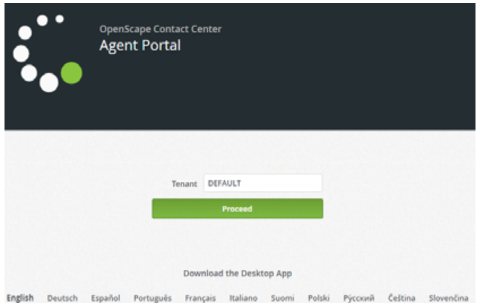
Logging on

Before the user interface is displayed, you must log on.
How to log on:

Step 1 - Specify your tenant

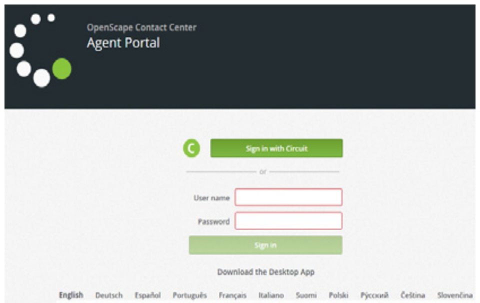
- Open the URL in Chrome, Firefox or Edge:
  https://<ApplicationServer>/agentportal
- If you are logging in for the first time
  - Select your language
  - Enter your tenant name
  - Click Proceed



If your system does not have multiple tenants, then this step is skipped.

Step 2 - User name and password

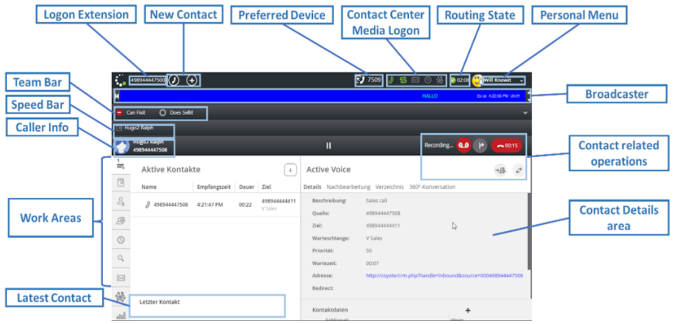
- On the next screen:
  - Enter your user name and password
  - Click Sign in



A different login screen might appear if your system is configured for SSO Sign-on with your corporate credentials.

User interface

The user interface of Agent Portal Web consists of:



Feature control buttons

- Logging on/off for Media Types
  - All Media
  - Telephony (inbound calls)
  - Callback
  - E-Mail
  - Web collaboration (chat)
  - OpenMedia (Facebook, Twiter, WatsApp, ...)

- Receiving telephone contacts
  - Setting your preffered device or working with the integrated phone

- Selecting your routing state
  - Available
    The system assigns contacts to you.
  - Not available
    Unproductive absence
  - Work
    Productive absence

- Actions (on the phone)
- Actions (for contacts)

- Performance Status
  The attendance status is displayed for members of the team, in the team list and in the team bar
  - Logged out
  - Active (in a contact)
  - Idle
  - Absent
  - Busy

Unify OpenScape Contact Center

Agent Portal Web
Basics and Voice Media

Quick Reference Card

A31003-S22B0-U105-01-7619

03/2023

mitel.com

Mitel

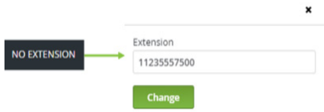
- Starting a new call or initiating a consultation call
- Accepting a call
- Disconnecting a call
- Holding a call
- Resuming a call
- Forwarding a call
- Conference (from existing consultation call)
- Mute (only for integrated phones)
- Postdial DTMF tones (only for integrated phones)
- Starting and stopping voice recording
- Audio and video device settings (only for integrated phones)

- New contact:
  Scheduling a callback or writing a new email
- Terminating Post Processing activity
  or extending Post Processing activity
- Requesting assistance from a designated supervisor
  (in personal menu)
- Requeuing a contact
- Active Contacts
  The list of contacts you are currently editing
- Speed List
  Your personal phone book
- Team List
  The members of your team
- Queues
  The queue statistics assigned to you
- Activity Log
  Contacts in the last 24 hours of login time
- Email
  Your deferred emails and email search
- OpenMedia
  Your deferred OpenMedia contacts
- Search
  Directory search
- Performance
  Your performance statistics
  (available only to you)
- Settings
  Agent Portal Web Settings

- Miscellaneous
  - Choose columns
    Allows you to select the splats in a workplace
  - Items in a list:
    Add, change or remove

Specifying your Logon Extension

- Extension
- Click on "No Extension" and specify your extension.
- If the displayed extension is wrong, click on it and specify a new one.



Logging in as Contact Center Agent to receive Routed Contacts

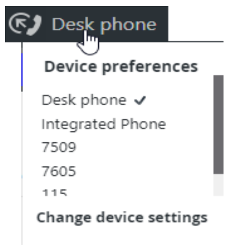
Log in

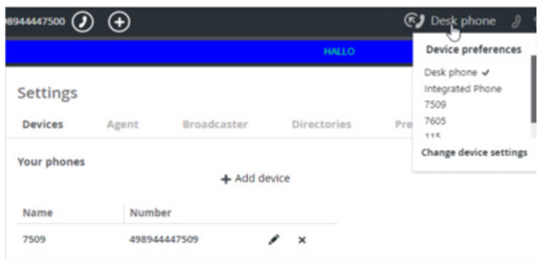
- To login, click one or more media types:
  - Voice
  - Callback
  - Email
  - Web Collaboration
  - OpenMedia
  - Or login to all media
- The buttons turn green when you are logged on.

Select your Routing State

- Select your Routing State from the menu:
  - Available - You are ready to receive calls
  - Not Available - You are on a break or serviced out
  - Work - You are currently busy with another task

- Select your Preferred Device.
- Select a preferred device for Voice and Callback or use the integrated phone.
- Select "Change device settings" to add or remove entries.
- Change the Device Settings.
- Use Settings/ Devices to manage your devices.
  Numbers must be entered in the international format, starting with "+".



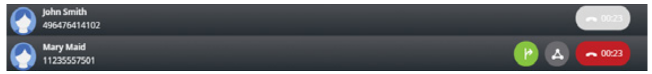


Taskbar

- The taskbar contains all relevant functions to handle contacts.

Call Control Areas

- The call control panel in the main window of the Agent Portal Web provides a convenient way to handle calls.



Call Handling (Media Types Voice and Callback, and direct calls)

Accept or disconnect calls

- To answer calls, click Accept or pick up the headset.
- To end calls, click Disconnect or hang up from the headset.

Call Hold and Retrieve

- To hold calls, click Hold .
- To hold calls, click Retrieve .

Transfer

- To transfer a call, use the Blind Transfer button .

Consultation

- To start a consultation call, use the New call button or dial from one of the work areas.
  In a consultation call, you have the following options:
  - Go back to the original call
  - Join a conference
  - Transfer the call (supervised transfer)

Post Processing (displayed in the main window and in the taskbar)

Exit Post Processing

or

- Click on the Post Processing button to exit or extend Post Processing.

Specify reasons for Post Processing

- Press in an active contact to specify the reason for mutual Post Processing or select the reason from the taskbar menu.

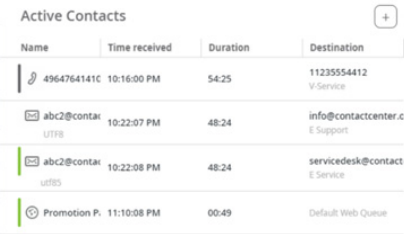
Post Processing pending

or

- If a reason for Post Processing has been selected during a contact, the contact status changes to "Post Processing pending".

Active contacts

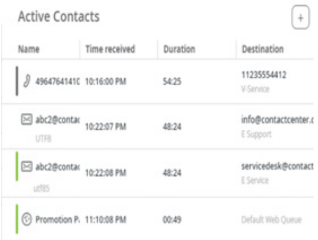
- Active contacts list all the Contacts you are currently handling and the details of previous active contacts.



- The Primary Contact is marked with a dark label, on the left.
- The contacts marked with light green, require your attention.
- To handle another contact, double-click on it. The contact details will be displayed.
- To edit multiple contacts at the same time, the "Multiple Contact Handling" option must be enabled in OpenScape Contact Center by the administrator.

Contact Details Area

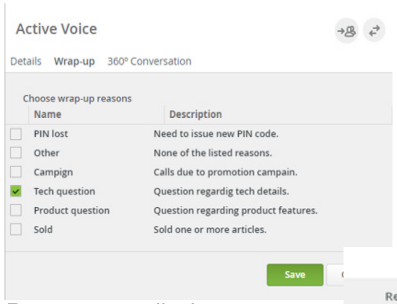
- The Contact Details Area for routed calls provides more information and options:
  - Contact Details:
    Description
    Source
    Destination
    Queue
    Priority
    Wait Time
    Address
    Redirect
  - Wrap-up tab
  - Directory tab
  - 360° Conversation tab
  - Requeue button
  - Post-Processing button

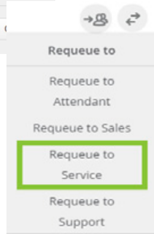


Specify Wrap-up Reasons

- Select the Wrap-up tab, enter a wrap-up reason, then select Save.
- The Wrap-up Reasons can be entered during the call or after the call, if Mandatory Wrap or Post Processing is enabled.

Requeue Contacts

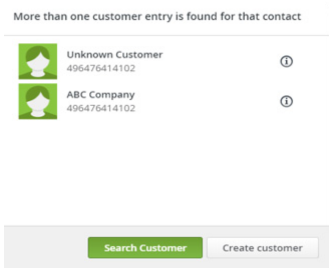


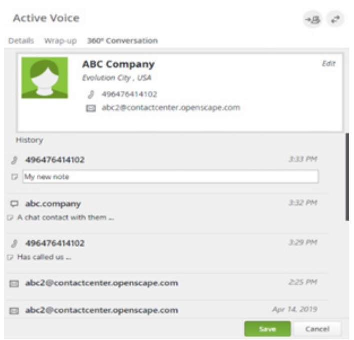


- You can Requeue a call when another queue would be more appropriate.
- To requeue a call, click .
- A menu appears to select the queue target.

360° Conversation

- 360° Conversation can provide an overview of previous customer interactions with the contact center.
- The agent can edit the details and update them while handling a contact.
- This feature must be enabled in OpenScape Contact Center by the administrator.



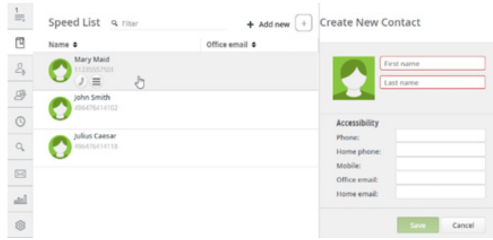


Speed List

- Speed List is a personal phone book for making calls.
- To create a speed list:
  - Add a Speed List entry
  - Click on "+ Add new".
  - Type in the first name, last name and numbers.
  - Click Save.

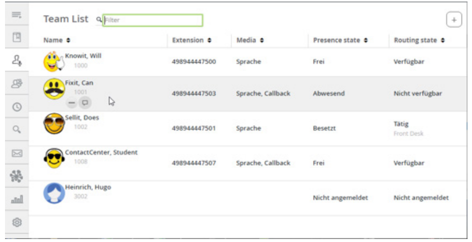
Search

- To edit a contact click on the entry and select "Edit Contact".



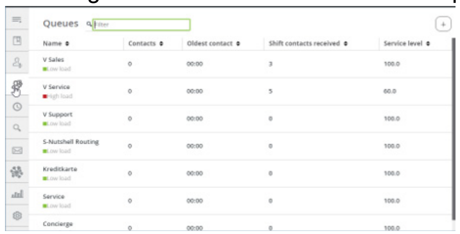
Team List

- This area shows a list of agents in your team and their details and presence state. You can call them directly from Team List.



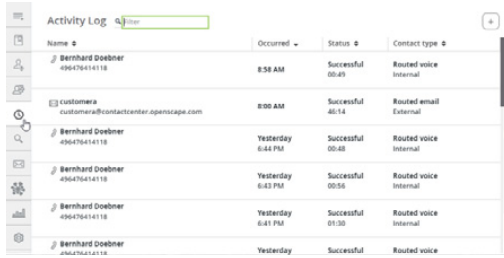
Queues

- This area shows the live queues. You can filter the view for easier searching and choose what statistics to display.

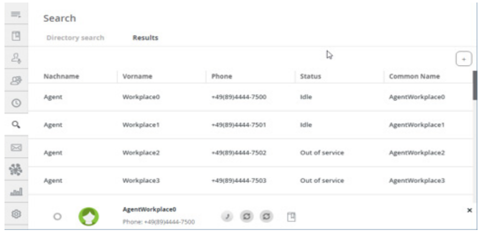


Activity Log

- This area shows recently routed and direct contacts. You can call back an entry in the log or modify the columns.

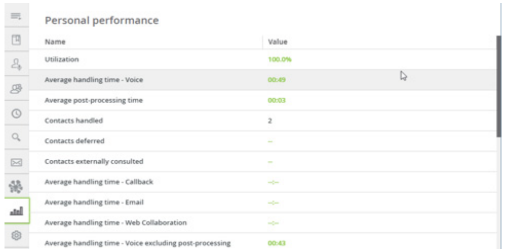


- In this area you can search for directories. This is useful if you have colleagues and customers outside the contact center. The presence status of UC users can be displayed, if configured.



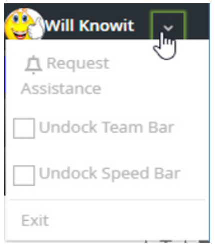
Personal Performance

- In this area you can view your personal performance statistics.



Menu (username)

- Click on the drop-down menu to access the following features:
  - Request Assistance
  - Undock Speed Bar
  - Undock Team Bar
  - Log off from Agent Portal Web



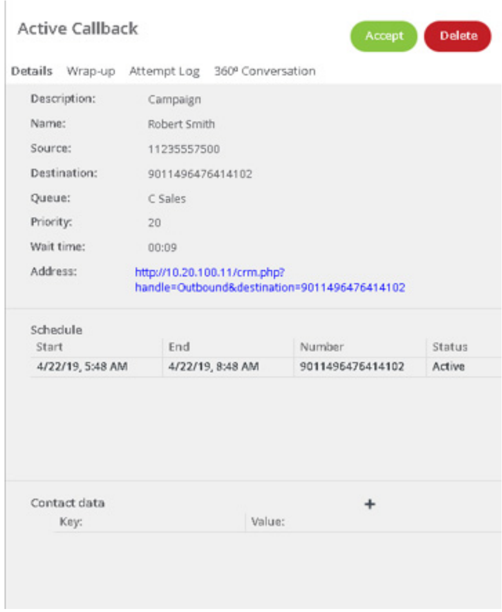
Logging on for media type callback

- Click on the gray Callback icon:
- The icon turns green when you are logged on:
- Select the available routing state to receive callbacks.

Receiving callbacks

- The Active Callback window is displayed when a call-back arrives.
- To accept a callback, click the Accept button: Accept
- Agent Portal Web automatically attempts to dial the destination number.

Active Callback tabs



- Details/Address tab: can be used to access additional information and resources for the callback.
- Wrap-up tab: can be used to select a wrap-up reason.
- Attempt Log tab: lists the agent name, retry reason and the date of each attempt.
- 360 Conversation tab: is displayed only if it has been enabled by your system administrator.

During a call, you can:

- Use all telephony features as usual
- Use the requeue button to add the call to a voice queue.
- Specify Post processing reasons ,as usual
- Delete Callback Delete

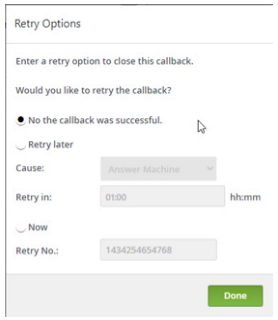
To accept or delete a callback, you need to select a reason from the displayed list.

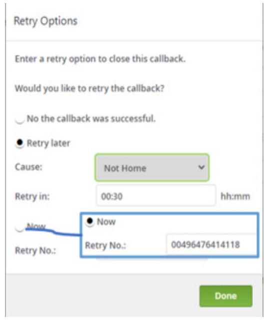
Specifying Retry Reasons

Once a connection is terminated, the Retry Options are automatically displayed.
It is mandatory to enter a callback result:

- If successful, select
  "No the callback was successful".
- If not successful, select
  "Retry later" - select a Cause and the retry time
  or
  "Now" - specify the number to be called right away

When finished, click Done .

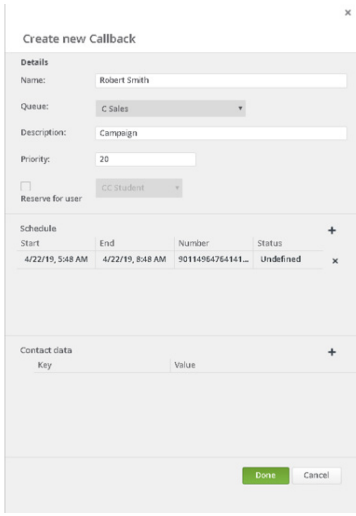


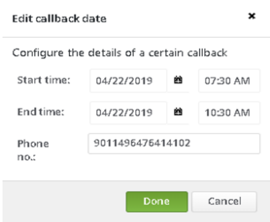


Scheduling a new callback

To create a callback from the New Contact menu, select the "Create new Callback" option and enter:

- Details:
  - Name
  - Queue
  - Description
  - Priority (1 to 100)
  - Reserve for user
- Schedule
  - Time intervals
  - Phone numbers
- Contact Data (optional)





Unify OpenScape Contact Center

Agent Portal Web Callback Contacts

Quick Reference Card

A31003-C1000-U133-01-7619

05/2022

mitel.com

Logging on receive emails

- To receive or send emails, you need to be logged on for the media type.
- Click on the gray Email icon:
- You can obtains the system routed emails if you are in the available routing state.
- You can compose new emails regardless of your routing state.

Receiving Emails

- The Active Contacts window is displayed when an email arrives.
- The email message is displayed on the first tab.
- You can use the information on the other tabs in a similar way as for Voice contacts.
- To edit the email, you can use the following buttons:

Answer - compose a reply

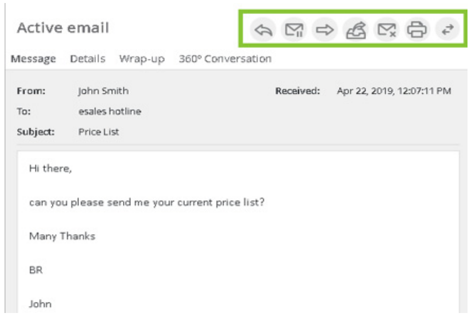
Defer - continue working on the email later

Transfer - transfer to an Agent, externally/consulting

Requeue - add to another queue

Discard - discard the email conversation

Print - print the email conversation



Answering Emails

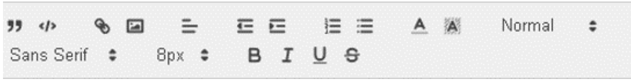
- When replying to an email, the "Cancel" button allows to return to the top level.
- You can simply enter a response message and use the formating tools or use the following buttons:

Show address fields

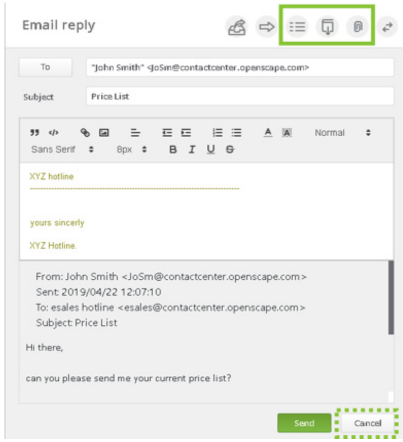
Paste templates

Attachments

- When writing the answer, you can use the formatting tools available in the Toolbox.



- You can use the "Link" button to add hyperlinks to your email answer.
- Spelling and grammar check is provided by your web browser.

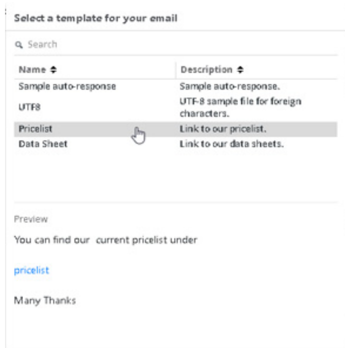


Changing Address Fields

- You can use the "Display Address Fields" menu to select the address email fields you want to display or modify.

Using Templates

- The "Templates" button allows you to use templates created by a manager.
- You can see a preview of the templates in the Email Templates window.



Unify OpenScape Contact Center

Agent Portal Web Email Contacts

Quick Reference Card

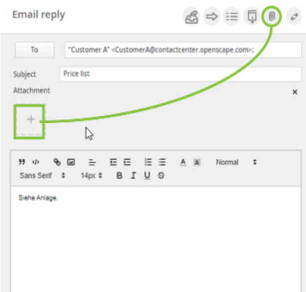
A31003-P3000-U102-5-7619

03/2023

mitel.com

Attachments

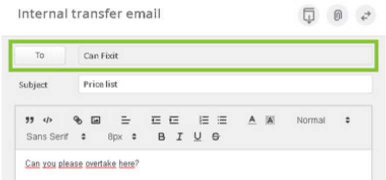
- The Attachments button displays the attachment area, at the bottom of the email.
- To hide the Attachments area, click "X".
- To add attachments from from your local storage, click "+".
- You can view or remove any attachments added.



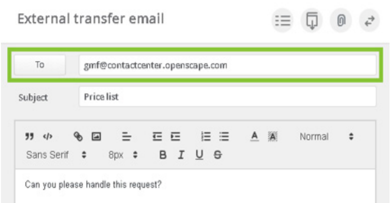
Email Transfer

There are three options for email transfer:

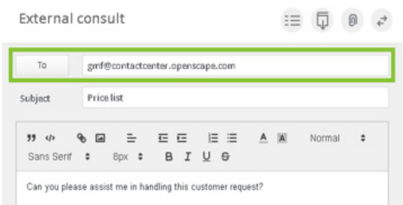
- Internal transfer - to another Agent



- External transfer - to an external party

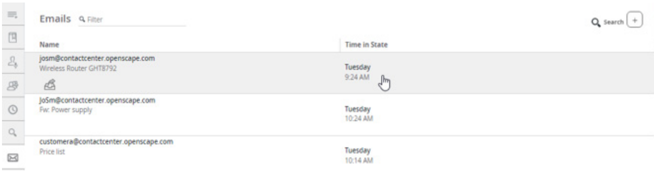


- External consultation - collaborate with external participants



Deferring and Resuming Emails

- To defer emails, agents can use the Pause button.
- Deferred emails appear in the Emails area and can be resumed using the Resume button.



Discarding an Email

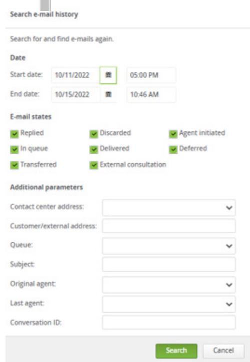
- When discarding an email message, you need to specify the Discard Reason.
- You can still search for a discarded message in the Email area.

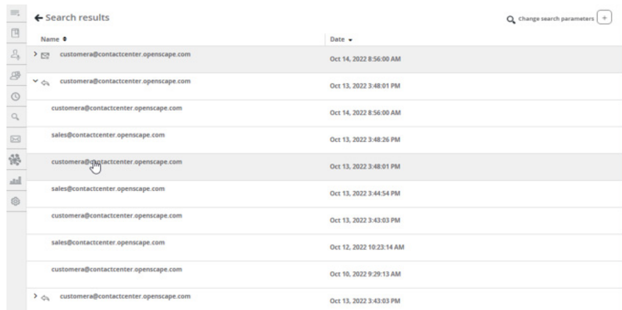
Printing an Email

- You can print an email for a preview of it.

Historical Search

- You can search for the entire email history using the the Search button in the upper right corner of the Email Area.
- You can specify additional search parameters in the form.
- The search results are listed for conversations with several emails.





Logging on receive Web Collaboration contacts (Chat contacts)

- To receive web collaboration contacts, you need to be logged on for the media type.
- Click on the gray Web Collaboration icon:
- You have the option to receive the routed Web Collaboration contacts when you are in the available routing state.

Receiving a Web Collaboration contact

- When the Active Web Collaboration window is displayed, you are in the response mode and you can compose your reply to the contact.
- You can use the following tools:

Request Callback Number - opens a field to enter the customer's telephone number

Transfer Chat - to Agent or to another queue

Invite - ask another agent to join the chat session

Bold - text format

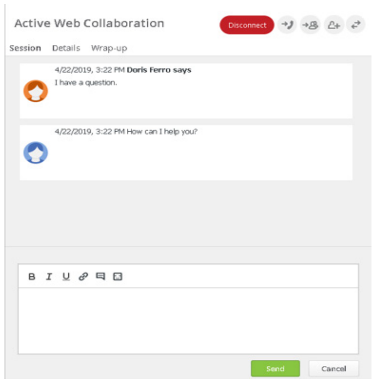
Underline - text format

Italic - text format

URL - adds a predefined URL, as defined in the Manager app

Message - adds a predefined message, as defined in the Manager app

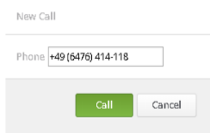
Emoticon - adds an emoticon



Direct Callback

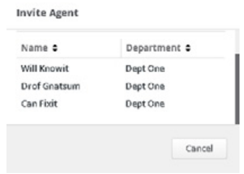
- For Direct Callback, you can request a phone number from the customer.
- Click the "Request Callback Number" button:

- The New Call window is displayed in the Agent Portal Web.



Inviting Agents

- You can invite other agents to participate in an existing session.
- Click the "Invite" button:
- Invited users receive a complete copy of the meeting.



Using Standard Messages

- A Standard Message reduces the time spent in answering web collaboration contacts.
- Click the "Message" button:
- Select one of the predefined Standard Messages.
- The message is inserted in the message input area. You can edit, if desired, before sending.

Using URLs

- You can send a URL, i.e. as a link to a website, paste it into a Web Collaboration message. When the contacts receives the message, the URL will be displayed as a clickable link.
- To do this, click the "URL" button on the bottom of the Active Web Collaboration window:
- The URL is added to your message.

Using Emoticons

- Emoticons, i.e smiling face, are frequently used in electronic messages to convey an informal impression.
- Click the "Emoticons" button on the bottom of the Active Web Collaboration tab:

Unify OpenScape Contact Center

Agent Portal Web
Web Collaboration Chat

Quick Reference Card

A31003-C1000-U133-01-7619

05/2022

mitel.com

Adding text

- To receive OpenMedia contacts, you need to be logged on for the media type.
- Click on the gray OpenMedia icon:
- If more than one OpenMedia channel is configured in your system, you can select the channel from the drop-down menu.
- You have the option to receive the routed Web Collaboration contacts when you are in the available routing state.

Receiving an OpenMedia contact with real-time handling

Example: Facebook Messenger Chat

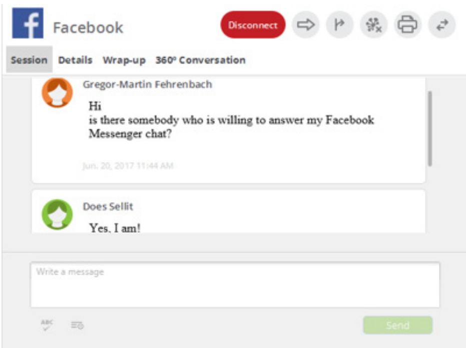
- You can recognize a real-time contact by the red "Disconnect" button.
- When the Active Contact Window for the OpenMedia Contact is displayed, you are in the response mode and you can write your reply to the contact,
- You can use the following tools:

Disconnect Terminate the session - if the other party continues the conversation, a new session will be opened

Transfer - select an Agent to whom you want to transfer this contact

Discard - discard the OpenMedia contact

Print - print the OpenMedia contact



Receiving an OpenMedia contact without real-time handling

Example: Facebook timeline post

- You can recognize a non-real-time contact by the absence of the "Disconnect" button.
- When the Active Contact Window for the OpenMedia Contact is displayed, you are in the response mode and you can write your reply to the contact.
- You can use the following tools:

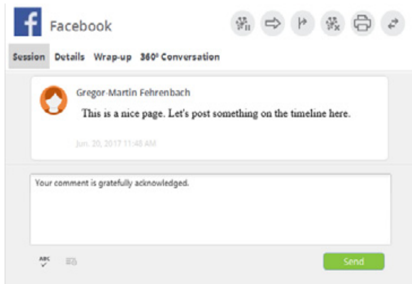
Defer - continue working on this OpenMedia contact later

Transfer - select an Agent to whom you want to transfer this contact

Requeue - select a queue to requeue the contact

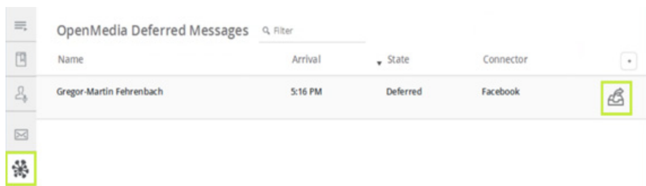
Discard - discard the OpenMedia contact

Print - print the OpenMedia contact



Resuming a deferred OpenMedia contact

- Agents can use the Open Media Deferred Messages Tab to resume their deferred contacts.



Unify OpenScape Contact Center

Agent Portal Web
Open Media - Facebook

Quick Reference Card

A31003-S22B0-U105-01-7619

03/2023

mitel.com

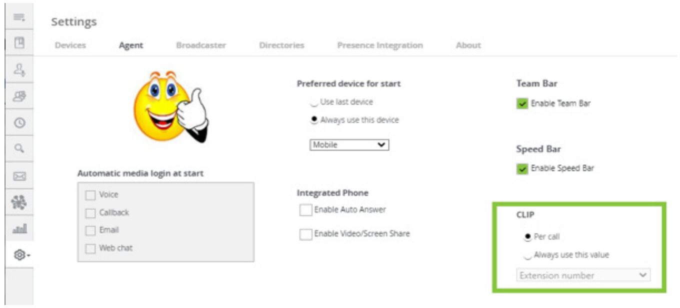
About direct calls and CLIP

- OpenScape Contact Center allows you to include a CLIP when dialing from Agent Portal Web for direct calls.
- Possible CLIP numbers are stored for this purpose by the administrator.
- However, you must first select which CLIP numbers to use when making direct calls in your settings.

CLIP settings in Agent Portal Web

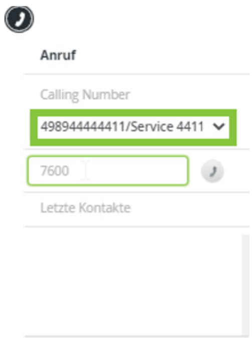
You can:

- Define a CLIP individually by call
- Take a CLIP permanently
- In addition to the CLIP numbers that your administrator has defined, the extension where you are logged on is also available.
- By default, this extension is always used.



Dialing with the Call Button

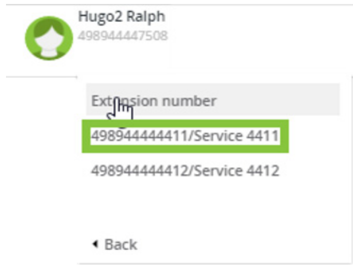
- When dialing directly with the call button, you have a drop-down menu in which you can select the CLIP.



- Agents can use the Open Media Deferred Messages Tab to resume their deferred contacts.

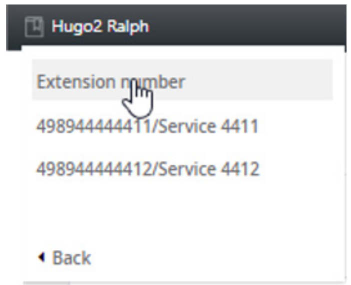
Dialing from the Speed List

- When dialing directly from your Speed List, you have a drop-down menu, where you can select the CLIP.



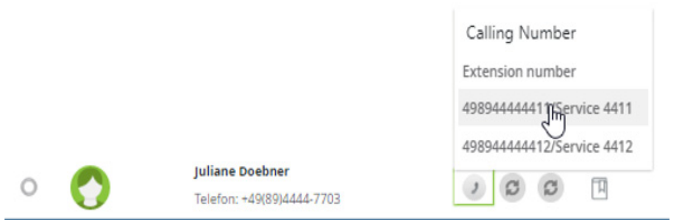
Dialing from the Speed Bar

- If you dial directly from your Speed Bar, you have a drop-down menu where you can select the CLIP.



Dialing from the Directory Search

- When dialing directly from a result of your Directory Search, you have a drop-down menu in which you can select the CLIP.



Unify OpenScape Contact Center

Agent Portal Web
Direct Calls with CLIP

Quick Reference Card

A31003-S22B0-U105-01-7619

03/2023

mitel.com

Mitel

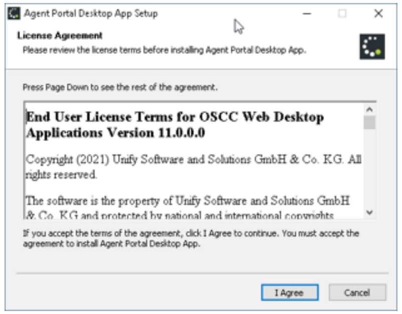
Downloading the Desktop App

- The Agent Portal Web Desktop App runs Agent Portal Web in an Electron-JS environment instead of running it in a Web Browser.
- This allows additional operations on your desktop which are nor allowed from within a web browser.
- Use the link below the login fields to download the Desktop App and start the installation.

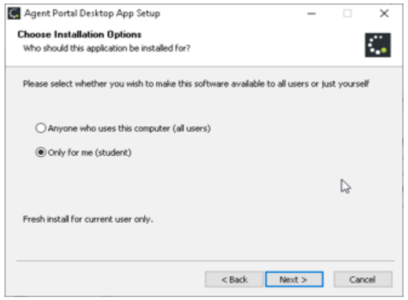
Installing the Desktop App

For the installation, you need to do the following:

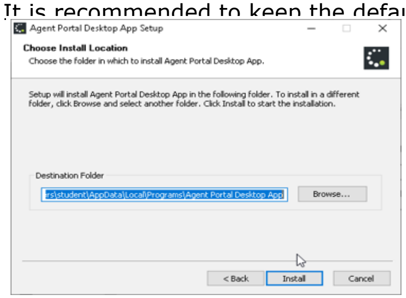
- Agree to the license agreement.



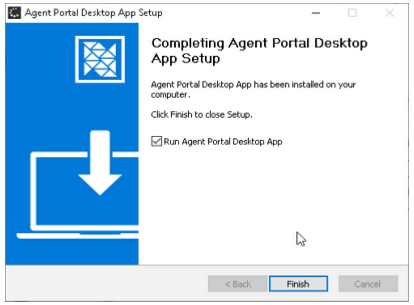
- Select an installation option:
  - Just for yourself: you do not need any special rights on your PC for this
  - For all users: to do this, you need full administrative rights on your PC. Contact your Windows administrator.



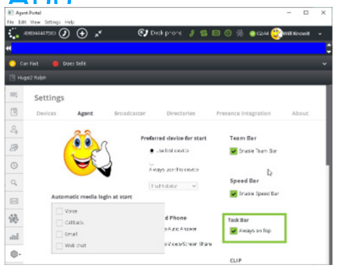
- Choose the installation directory
  It is recommended to keep the default directory.



- Finish the installation.



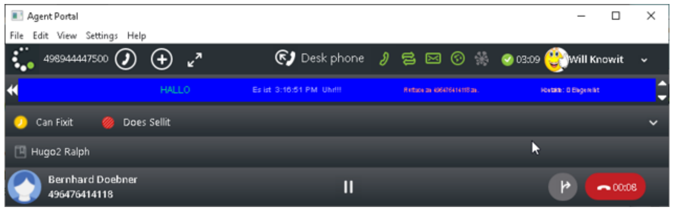
Benefits of Desktop App



- Taskbar mode
  The taskbar mode takes up little space on the desktop and can always be kept in the foreground.
- Automatic opening of programs via the additional information

Working with the Taskbar Mode

- The taskbar mode is activated via the "Taskbar mode" button:
- In taskbar mode, you can perform all phone call functions from the taskbar.
- The rest of the Agent Portal Web application is only displayed when needed or when you exit the taskbar mode.



Unify OpenScape Contact Center

Agent Portal Web Desktop App

Quick Reference Card

A31003-S22B0-U105-01-7619

03/2023

mitel.com

Mitel