

Interaction Center User Guide

# **Table of Contents**

Log In to Interaction Center	. 3
Log In and Log Out of Queues	. 4
Start and Stop Taking Requests	. 4
Accept Interactions	. 6
Handle Multiple Interactions	. 8
Transfer Interactions	. 8
Transfer a Call to an Agent Queue	. 9
Conference a Call	. 9
Enter Wrap-Up	. 9
Wrap-Up Codes	. 9
Monitor Queues	10
Modifying and Reviewing Settings	14
Icon Dictionary	15

## Overview

The Interaction Center provides agents with an easy-to-use interface to respond quickly to voice, chat, and email interactions. It also offers supervisory coaching functions, such as silent monitoring, silent coaching, and barge-in for voice and chat interactions.



Icons are shown in black when the function they represent is available, and they are shown in green or red when the function is currently active.

he following figure shows the Agent Interaction Center user interface.



### Тір

Tip

All features and permissions that are configured on an account-by-account basis are configured as follows, depending on your platform: If you are an Mitel MiVoice Connect customer, configurations are handled by your administrator. If you are a Mitel MiCloud customer, configurations are handled by Mitel.

Left pane	Hea	der.	ter pane		Right	bane
Dusy (Rin	iging) 🔻					agent1 🔻
My Queues	6/18 🔻	ACD Enter Date		10/05/2018	admin hbagent1@qa.shoretel.cor	n 🕞
	_	ACD Enter Time		1:32 AM	© 05·24	•
Solution Sol		Agent Extension		3001	05.24	
		Caller Name			R O	è
ynoh11@qa.s t1_egroup1	08:07	DNIS		5555	10 17	rr
	_	Group		t1_group1		Oct 5, 2018 1:32 AM
e admin t1_group1	05:24 No new msg	Call Profile 1			hi	
						۲
	0					Hide
t1_group1 Avg ACD Talk Ti 00:16	t1_g Avg	roup1 Wait Time i 00:00 t1 group1 Avg Wait Ti	ne o 00:00	group1 00:00	t1_group1 0 ACt1_grou	e <sup>1</sup> Windows
t1_group1 0	t1_e 8	egroup1	0 t1_	egroup1 mber of calls 0	t1_egroup1 RPH of Group 0 t1_egro Number	up1 of Idle 0
			KPI board			

Figure 1: Interaction Center User Interface

## Log In to Interaction Center

Complete the following steps to log in to Interaction Center:

- 1. Browse to the Interaction Center page as follows:
  - Open a browser and browse the following based on your installation:
    - If the Enable HTTPS for Contact Center Clients is enabled during installation, use https://<contact center server IP address or FQDN>:8433/ecc.
    - Determise, use http://<contact center server IP address>:3000/ecc.



### Note

If you encounter any insecure connection error message on the browser, see the *Browser warning message* section in the *MiVoice Connect Contact Center Administration Guide* for more information.

The URL you use to access the Interaction Center can vary based on your configuration. Refer to Table 1 for more information.

Setup	URL
Mitel MiVoice Connect Contact	http://< <i>contact center server IP</i>
Center without Redundancy	address>:3000/ecc
Mitel MiVoice Connect Contact	http:// <hq ip<="" server="" td=""></hq>
Center with Redundancy	address>:8080/ecc
Mitel MiVoice Connect Contact	https:// <contact center="" fqdn<="" td=""></contact>
Center with Edge Gateway	defined in the Edge Gateway>/
Redundancy	ecc
	<b>Note</b> : Contact your system administrator for more information about this URL.

#### Table 1: Interaction Center URLs

2. Enter the Username and Password.



#### Note

These credentials are provided by your administrator.

- 3. Click the arrow or press Enter.
- 4. If your account is configured for hot desking, you will be prompted to enter your extension.

# Log In and Log Out of Queues

You can log in and log out of a specific queues or groups if the required permissions are configured for you.

My Queues	6/18 🔻
	Q
All Queues No Que	eues ^
Personal Agent Q	0
Personal Email Ag	0
t1_egroup1 🗧	0
t1_group1 🗧	0
t1_group40017 🗧	0
t1_group40018	0
4	*

Follow these steps to log in to and out of the queues or groups configured for you:

- 1. Click the downward arrow beside My Queues.
- Click All Queues to log in to all groups configured for you in Contact Center Director. If the Specific Login/Logout option is checked in Agent's Class of Service, then you can view the list of groups configured for you.
- 3. Click the option beside the group name to log in or out of the group.

You can also search for queue names or group names by typing all or part of the name in the search field at the top of the pop up menu.

lcon	Description
[→	Logs the agent in to all queues assigned to the agent.
Ţ	Logs the agent out of all queues assigned to the agent.

Table 2: Log in and Log out icons

# Log Out of All Queues

Follow these steps to log out of all queues:

- 1. Click the downward arrow beside My Queues.
- Click No Queues. The Agent Interaction Center automatically changes the agent status to Not Ready. You will be logged out of all queues. To reset the status to Available, click the downward arrow in My Queues, and click All Queues.



Note

If an agent logs in to all the queues in the **My Queues** drop-down list, the **My Queues** drop-down list shows only **My Queues** and **No Queues**.

## **Understanding Agent Status Indicators**

The status indicator allows you to set your status based on your availability to accept interactions.



You can set the status indicator to either of the following:

- Ready Indicates that you are available for voice, chat, and email interactions.
- Not ready Indicates that you are not available for voice, chat, and email interactions. You can select the appropriate state from the Not Ready States.

# Accept Interactions

You can view all incoming and current interactions in the left pane. You can view call profile information for incoming interactions as follows:

- If you are not already in an interaction, the center pane displays call profile information for the incoming voice, email or chat interaction.
- If there is an incoming interaction while you are already in another interaction, you can click anywhere in the black box surrounding the green icon to view the call profile information for the incoming interaction without actively accepting the interaction.

To accept an incoming email, chat, or voice interaction, do the following:

To accept an email interaction, click in the left panel.

My Queues     1/3     Caller ID <fmexwdvsuser41@mivcblr.com>       Agents     Group     EmailGroup1       Service     EmailGroup1       DNIS     FMEXHB1IRN1@mivcblr.com       Priority     0</fmexwdvsuser41@mivcblr.com>	My Queues       1/3       Caller ID <fmexwdvsuser41@mivcblr.com>         Agents       Group       EmailGroup1         Service       EmailGroup1         DNIS       FMEXHB1IRN1@mivcblr.com         Priority       0</fmexwdvsuser41@mivcblr.com>	My Queues       1/3       Caller ID <fmexwdvsuser41@mivcblr.com>         Agents       Group       EmailGroup1         Service       EmailGroup1         DNIS       FMEXHB1IRN1@mivcblr.com         Priority       0</fmexwdvsuser41@mivcblr.com>	My Queues       1/3       Caller ID <fmexwdvsuser41@mivcblr.com>         Agents       Group       EmailGroup1         Service       EmailGroup1         DNIS       FMEXHB1IRN1@mivcblr.com         Priority       0</fmexwdvsuser41@mivcblr.com>	🕅 🕒 Busy (Ringing) 🔻			FMEX
Agents     Group     EmailGroup1       Service     EmailGroup1       DNIS     FMEXHB1IRN1@mivcblr.com       Priority     0	Agents       Group       EmailGroup1         Fmexwdvsuser4       Service       EmailGroup1         DNIS       FMEXHB1IRN1@mivcblr.com         Priority       0	Agents       Group       EmailGroup1         Service       EmailGroup1         DNIS       FMEXHB1IRN1@mivcblr.com         Priority       0	Agents       Group       EmailGroup1         Service       EmailGroup1         ImailGroup1       Service         Priority       0	My Queues 1/3 🔻	Caller ID	<fmexwdvsuser41@mivcblr.com></fmexwdvsuser41@mivcblr.com>	
Agents     Group     EmailGroup1       Service     EmailGroup1       ImailGroup1     Service       Priority     O	Agents     Group     EmailGroup1       Service     EmailGroup1       ImailGroup1     Service       Priority     0	Agents     Group     EmailGroup1       Service     EmailGroup1       ImailGroup1     Service       ImailGroup1     Priority	Image: Agents       Group       EmailGroup1         Service       EmailGroup1         Image: Drup1       Priority		Caller Name		
Service     EmailService1       ImailGroup1     DNIS     FMEXHB1IRN1@mivcblr.com       Priority     0	Service EmailService1 DNIS FMEXHB1IRN1@mivcblr.com Priority 0	Service EmailService1 DNIS FMEXHB1IRN1@mivcblr.com Priority 0	Service EmailService1 DNIS FMEXHB1IRN1@mivcblr.com Priority 0	💄 Agents	Group	EmailGroup1	
ImailGroup1       DNIS       FMEXHB1IRN1@mivcblr.com         Priority       0	ImailGroup1       ImailGroup1         Priority       0	ImailGroup1       DNIS       FMEXHB11RN1@mivcblr.com         Priority       0	ImailGroup1       ImailGroup1         ImailGroup1       0		Service	EmailService1	
Priority 0	Priority 0	Priority 0	QUEUED INTERACTIONS >	fmexwdvsuser4	DNIS	FMEXHB1IRN1@mivcblr.com	
			QUEUED INTERACTIONS >		Priority	0	
QUEUED INTERACTIONS >	QUEUED INTERACTIONS > (0)						

• To accept a chat interaction, click 💙 in the left panel.

					FINDIQUCC2 +
My Oueuer	1/5 -	Caller ID	10.8.128.95		
my queues	175 •	Caller Name			
ChatCustome		Group	chat group 3		
Chat group 3		Service	chat service		
		DNIS	5555		
		Priority	0		
EUED INTERACTIONS	<ul><li>To acce</li></ul>	pt a voice inter	action, click 🕑 in th	ne left panel.	
	<ul> <li>To acce</li> <li>Busy (Ringing)</li> </ul>	pt a voice inter	action, click 🕑 in th	ie left panel.	FMEXHB
NTERACTIONS	<ul> <li>To acce</li> <li>Busy (Ringing)</li> <li>3/4 ▼</li> </ul>		action, click 🕑 in th	ne left panel. 130199	FMEXHE
My Queues	<ul> <li>To acce</li> <li>Busy (Ringing)</li> <li>3/4 ▼</li> </ul>	Caller ID	action, click vin th	ne left panel. 130199 1DVS	FMEXHE
Agents	<ul> <li>To acce</li> <li>Busy (Ringing)</li> <li>3/4 ▼</li> </ul>	Caller ID Caller Name Group	action, click 💽 in th 5000 FMEXWDVSUSER40 MEX-W Cha	ie left panel. 130199 /DVS t group	FMEXHE
EVED INTERACTIONS	■ To acce Busy (Ringing) 3/4 ▼	Caller ID Caller Name Group Service	action, click vin th 5000 FMEXWDVSUSER40 MEX-W Cha Voice	130199 /DVS t group service	FMEXHE
EUED INTERACTIONS EUED INTERACTIONS My Queues Agents EMEXWDVS EMEXWDV3 EMEX	To acce Busy (Ringing) 3/4 JSE	Caller ID Caller Name Group Service DNIS	action, click vin th 5000 FMEXWDVSUSER40 MEX-W Cha Voice 5000	130199 IDVS t group service 130366	FMEXHE

See Table 3 for information about the icons in Interaction Center.

- 📄 Tip
  - You accept email interactions in the Interaction Center. Once an email interaction is accepted, it is handled in your client application. Emails do not appear in the Interaction Center.
  - You must not alter the subject line while handling emails in the client application because this might impact the email handling.
  - Email attachments larger than 10 MB may delay email delivery by a few seconds.

When you accept an interaction, information about it appears in the center pane and also in the right pane if the interaction is a chat interaction.

- Center Pane All interactions display interaction information, which is also referred to as call
  profile information, in the center pane. The call profile information is pre-defined by the
  administrator.
- Right Pane Chat interactions display the chat conversation in the right pane including the freeform text field at the bottom of the right pane.

Use the free-form text field to type the message you want to convey, and then press the Enter

key. You also can use the image **Template Text** icon, which appears in the lower, right corner of the free-form text field, to select pre-defined messages to send in the chat interaction. When you select a pre-defined message, it is added to the free-form text field where you can modify it as needed, such as to add the customer name, and then press the Enter key to send it.

If your account is configured to use wrap-up, when a voice interaction or chat is ended by you or the caller, wrap-up mode is entered. When you respond to an incoming email interaction by sending an email response from your email client, the email call is ended in the Interaction Center, and wrap-up mode is entered.

Refer to Enter Wrap-Up on page 9 for information about wrap-up mode.

### **Handle Multiple Interactions**

If your account is configured to handle multiple interactions, the left pane of the Interaction Center shows multiple interactions when they are incoming and when they are in process. You can navigate ongoing interactions by selecting them in the left pane. Chats messages that have not been answered will show a message-waiting indicator.

## **Transfer Interactions**

To transfer a call, email or chat, after accepting the interaction, click the  $\frac{1}{2}$  **Transfer** icon. If your account is configured to allow you to transfer interactions to logged in agents, you can enter an agent name to transfer the interaction to. Otherwise, enter the extension to transfer the interaction to someone other than a logged-in agent. You also can enter a full DID to transfer a call to an external number.

When you click **Blind**, the interaction is transferred immediately.

When you click **Consult**, the system contacts the extension or agent you want to transfer to, allowing you to discuss the transfer with the answering party. Click **Complete Transfer**. Click **Cancel** to disconnect the agent you were transferring the interaction to.



### Tips

- Consult does not apply to email interactions.
- Email and chat interactions can be transferred only to logged-in members of the same group that the transferring agent belongs to.

## Transfer a Call to an Agent Queue

If your account is configured to include a personal queue, you can transfer a call to your personal queue using the **( Transfer to My Queue** icon.

## **Conference a Call**

To conference a call, click the <u>Conference</u> icon. Select a logged-in agent, enter an internal extension, or enter a full DID to add to the conference.

When you click **Consult**, the conference is announced to the agent/extension/phone number you want to conference in.

## **Enter Wrap-Up**

When a voice, chat, or email interaction ends, Interaction Center may display Wrap Up information in the right pane if your account is configured to use wrap-up.

The timer in the center of the Wrap Up information shows a count-down to the end of wrap-up mode. You can click **Extend** to allow for more time to complete wrap up. When you click **Extend**, you remain in wrap-up mode until you click **End Wrap Up**.

## Wrap-Up Codes

Tip

To associate one or more wrap-up codes with the interaction, enter the wrap up code name or number in the search field, and then click **End Wrap Up**.

Wrap-up mode applies to voice, chat, and email interactions.



There may be instances where wrap-up codes appear to be missing from reports. This situation is likely caused by an agent logging out of the primary group or the group that routed the call or by the agent closing the Interaction Center.

### Enter Wrap-Up Code(s) During an Active Interaction

To enter wrap-up code(s) during an active interaction, click the **Wrap-Up Code** icon in the right pane, and then select relevant wrap-up codes. Entering wrap-up codes during an active interaction does not impact the interaction.

## **Request Help**

You can request help from a supervisor by clicking the 🖏 **Request Help** icon. Once you click this icon, the supervisor is alerted and can join your interactions to assist.

## **Monitor Queues**

You can monitor your personal queues or pick up an interaction in queue if your account is configured for this ability. You monitor queues by clicking the **Queues** item in the left pane. In the resulting view, you can sort, select, and pick up interactions if permissions allow.

- Display You can display interactions for particular queues by clicking the drop-down arrow in Show.
- Sort You can sort call data by selecting a particular call profile field in Sort By.
- Pick Up You can click the Accept Call icon to manually pick up interactions. This capability is
  permission based.

## **View Agents**

Supervisor permissions allow supervisors to view details about agents assigned to the queues that the supervisors manage.

If you have supervisor permissions, you can view agents' information by clicking **Agents** in the left panel.

- The list of agents assigned to you is displayed in the center panel. Click the agent to view the queues assigned to that agent.
- Search for agents by typing all or part of an agent name, agent extension, or queue name in the search bar.
- Click All to view all agents who are logged in.
- Click Help Request to display agents that have requested help.

### **View Queues**

You can view information about a queue; such as **Caller ID**, **Caller Name**, **Group**, **Service**, **DNIS**, and **Priority**. Your account configuration determines the information displayed for a queue.

De Busy	(Busy) 🔻						agent1 🔻
My Queues	6/18 🔻	Show All	✓ Sort By	ACD Enter Date	~		
CustomerCh	2:45:57	ACD Enter Date	ACD Enter Time Agen	t Extension Caller Name	DNIS	Group Ca	all Profile 1
t1_group1	No new msg	10/04/2018	12:01 AM		ynoh12@qa.shoretel.com	t1_egroup1	
Customer1 In	2:43:58						
_							
	()						Hide
t1_group1 Avg ACD Talk Ti 00:0	00 t1_group1 Avg. Wait Time	i. 00:00 t1_group1 Avg Wait Time	00:00	p1 00:00 t1_g	roup1 0	.ci.yate Windd	<b>N</b> vs
t1_group1 0	t1_egroup1 8	1 t1_egroup1	1 t1_egro Numbe	up1 t1_e r of calls 0 RPH	group1 0	t1_egroup10105 to Number of Idle	activate Windows.

Follow these steps to view information about all or selected queues:

- 1. Click **Queued Interactions** at the bottom of the left panel. The **Queued Interaction** window displays all the interactions.
- 2. Click the **Show** drop-down list to select the queues for which you want to view information. Select **All** to view information for all queues.
- **3.** After you select the queue, select the call profile field by which you want to sort the queue data in the **Sort By** drop-down list.

## **View Key Performance Indicators (KPIs)**

You can view Key Performance Indicators (KPIs) in the KPI board, which is located at the bottom of the Agent Interaction Center. The KPI board details are configured in Class of Service (COS) and can include information such as calls in queue, the number of agents logged in, and the number of agents in release mode. You can use this information to quickly determine whether it is an appropriate time to go into release mode or to finish wrap-up mode.

To hide the KPI board, click \_\_\_\_\_\_ at the top of the KPI board.

# **Join Agent's Interaction**

If you are a supervisor, you can join agent's voice and chat interactions in the following three ways:

6	<b>Silent Monitor</b> — Use this feature to silently monitor the agent's interaction. The agent will know that you are observing the interaction, but you will not be able to interact with the agent or the other participant in the interaction.
ę	<ul> <li>Barge — Use this feature to actively participate in the interaction.</li> <li>The agent and the other participant will both be able to see or hear your participation in the interaction.</li> <li>Note: This icon appears only after the supervisor has initiated Silent Monitor.</li> </ul>
2°	<ul> <li>Silent Coach — Use this feature to silently coach the agent. The other interaction participant will not hear or see your interaction with the agent.</li> <li>Note: This icon appears only after the supervisor has initiated Silent Monitor.</li> </ul>

Complete the following steps to join an agent's interaction:

- 1. Select the interaction in the left pane.
- **2.** Click the appropriate icon depending on the level at which you want to participate in the interaction.
- 3. To exit the agent's interaction, click the appropriate icon again. For example, if you are in the

process of silently monitoring the agent's voice interaction, click the **Silent Monitor** icon to exit the interaction.

## Callbacks

Following are the Interaction Center callback options, which appear as selections when an outbound call is ended by the agent in AIC:

- Successful call
- Call back busy

- Call back no answer
- Do not call back

	~
-17	r
6/	
V	

### Note

The callback options are available only after an agent selects the **Hangup** option in AIC. If the call is hung up before the agent selects this option, the callback options will not be available, and the callback will be considered successful.

The **Call back - busy** and **Call back - no answer** options reinsert the number back into the list. These numbers are called back at a later time based on the dial list preferences configured for your account.

The **Do not call back** option removes the number from the dial list.

## **Downloading Browser Logs**

The Agent Interaction Center stores all the browser activities in the browser local storage area. You can download these logs and send them to Mitel administrators to help them troubleshoot Agent Interaction Center issues.



### Note

- The personal details of the user are not captured in these logs.
- Downloading logs is available only if the browser supports local storage memory.
- The Download Logs option does not appear on the Agent Interaction Center if the browser does not support downloading of logs.

Follow these steps to download browser logs:

- 1. Click the drop-down arrow beside your name in the top-right corner of the interface.
- 2. Click Download Logs.
- A text file containing the browser logs is downloaded to the default Download directory on your system.
- 4. Send the downloaded logs from your local storage area to the Mitel administrator.



#### Note

You must send the logs to Mitel system administrators by email because Mitel system administrators do not have the permissions to view these logs.

# **Modifying and Reviewing Settings**

As an agent, you can modify and review the following settings by clicking the drop-down arrow beside your name in the top-right corner of the screen and then selecting **Settings**:

- Sound Notifications Enable or disable various sound notifications. This field is available only if sound notifications are enabled for your account.
- **Desktop Notifications** Enable or disable the following desktop notification options:
  - Incoming new voice call
  - Confirm outbound call
  - Incoming new chat
  - Incoming new email
  - New chat message
  - Warning messages
  - Forced release



#### Note

If the **Desktop Notifications** option is not selected in Contact Center Director, then the agents cannot enable or disable the desktop notification options from Agent Interaction Center.

agent1 Role : Agent Ext : x3001	
Language	
English	
Allow Notifications	Sounds
Incoming new voice call	•
Confirm outbound call	•
Incoming new chat	
Incoming new email	•
New chat message	•
Warning messages	
Forced release	

The Settings page has the following components:



Note

The Desktop Notifications feature is unavailable for Internet Explorer and Microsoft Edge.

Logged into queues — Review the queues you are currently logged into. If the list of queues you are currently logged in to is longer than the display area, hover your cursor over the Logged into queues list and use the scrollbar that appears to navigate the list.

# **Icon Dictionary**

The following table describes each of the icons available in the Interaction Center.

Tip

Icons are shown in black when the function they represent is available, and they are shown in green or red when the function is currently active.

lcon	Description
+2	Conference in another participant.
Ç	Barge in on an interaction.
S	Indicates a voice interaction.
e	Indicates a chat interaction.
	Indicates an email interaction.
<u>40</u> 2	Indicates that an interaction is part of a conference.
A	Indicates an interaction is on hold.
S	Indicates a voice interaction is in progress.
C	Accepts a voice call.
	Accepts a chat interaction.
Ø	Accepts an email interaction.

#### Table 3: Interaction Center Icon Dictionary

lcon	Description
[sol	Indicates that a call is a conference call.
2	Completes the addition of another participant to form a conference.
6	Ends a voice interaction or allows you to reject an outbound voice callback if your account has been configured for enabled confirmation for abandoned callbacks.
R	Ends a chat interaction.
	Ends an email interaction.
[→	Logs the agent in to all queues assigned to the agent.
Ţ	Logs the agent out of all queues assigned to the agent.
Ð	Alerts the supervisor that an agent has requested help.
	Puts the agent in release mode.
$\bigcirc$	Resumes the agent interaction.
	Displays a list of template chat responses that the agent can select from.
+0	Displays options to create a conference call.
(+fg	Sends an interaction to an agent's personal queue.
€→	Completes the process of transferring a call.
2°	Allows a supervisor to talk or chat with agent without the calling party hearing or seeing the conversation.
$\bigcirc$	Allows the agent to select a wrap-up code.

### Table 3: Interaction Center Icon Dictionary (Continued)