are used to dial a number. Each character clicked is automatically sent. This is called cut-through dialing.

Dial Number Button
A button (telephone icon) on the Dial Number toolbar that is used to get a dial tone (for cut-through dialing) or to dial the digits entered in the Number text box (senderized dialing).

Dial Number Toolbar
A toolbar that provides a number text box access to the phone directory, call history, speed dial, and recent calls list. When an agent enters a string (for example, *lan*) followed by Enter, a popup menu displays with a list of the directory entries that start with that string. If the first character of the number is a letter, the title of the field will be changed from Number to Directory.

DNS
See Domain Naming System.

Domain
A subnetwork comprised of a group of clients and servers under the control of one security database.

Domain Naming System (DNS)
Software that lets users locate computers on the Internet by host name. The DNS server maintains a database of host names and IP addresses.

Drop
Allows you to disconnect from an ACD call or non-ACD call. Drop disconnects you from a call and gives you a dial tone. Use Drop when you want to disconnect from a call and place another call. You can also use Drop to disconnect the last person added to a conference call.

Dynamic Data Exchange (DDE)
A message protocol in *Windows* that allows application programs to request and exchange data between them automatically.

EAS
See Expert Agent Selection.

Enhanced Conference
Allows you to add parties (up to six) to a call. You select Conference, type the number to be called into a text box, and click OK. After talking to the party, you can either click Yes to add the party or No to not add the party to the call. See also Basic Conference.

Enhanced Transfer
A transfer option that lets you send the present call to another phone number or extension. You select Conference, type the number to be called into a text box, and click OK. You are provided with an "Transfer the party?" text box in which you can select Yes to transfer the party or No to not transfer the party. *See also* Basic Transfer and Unsupervised Transfer.

Eurofont

A font set provided in DCP terminals that contains characters with diacritical marks common to other languages. Eurofont includes characters from the Russian, Greek, Baltic Rim, and central European languages, as well as the first 127 characters of the standard ANSI table. The True Type Font encoding used for Eurofont is non-standard relative to the encoding used in other *Windows* fonts. As a result, IP Agent is able to support Eurofont characters in the displays received from the *DEFINITY* ECS.

Expert Agent Selection (EAS)

An optional *DEFINITY* ECS feature that builds on the power of the Call Vectoring and ACD features of the *DEFINITY* ECS to match skills required to handle a particular call to an agent who has at least one of the skills that a caller requires. Agents are assigned a single set of work mode buttons, rather than one set per split.

FAC

See Feature Access Code.

Feature Access Code (FAC)

A 1-to-4 digit number with an optional leading * or # that is assigned in *DEFINITY* ECS administration to invoke features. For example, *81 may invoke Service Observing Listen Only. FACs require an available call appearance with dial tone before the FAC can be sent to the *DEFINITY* ECS. Assigned FACs may not be available to all users on *DEFINITY* ECS based on his/her class of restrictions and/or whether the feature has been enabled in the *DEFINITY* ECS.

Feature Button

A button placed on the main window that can be assigned to any one of a number of *DEFINITY* ECS features that could be assigned to a physical extension's button during station administration.

Graphical User Interface (GUI)

This is a picture based, rather than command-line based, interaction between the user and the computer.

Grayed Out

When you do not have access to a menu or action list item, it will be grayed out (that is, dimmed or displayed in a different color from the rest of the menu or action list).

GUI

See Graphical User Interface.

Hold

Allows an agent to disconnect from a call temporarily, use the toolbar for other call purposes, and then return to the original call.

HTML

See HyperText Markup Language.

Hypertext

A linkage between related text. For example, if you select a word in a sentence, information about that word is retrieved if it exists, or the next occurrence of the word is found.

HyperText Markup Language

HTML. A standard for defining documents with hypertext links. See also *Hypertext*.

Installation Folder

A folder on the network that holds all of the IP Agent files. *Setup.exe* is run from this folder to install IP Agent on each computer.

Internet Protocol Address (IP Address)

Each computer has its own unique IP address which is an identifier used for communicating across a network.

IP Address

See Internet Protocol Address.

Kanafont

A font set provided in DCP terminals that contains Katakana characters (used in Japanese language) as well as the first 127 characters of the standard ANSI table. The True Type Font encoding is non-standard relative to the encoding used on other *Windows* fonts. As a result, IP Agent is able to support Katakana characters in displays received from the *DEFINITY* ECS.

LAN

See Local Area Network.

Local Area Network (LAN)

A private interactive communication network that allows computers to communicate over short distances at high data transfer rates.

Log

A file that contains a record of computer activity as well as backup and recovery data.

Login

Allows an agent to log into the *DEFINITY* ECS so that the agent can receive ACD calls. Non-EAS agents may log in to a maximum of four splits at once. EAS agents can be logged into as many as 20 skills simultaneously.

Login ID

A login number and that allows an EAS agent to log into agent mode and the skills associated with that mode on the switch.

Logout

Allows you to log out of the *DEFINITY* ECS. When the you out of the *DEFINITY* ECS, you cannot receive ACD calls. If you are an EAS agent, you may be requested to enter a reason code before logging out.

Manual-In

An ACD work mode. In the Manual-In mode, the agent automatically enters the ACW mode when he or she disconnects from an ACD call. To become available to receive another ACD call, the agent must manually enter the Auto-In or Manual-In mode.

Network Server

A computer in a network shared by multiple users.

Off-Hook

Off-hook means that the voice path to your telephone is fully functional.

On-Hook

On-hook means that the voice path to your telephone is turned off.

Phone Display

A 40-character display that is located under the Call Information Panel of your CentreVu IP Agent callbar. This display area receives information from the *DEFINITY* ECS so that you can see call and non-call related information, such as call prompting digits and VuStats from the *DEFINITY* ECS.

PSTN

See Public Switched Telephone Network.

Public Switched Telephone Network (PSTN)

The worldwide voice telephone network.

RC

See Reason Code.

Readme File

A file that provides the latest information on a newly released product; in this case, *CentreVu*® IP Agent.

Read-only

A folder or file that can be read, but not updated or erased.

Reason Code (RC)

A customer-defined numeric code that describes the reason for entering the AUX work state or for logging out of the system.

Registry

The system-wide depository of information supported by *Windows*. The registry contains information about the system and its applications, including clients and servers.

Release

Allows you to release an ACD call.

Screen Pop

The ability to automatically display information from other sources, such as databases or Web pages based on an IP Agent triggering criteria.

Send All Calls

To send all incoming calls (except priority, intercom, and personal central office calls) immediately to an assigned extension, AUDIX, or message center for coverage.

Senderized Dialing

When a dial string is entered, the Send Digits button or Enter key must be selected to actually dial the digits. This type of dialing allows for editing of dial strings before sending the digits.

Skill

An attribute that is assigned to an ACD Agent. Agent Skills can be thought of as the ability for an Agent with a particular set of skills to handle a call that requires one of those skills.

Softphone

A software application that enables you to control telephone calls (both incoming and outgoing) directly from your computer.

Split

A group of extensions that receives special-purpose calls in an efficient, cost-effective manner. Normally, calls to a split arrive primarily over one or a few trunk groups.

Stroke Counts

Allows an agent to record the number of times a particular customer-related event occurs. For example, an agent may be asked to press a button each time a customer requests information about a particular item. Stroke Count entries are numbered from 1 through 9. Each number is assigned to a specific item, and the agent enters that number (1–Stroke through 9–Stroke) whenever a customer asks about that item.

Switch

A private switching system providing voice-only or voice and data communications services including access to public and private networks) for a group of terminals within a customer's premises.

TAPI Assisted Dialing

IP Agent supports telephony enabled applications such as *Microsoft*® Scheduler. This support provides the ability for telephony enabled *Windows* applications to originate a call and have the call reflected in the IP agent application.

Toolbar

A row of buttons used to activate various functions of the IP Agent application. The IP Agent main window can contain as many as five toolbars.

ToolTips

Brief descriptions that display when the mouse pointer is over a toolbar button.

Unsupervised Transfer

A call transfer option that lets an agent send the present call to another phone number or extension. The agent selects Transfer, types the number to be called into a text box, and clicks OK to transfer the call. The agent does not talk to the party receiving the transferred call. *See also* Basic Transfer and Enhanced Transfer.

VDN of Origin Announcement (VOA)

A short announcement that is assigned to a VDN through switch administration. The VOA identifies the origin or purpose of a call for the call center agent who answers the call.

VOA

See VDN of Origin Announcement.

Voice Terminal

A telephone equipped with specifically designed features (for example, the Conference or Hold button or Message light) and functional capabilities that distinguish it from a conventional telephone.

VuStats

Information such as agent, split/skill, VDN, or trunk group data.

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