



Using Avaya Workspaces for AACCC and ACCS

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Chapter 1: Introduction

Purpose

This guide describes the tasks that contact center agents can perform using Avaya Workspaces.

Related resources

Avaya Aura® Contact Center Documentation

The following table lists the documents related to Avaya Aura® Contact Center. Download the documents from the Avaya Support website at <https://support.avaya.com>.

Title	Use this document to:	Audience
Overview		
<i>Avaya Aura® Contact Center Overview and Specification</i>	This document contains technical details you need to set up your Contact Center suite. The document contains the background information you need to plan and engineer your system (server preparation information, routing options, licensing configurations, and hardware configuration). The document also contains background information you require to install all software components that are part of and work with Contact Center. General information about considerations for upgrading your existing suite of Contact Center is also included. This document contains strategies and requirements to plan your network configuration and prepare your servers for Contact Center software installations.	Customers and sales, services, and support personnel

Table continues...

Title	Use this document to:	Audience
<i>Avaya Aura® Contact Center and Avaya Aura® Unified Communications Solution Description</i>	This document describes the solution architecture, suggested topologies, and capacities for the Avaya Aura® Unified Communications platform. This document also describes the features and functional limitations of certain configurations.	Customers and sales, services, and support personnel
<i>Avaya Aura® Contact Center and Avaya Communication Server 1000 Solution Description</i>	This document describes the solution architecture, suggested topologies, and capacities for the Avaya Communication Server 1000 platform. This document also describes the features and functional limitations of certain configurations.	Customers and sales, services, and support personnel
<i>Avaya Aura® Contact Center Documentation Catalog</i>	This document describes available Avaya Aura® Contact Center documentation resources and indicates the type of information in each document.	Customers and sales, services, and support personnel
<i>Avaya Aura® Contact Center Terminology</i>	This document contains definitions for the technical terms specific to Contact Center.	Customers and sales, services, and support personnel
<i>Contact Center Performance Management Data Dictionary</i>	This document contains reference tables that describe the statistics and data in the historical and real-time reports generated in Contact Center.	System administrators and contact center supervisors
Implementing		
<i>Avaya Aura® Contact Center and Avaya Aura® Unified Communications Integration</i>	This document contains information and procedures to integrate the Avaya Aura® Unified Communications platform with Contact Center.	Implementation personnel
<i>Avaya Aura® Contact Center and Avaya Communication Server 1000 Integration</i>	This document contains information and procedures to integrate the Avaya Communication Server 1000 platform with Contact Center.	Implementation personnel
<i>Deploying Avaya Aura® Contact Center DVD for Avaya Aura® Unified Communications</i>	This document contains information about Contact Center DVD installation, initial configuration, and verification for the Avaya Aura® Unified Communications platform.	Implementation personnel
<i>Deploying Avaya Aura® Contact Center DVD for Avaya Communication Server 1000</i>	This document contains information about Contact Center DVD installation, initial configuration, and verification for the Avaya Communication Server 1000 platform.	Implementation personnel

Table continues...

Title	Use this document to:	Audience
<i>Deploying Avaya Aura® Contact Center Software Appliance for Avaya Aura® Unified Communications</i>	This document describes how to deploy the Avaya Aura® Contact Center Software Appliance for the Avaya Aura® Unified Communications platform.	Implementation personnel
<i>Avaya Aura® Contact Center Commissioning for Avaya Aura® Unified Communications</i>	This document contains information for Contact Center preparation, process, initial configuration, and verification of the installation on the Avaya Aura® Unified Communications platform.	Implementation personnel
<i>Avaya Aura® Contact Center Commissioning for Avaya Communication Server 1000</i>	This document contains information for Contact Center preparation, process, initial configuration, and verification of the installation on the Avaya Communication Server 1000 platform.	Implementation personnel
<i>Avaya Aura® Contact Center and Proactive Outreach Manager Integration</i>	This document provides conceptual and procedural information on the integration between Avaya Aura® Contact Center (AACC) and Avaya Proactive Outreach Manager (POM); it describes the tasks required for AACC and POM integration.	Implementation personnel
<i>Upgrading and patching Avaya Aura® Contact Center</i>	This document contains information and procedures to upgrade from previous releases to Contact Center, migrating the databases, and information and procedures to download and install service packs.	Implementation personnel and system administrators
Administering		
<i>Avaya Aura® Contact Center Server Administration</i>	This document contains information and procedures for day-to-day maintenance of all servers in the Contact Center suite, including server maintenance tasks, administrative tasks, managing data, configuring data routing, performing archives, and backing up data. It also describes the optional configuration procedures for server configuration.	System administrators
<i>Avaya Aura® Contact Center Client Administration</i>	This document contains information and procedures to configure the users and user access, skillsets, server management, and configuration data in the Contact Center database.	System administrators and contact center supervisors

Table continues...

Title	Use this document to:	Audience
<i>Using Contact Center Orchestration Designer</i>	This document contains information and procedures to configure script and flow applications in Contact Center Orchestration Designer.	System administrators
Maintaining		
<i>Maintaining Avaya Aura® Contact Center</i>	This document contains routine maintenance procedures such as installing service packs, and maintaining the databases for the Contact Center system.	System administrators and support personnel
<i>Troubleshooting Avaya Aura® Contact Center</i>	This document contains system-wide troubleshooting information and procedures for Contact Center hardware, software, and network.	System administrators and support personnel
<i>Contact Center Event Codes</i>	This document contains a list of errors in the Contact Center suite and recommendations to resolve them. This document is a Microsoft Excel spreadsheet.	System administrators and support personnel
Using		
<i>Using Avaya Aura® Contact Center Reports and Displays</i>	This document contains procedures to generate performance reports, and to monitor and analyze performance data and performance measurements.	System administrators and contact center supervisors
<i>Using Agent Desktop for Avaya Aura® Contact Center</i>	This document provides information and procedures for agents who use the Agent Desktop application to accept, manage, and close contacts of all media types in Contact Center.	Contact center agents and supervisors
<i>Using the Contact Center Agent Browser application</i>	This document provides information and procedures for agents who use the Agent Browser application to log on to Contact Center and perform basic tasks.	Contact center agents
<i>Using Avaya Workspaces for AACC and ACCS</i>	This document describes the tasks that Contact Center agents can perform using Avaya Workspaces.	Contact center agents and supervisors

Finding documents on the Avaya Support website

Procedure

1. Go to <https://support.avaya.com>.
2. At the top of the screen, type your username and password and click **Login**.
3. Click **Support by Product > Documents**.

4. In **Enter your Product Here**, type the product name and then select the product from the list.
5. In **Choose Release**, select the appropriate release number.
The **Choose Release** field is not available if there is only one release for the product.
6. In the **Content Type** filter, click a document type, or click **Select All** to see a list of all available documents.
For example, for user guides, click **User Guides** in the **Content Type** filter. The list only displays the documents for the selected category.
7. Click **Enter**.

Support

Go to the Avaya Support website at <https://support.avaya.com> for the most up-to-date documentation, product notices, and knowledge articles. You can also search for release notes, downloads, and resolutions to issues. Use the online service request system to create a service request. Chat with live agents to get answers to questions, or request an agent to connect you to a support team if an issue requires additional expertise.

Training

The following online training courses are available for Avaya Workspaces agents.

Course code	Course title	Delivery type	URL
24330W	Using Avaya Workspaces for AACC and ACCS Agents	WBT	www.avaya.com/AACC-ACCS-Agent

Chapter 2: Changes in this release

The following sections describe the new features and changes in *Using Avaya Workspaces for AACC and ACCS* Release 7.1.

Features

See the following sections for information about feature changes.

New features in Release 7.1 Service Pack 1

There are no new features in Release 7.1 Service Pack 1.

New features in Release 7.1 Service Pack 2

See the following sections for information about new features in Release 7.1 Service Pack 2:

- [HTTPS support](#) on page 15

New features in Release 7.1 Service Pack 3

See the following sections for information about new features in Release 7.1 Service Pack 3:

- [Inline images for emails and signatures](#) on page 16
- [Support for Avaya Workspaces High Availability](#) on page 18

New features in Release 7.1 Feature Pack 1

See the following sections for information about new features in Release 7.1 Feature Pack 1:

- [Avaya Workspaces supports Avaya Co-Browsing Snap-in](#) on page 15
- [Avaya Workspaces supports Open Queue](#) on page 15
- [Avaya Workspaces supports outbound campaign contacts](#) on page 16
- [Customer Journey](#) on page 16
- [Customer Search and Customer History Search](#) on page 16
- [Enhancement of the Email Templates feature](#) on page 16
- [Handling customer records](#) on page 16
- [Integration with Callback Assist](#) on page 17

- [Language support](#) on page 17
- [Multimedia Contact Search](#) on page 17
- [Phonebook](#) on page 17
- [Supervisor features for Voice contacts](#) on page 17
- [Web Statistics](#) on page 18

New features in Release 7.1 Feature Pack 2

See the following sections for information about new features in Release 7.1 Feature Pack 2:

- [Avaya Workspaces keeps focus on the current contact](#) on page 14
- [Avaya Workspaces supports agent skillset partitioning](#) on page 14
- [Avaya Workspaces supports Call Back Request](#) on page 15
- [Avaya Workspaces supports closing contacts](#) on page 15
- [Avaya Workspaces supports observing agent-initiated calls](#) on page 15
- [Avaya Workspaces supports pulling contacts](#) on page 16
- [Email skillset list partitioning in Avaya Workspaces](#) on page 16
- [New utility to release stuck agents or interactions in Avaya Workspaces](#) on page 17
- [Support of reverse proxy for Avaya Workspaces](#) on page 18
- [Web scheduled callbacks available in Avaya Workspaces](#) on page 18
- [Web Statistics widget works without Internet connection](#) on page 18

New features in Release 7.1.2 Service Pack 2

For a summary of new features and enhancements in this release, see the following sections:

- [Consult with another agent during a chat interaction](#) on page 18
- [Observe, coach, and barge in to a chat interaction](#) on page 18
- [Approve or reject an email](#) on page 19
- [Reschedule or forward emails](#) on page 19
- [Search and navigational enhancements](#) on page 19

Avaya Workspaces keeps focus on the current contact

From Release 7.1 Feature Pack 2, if you enable Multiplicity and configure the Auto Answer option by selecting Call Force Delay in a Call Presentation Class assigned to an agent, Avaya Workspaces keeps focus on the current active contact instead of switching to the new contact. For example, if an agent working on an Email interaction receives a new Voice interaction, Avaya Workspaces keeps focus on the Email interaction.

Avaya Workspaces supports agent skillset partitioning

From Release 7.1 Feature Pack 2, you can enable the agent skillset partitioning feature for Avaya Workspaces. You can also apply agent skillset partitioning to transfers to allow agents to perform transfers only to the skillsets assigned to them. You can configure these features in

Contact Center Multimedia Administration by selecting the Enable Agent Skillset Partitioning and Apply Agent Skillset Partitioning to Transfers check boxes. These settings apply both to Avaya Workspaces and Agent Desktop.

Avaya Workspaces supports Avaya Co-Browsing Snap-in

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the Avaya Co-Browsing Snap-in application that allows an agent and a customer to browse the same webpage simultaneously.

Avaya Workspaces supports Call Back Request

From Release 7.1 Feature Pack 2, Avaya Workspaces supports Call Back Request (CBR). CBR provides a comprehensive set of easy to use web services which enable the caller to request a callback while waiting in queue, or automatically call back the abandoned callers when agents are available.

Avaya Workspaces supports closing contacts

From Release 7.1 Feature Pack 2, Avaya Workspaces supports the closing contacts feature. Supervisors or agents can close a contact or multiple contacts using the Close contacts feature of the Multimedia Contacts Search widget. The Avaya Workspaces users can close only Email contacts.

Using the Contact Center Multimedia Administration functionality, administrators can enable the closing of multiple contacts for agents, supervisors, or disable this feature for all user types. These settings apply both to Avaya Workspaces and Agent Desktop.

Avaya Workspaces supports HTTPS

From Release 7.1, Service Pack 2, Avaya Workspaces supports HTTPS for secure communication.

Avaya Workspaces supports observing agent-initiated calls

From Release 7.1 Feature Pack 2, Avaya Workspaces supervisors can observe agent-initiated CDN calls. You can enable this feature both for Avaya Workspaces and Agent Desktop by selecting the Observe Agent Initiated Contact Center Calls check box in the Agent Desktop Common Settings of Contact Center Multimedia Administration. When you disable this feature, Avaya Workspaces displays agent-initiated outgoing calls in the My Agents widgets, but the Observe button is disabled.

Avaya Workspaces supports Open Queue

From Release 7.1 Feature Pack 1, agents using Avaya Workspaces can handle Open Queue contacts. Avaya Workspaces displays Open Queue contacts as Generic.

Avaya Workspaces supports outbound campaign contacts

From Release 7.1 Feature Pack 1, agents using Avaya Workspaces can handle outbound campaign calls. The feature provides the interface that presents outbound campaign contacts to agents, provides agents with preview dial capability, displays agent call scripts (if configured), and saves disposition codes and script results.

Avaya Workspaces supports pulling contacts

From Release 7.1 Feature Pack 2, agents using Avaya Workspaces have parity with the pulling a contact feature supported on Agent Desktop. Agents can pull and open a contact to add or edit information, to complete an outbound contact, or to send a reply to an email message.

Customer Journey

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the Customer Journey widget, which is available for Voice, Video, Chat, Email and Outbound contact types.

Customer Search and Customer History Search

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the Customer Search and Customer History Search widgets, which allows agents to search for customers and information about previous interactions with customers.

Email skillset list partitioning in Avaya Workspaces

From Release 7.1 Feature Pack 2, agents using Avaya Workspaces can create emails only on skillsets configured for them.

Enhancement of the Email Templates feature

From Release 7.1 Feature Pack 1, you can import email templates files from Agent Desktop to Avaya Workspaces. Agents can use the imported email templates when creating email messages in Avaya Workspaces.

Handling customer records

From Release 7.1 Feature Pack 1, agents using Avaya Workspaces can create, view and edit customer records.

Inline images for emails and signatures

From Release 7.1 Service Pack 3, Avaya Workspaces supports adding inline images to emails and signatures. You can add one or several images to the email body to make the information easily accessible to customers. You can also increase brand awareness by adding a company logo to your signature.

Integration with Callback Assist

From Release 7.1 Feature Pack 1, Avaya Workspaces integrates with the Callback Assist (CBA) snap-in application that enables customers calling a contact center to request a call back.

Language support

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the following languages:

- Hebrew with right-to-left (RTL) orientation
- Arabic with RTL orientation
- Traditional Chinese

Multimedia Contact Search

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the Multimedia Contact Search widget, which allows agents to search for multimedia contacts by one or several search parameters, as well as view contact details.

New utility to release stuck agents or interactions in Avaya Workspaces

Release 7.1 Feature Pack 2 implements the Monitoring Service utility, a browser-based tool that allows releasing stuck agents or interactions in Avaya Workspaces. As a supervisor, you can use the Monitoring Service utility to search and log out agents, as well as clean interactions individually or in bulk.

Phonebook

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the Phonebook widget, which displays LDAP and custom contacts. Phonebook allows you to view, filter and search contacts, as well as add, edit or delete custom contacts. You can also call a contact using the click-to-call feature, tag a contact as favorite or add it to the Speed Dial list.

Supervisor features for Voice contacts

From Release 7.1 Feature Pack 1, Avaya Workspaces supports Supervisor features for Voice contacts, such as:

- Observing a Voice contact
- Observing a second Voice contact
- Observing non-skillset calls
- Whisper coaching an agent
- Barging-in on a Voice contact
- Barging-in on a non-skillset call
- Remotely logging out an agent

- Changing agent status

Support for Avaya Workspaces High Availability

From Release 7.1 Service Pack 3, Avaya Aura® Contact Center supports Avaya Workspaces High Availability for fault tolerant and resilient contact center solutions. You can configure Avaya Workspaces High Availability for solutions that support both Mission Critical High Availability and Avaya Workspaces. For data resiliency and disaster recovery, you can also configure Geographic High Availability for Avaya Workspaces.

Support of reverse proxy for Avaya Workspaces

From Release 7.1 Feature Pack 2, Contact Center introduces support for reverse proxy, which allows agents to access Avaya Workspaces from outside the corporate network without VPN connection. You can configure reverse proxy for Avaya Workspaces using Avaya Session Border Controller for Enterprise.

Web scheduled callbacks available in Avaya Workspaces

From Release 7.1 Feature Pack 2, Avaya Workspaces supports web scheduled callback functionality providing parity with the same feature in Agent Desktop. Agents using Avaya Workspaces can handle callbacks requested by customers, as well as create their own callbacks.

Web Statistics

From Release 7.1 Feature Pack 1, Avaya Workspaces supports the Web Statistics feature that allows agents to view their live skillset-related statistics and supervisors to display statistics for all skillsets.

Web Statistics widget works without Internet connection

From Release 7.1 Feature Pack 2, Avaya Workspaces agents and supervisors can use the Web Statistics widget with and without Internet connection.

Consult with another agent during a chat interaction

This chat consultation feature is available with Release 7.1.2.2.

You can consult with another agent during a chat interaction. Messages between agents are whispered so the customer does not see them.

If the other agent agrees, you can do one of the following when ending the consultation:

- Transfer the web chat to the other agent.
- Start a conference.

Observe, coach, and barge in to a chat interaction

These supervisor features are available in Release 7.1.2.2.

As a supervisor, you can use the My Agents widget to observe a chat interaction.

While observing, you can choose to start coaching the agent. During a coaching session, you can send private whispered chat messages to the agent.

If direct intervention is required, you can barge in to the chat interaction. When you barge in, you join the chat interaction as an active third party. You, the agent, and customer can send three-way messages to each other.

Reschedule or forward emails

The following enhancements are available in Release 7.1.2.2:

Reschedule email

You can postpone work on an email and reschedule it for a later time. This is a useful option if you need more time to gather information before completing the email.

Email transfer enhancements and new forwarding option

Previously, you could only transfer an email interaction to a skillset. Now, you can also transfer the email to another agent. In addition, you can also forward an email to any email address.

Approve or reject an email

As of Release 7.1.2.2, a supervisor can approve or reject an email. If the email is rejected, the agent can edit it and add a comment.

Search and navigational enhancements

The following enhancements are available in Release 7.1.2.2:

Multiple keyword search

You can use multiple keywords when searching through email templates and suggested content.

Customer history view

Customer history information for all contact types (voice and multimedia) is now displayed together in the same table.

Other changes

As of Release 7.1.2.2, Windows 7 and 8.1 are no longer supported. Windows 10 and 11 are supported.

There are no other changes in Release 7.1.

Chapter 3: Avaya Workspaces overview

Avaya Workspaces is a browser-based application with which Contact Center agents can handle customer interactions. Agents using Avaya Workspaces can handle voice, video, email, and chat interactions. Agents can also make outbound calls and create ad-hoc emails. The intuitive user interface provides features for toggling between multiple, simultaneous interactions from different contact types.

Avaya Workspaces enables seamless collaboration with customers, partners, and other users within and outside the organization. It also provides relevant information to agents securely and reliably.

Avaya Workspaces supports HTTPS, which you can enable to provide secure communication.

Agents working off-site can operate Avaya Workspaces remotely without accessing corporate network through a Virtual Private Network (VPN). Agents can also run multiple sessions of Avaya Workspaces on different devices simultaneously.

Avaya Workspaces supports the following interaction types:

- Voice calls
- Video calls
- Chat messages
- Email messages
- Outbound campaign calls
- Open Queue (Generic Channel) contacts

Your administrator determines which type of interactions you can handle.

 **Note:**

You can handle Open Queue contacts only if your administrator has customized the Contact Center solution.

Avaya Workspaces displays Open Queue contacts as Generic Channel interactions.

Every customer interaction is displayed as an interaction card. Using interaction cards, agents can:

- Receive the interaction: accept voice, video, email, chat, and generic interactions with a single click.
- Hold or resume the voice or video interaction: put an active interaction on hold when you must handle another interaction with a higher priority.
- Consult another agent: seek advice about an interaction.
- Transfer the interaction: send the interaction to another agent interaction area.
- Record work codes for reporting: select from the configured work codes to report the type of work done during the interaction.

- Enter disposition codes: select from the configured disposition codes to report the result of the interaction.
- Handle outbound campaign calls: accept an outbound contact and use a campaign script to interact with a customer.

For accessibility purposes, Avaya Workspaces is optimized to conform with both Section 508 and WCAG 2.0 AA standards. Avaya Workspaces provides:

- Access to most content and controls by using the keyboard or mouse.
- Alternative text and labels to assist users with screen-readers.
- A color palette that meets requirements for users with visual impairments.

Agents on Avaya Workspaces can interact with agents on Agent Desktop using features supported on both applications.

Prerequisites

- Ensure that you review the Contact Center Avaya Workspaces installation procedures.
- Supported operating systems:
 - Windows 10 (32-bit and 64-bit)
 - Windows 11 (64-bit)
 - Apple Mac OS 10.11+
- Supported browsers:
 - Google Chrome 79 or above
 - Apple Safari 13 or above
 - Microsoft Edge 79 or above

Terminology differences

Some UI elements of Avaya Workspaces and Agent Desktop have the same functions, but different names.

Agent Desktop	Avaya Workspaces
Activity code	Work code
Closed Reason code	Disposition code
Work item	Interaction
Top bar	Agent toolbar

Table continues...

Avaya Workspaces overview

Agent Desktop	Avaya Workspaces
Work list window	Interaction area
Pane	Widget
Transfer to skillset	Transfer to service
Open Queue contact	Generic Channel interaction

Chapter 4: Avaya Workspaces user interface

Avaya Workspaces field descriptions

Agent toolbar

The agent toolbar provides options for quickly making voice calls, creating emails, viewing interaction logs and notifications, and accessing your address book.

Name	Description
Enter phone number	Used to enter a phone number to make a voice call. You can type digits in the Phone number field and click the Call icon to dial the number. To dial the last dialed number, click the Redial icon. The Enter phone number field is available only to agents with the voice skillset enabled.

Table continues...

Name	Description
Agent name drop-down	<p>Used to access the following options:</p> <ul style="list-style-type: none"> • Start work: To begin work for the day. After clicking Start work you can begin working on interactions. • Exit: To log out and exit Avaya Workspaces. <p>The Exit option is available only after you click Finish Work.</p> <p>The following options are available from the drop-down arrow next to the agent name after clicking Start work:</p> <ul style="list-style-type: none"> • Go Not Ready: To indicate that the agent is not ready to take a call. The options for the not ready state depend on the reason codes configured by your administrator. <p>You cannot choose specific interaction types on which to go not ready.</p> <p>When you change your state to Not Ready, the visual cue below the toolbar changes to yellow.</p> <p>When you change your state to Not Ready while there are active interactions, the status changes to Not Ready Pending.</p> <ul style="list-style-type: none"> • Go Ready: To indicate you are available to receive interactions. <p>The Go Ready option is available only after you click Not Ready. Go Ready is not available after the first login.</p> <p>When you change state from Not Ready to Ready, the yellow line below the toolbar changes to green.</p> <ul style="list-style-type: none"> • Finish Work: To indicate that you have completed work for the day. <p>When you click Finish Work, the visual cue below the toolbar changes to gray.</p>








Icon	Name	Description
	Call	<p>Call the number you provide.</p> <p>The Call icon is available only to agents with the voice skillset enabled.</p>
	Redial	<p>Call the last dialed number.</p> <p>The Redial icon is available only to agents with the voice skillset enabled.</p>
	Request supervisor	<p>Call the supervisor.</p> <p>The Request supervisor icon is available only to agents with the voice skillset enabled.</p>
	Create email	<p>Create an email.</p>

Table continues...

Icon	Name	Description
	Open Interaction Log	View interaction logs. The interaction log displays the last 15 interactions, which includes incoming, outgoing, and missed interactions. Avaya Workspaces provides options for call back and clears these logs when the agent logs out.
	Open Notifications	View Notification logs. Notification logs display the last 15 notifications. Avaya Workspaces clears these notifications after 24 hours.
	Address book	View the address book. The address book displays your team contacts. To view LDAP contacts, use the Phonebook widget.

Interaction area

Interaction area displays all incoming interactions for the agent on any channel, as an Interaction card.















Icon	Name	Description
	Inbound voice interaction	Indicates an inbound voice interaction.
	Inbound video interaction	Indicates an inbound video interaction.
	Inbound generic channel interaction	Indicates an inbound generic channel interaction.
	Outbound voice interaction	Indicates an outbound voice interaction.
	Outbound video interaction	Indicates an outbound video interaction.
	Outbound email interaction	Indicates an outbound email interaction.
	Outbound generic channel interaction	Indicates an outbound generic channel interaction.
	Alerting chat interaction	Indicates an alerting chat interaction.
	Alerting voice interaction	Indicates an alerting voice interaction.
	Alerting video interaction	Indicates an alerting video interaction.
	Alerting email interaction	Indicates an alerting email interaction.
	Alerting generic channel interaction	Indicates an alerting generic channel interaction.
	Chat interaction	Indicates a chat interaction.
	Outbound campaign interaction	Indicates an outbound campaign interaction.

Table continues...

























Icon	Name	Description
	Email interaction	Indicates an email interaction.
	Video interaction	Indicates a video interaction.
	Accept call	Accepts an inbound voice call.
	Accept video call	Accepts an inbound video call.
	Accept interaction	Accepts chat, email, and outbound interactions.
	Hold/Unhold interaction	Pauses or resumes the current interaction. When an active interaction goes on hold, the color of the interaction card changes to blue. When an interaction on hold becomes active, the color of the interaction card changes to green.
	DTMF dial	Provides DTMF key inputs for IVR or voicemail. The DTMF keypad is available for voice interactions.
	More	Provides more options for the interaction. For example, to view more information about the interaction, set an activity or disposition code.
	Send message	Sends a message in a chat or email interaction.
	Work code	Displays the work code set for the interaction.
	Disposition code	Displays the disposition code set for the interaction.
	Auto answer	Displayed on interaction when an interaction is or has been auto-answered.
	Reschedule email	Enables you to postpone work on an email interaction.
	Transfer Complete as transfer	Transfers an active interaction to another agent.
	Toggle video overlay	Toggles video overlay of the agent.
	Hide video	Hides the agent video.
	Consult Complete as consult	Consult with another agent during the interaction.
	Conference	Adds the consulted agent to the interaction and begins a conference between the agent working on the interaction card, the consulted agent, and the customer.

Table continues...

Icon	Name	Description
	Observe	Enables the supervisor to observe an agent's interaction with the customer. This icon is available only for supervisors.
	Stop Observe	Enables the supervisor to stop observing an agent's interaction with the customer. This icon is available only for supervisors.
	Coach	Enables the supervisor to coach an agent. To coach, the supervisor must first observe the interaction. This icon is available only for supervisors.
	Barge in	Enables the supervisor to barge in on an interaction to help close a sale or interact with a customer. To barge in, the supervisor must first start coaching the agent. This icon is available only for supervisors.
	End	Ends a voice or video interaction.
	Close	Closes an interaction.

Navigation menu

Navigation menu provides options according to the type of interaction. You can expand the navigation menu to see the description of the icons when required.


Icon	Name	Description
	Welcome Page	Displays the following widgets: <ul style="list-style-type: none"> • Team: Provides the list of team members and the Search field. • Welcome: Displays the webpage that your administrator configures. <p>The Welcome widget does not support the X-Frame-Options: deny HTML tag.</p>

Table continues...





Icon	Name	Description
	Customer Details	<p>Displays the following widgets during an interaction:</p> <ul style="list-style-type: none"> • Customer Details: Displays the customer contact details such as name, email, company, address, and phone number. • Interaction Details: Displays information about the interaction such as channel type, originating address, and contact ID. <p>The Destination Address field in the Interaction Details widget displays the number the customer dialed. If it is a DN call, the field name is Agent Address.</p> <ul style="list-style-type: none"> • Customer History: Displays information about previous interactions with the customer, including the date and time, status, and channel. All channel types (voice and multimedia) are displayed together in the same list.
	Chat	<p>Displays the following widgets:</p> <ul style="list-style-type: none"> • Chat: Displays messages in the chat interaction. • Suggested Content: Displays frequently used phrases and URLs with information that you can use to process the customer’s request through the chat interaction. <p>You can click the phrases and URLs to add them to the chat. You can click the pencil icon to edit phrases before adding them to the chat interaction.</p> <p>This navigation icon is available only when a chat interaction card is in focus.</p>
	Email	<p>Displays the customer email. This navigation icon is available only when an email interaction is in focus.</p> <p>You can use the following options:</p> <ul style="list-style-type: none"> • Email Templates: Displays prepared response templates that you can use to quickly process the customer’s request through the email interaction. • Suggested Content: Displays frequently-used phrases that you can select in an email. <p>You can use multiple keywords to search for email templates and suggested content.</p>
	Generic Channel	<p>Displays the Generic Channel widget.</p> <p>This navigation icon is available only when a generic channel interaction is in focus.</p>

Table continues...













Icon	Name	Description
	Video	Displays the video widget. This navigation icon is available only when a video interaction is in focus.
	Web Statistics	Displays live skillset-related statistics.
	Screenpop	Displays the Screenpop widget. The Screenpop widget displays external web content that can help an agent to complete the customer interaction. If the external web content is sourced from non-secure sources, the content can be blocked from being displayed in Avaya Workspaces. ! Important: To view content that is sourced from HTTP sources when accessing the client over HTTPS, you must configure your browser to accept non-secure content. To accept non-secure content, click the icon to the right of the address bar. Screenpop can be configured to be available for any interaction type.
	Customer Journey	Provides a graphical representation of the end-to-end journey of the customer in the following views: <ul style="list-style-type: none"> • Default view: Displays one interaction per work request. Each journey element displayed in this view represents an individual interaction with the customer. Click any icon to access the drill-down view for an interaction. • Drill-down view: Displays detailed information, including all status changes, for the selected journey element. All relevant data and links are presented in this view. The most recent information is displayed at the top of the vertical timeline. • Topic view: Displays a filtered view of all elements associated with the selected topic.
	Multimedia Contact Search	Displays the Multimedia Contact Search widget.

Table continues...

Icon	Name	Description
	Customer Search	Displays the following widgets: <ul style="list-style-type: none"> • Customer Search: Provides an option to search for customer details by surname, name, email, phone number, and social handle. • Customer History Search: Displays previous interactions with the customer with the date and time, status, priority, and channel of the customer request. You can search multiple parameters simultaneously.
	Phonebook	Displays the Phonebook widget.
	My Agents	Displays a list of agents in the supervisor's team and information about the agents' state and interactions. This navigation icon is available only for supervisors.
	Preview Outbound	Displays the Preview Outbound widget. This navigation icon is available when an outbound campaign interaction is in focus.
	Observe	Displays the interaction that you are observing.
	Settings	Displays the Settings widget.
	Help	Provides Avaya Workspaces help content.

Avaya Workspaces does not dynamically update the drop-downs within the work card for Services, Work Code, and Disposition Code. Avaya Workspaces populates the list for the agent when the agent accepts an interaction and selects the drop-down. Avaya Workspaces caches this list and updates it if the agent refreshes the browser.

Agent state summary





Agent state summary displays the Agent ID, Station ID, the current state of the agent, and the channels available for interactions. Agent state summary also includes Time in State Timer when enabled.

Text avatars

Avaya Workspaces displays text avatars next to agent names.

The avatar displays the first letter of the agent's first name and last name.

Avaya Workspaces text avatars support Latin characters only. The following table lists some examples:

Agent's name	Text displayed in text avatar
Rose Bolton	 <p>Avaya Workspaces displays the first letter of the agent's:</p> <ul style="list-style-type: none"> • first name • last name
1234	 <p>Avaya Workspaces displays the default avatar.</p>
1Yury1	 <p>Avaya Workspaces displays the first alphabetic character in the name.</p>
1Joe1 2Smith2	 <p>Avaya Workspaces displays the first alphabetic character from the agent's:</p> <ul style="list-style-type: none"> • first name • last name

Widgets displayed for the Home layout by default

By default, Avaya Workspaces displays the following widgets for the Home layout:

- Welcome Page
- Phonebook
- Customer Search

Agents can view and use these widgets even when there is no interaction in focus. If required, your Administrator can add more widgets to the Home layout, for example, Multimedia Contact Search, Web Statistics, and other available widgets.

Widgets displayed for different interaction types

Avaya Workspaces displays different interaction widgets depending on the navigation menu item that you click. When you log in, the system displays the Team and Welcome widgets. The following table lists the default widgets displayed for each type of interaction:

Interaction type	Widgets displayed when you accept the interaction
Voice interaction	<ul style="list-style-type: none"> • Interaction Details • Customer Journey • Screenpop • Phonebook
Video interaction	<ul style="list-style-type: none"> • Interaction Details • Customer Journey • Screenpop • Phonebook
Chat interaction	<ul style="list-style-type: none"> • Chat • Suggested Content • Customer Details • Interaction Details • Customer History • Customer Journey • Screenpop
Email interaction	<ul style="list-style-type: none"> • Email • Email Templates • Suggested Content • Customer Details • Interaction Details • Customer History • Customer Journey • Screenpop
Generic Channel interaction	<ul style="list-style-type: none"> • Interaction Details • Screenpop
Outbound Campaign interaction	<ul style="list-style-type: none"> • Customer Details • Customer History • Interaction Details • Screenpop • Preview Outbound • Customer Journey

Chapter 5: Operation

Logging in to Avaya Workspaces

About this task

Use this procedure to log in to Avaya Workspaces to handle customer interactions.

Change your status to Ready to indicate that you are available to handle all media types for which you are licensed and configured. If you are assigned to a skillset for a particular contact type, you can receive and create contacts in that contact type. Avaya Workspaces displays the icons of the skillsets you are assigned to on the bottom toolbar.

Before you begin

Ensure that you are logged on to the desktop phone before you log in to Avaya Workspaces.

Procedure

1. To access Avaya Workspaces, in your web browser address bar, enter the URL that you received from your supervisor.

Example of the URL to access

Avaya Workspaces: `http://<CLUSTER_VIRTUAL_IP>:31380/services/UnifiedAgentController/workspaces/`.

Example of the URL to access Avaya Workspaces if your Administrator

enables Agent Security: `https://<CLUSTER_VIRTUAL_IP>:31390/services/UnifiedAgentController/workspaces/`.

2. In the **Username** field, type your user name in one of the following formats:

- `domain\username`
- `username@domain`

3. In the **Password** field, type your password.

4. Click **Sign in**.

Avaya Workspaces displays the Activate Agent screen.

5. In the **Profile** field, select the **Home** profile.

6. Click **Activate**.

Avaya Workspaces displays a blank interaction area with the **Start Work** button, and the Team and Welcome widgets.

7. Click **Start Work**, and, from the agent name drop-down list, click **Go Ready** to indicate you are ready to handle customer interactions.

If configured by your administrator, you can go ready automatically after clicking the **Start Work** button.

Logging out of Avaya Workspaces

Before you begin

- Ensure that you do not have an interaction open. If an interaction is open, you must close the interaction before you log out of Avaya Workspaces.

About this task

When you finish work, use the following procedure to log off from Avaya Workspaces.

Procedure

1. In the Avaya Workspaces toolbar, click your name.
2. From the drop down list, click **Finish work**.
3. In the Avaya Workspaces toolbar, click your name and click **Exit** to exit Avaya Workspaces.

The exit screen appears. You are now logged out of Avaya Workspaces.

Using the Welcome widget

About this task

Administrators can configure the Avaya Workspaces welcome widget to open customizable webpage when you start Avaya Workspaces. Agents can use this webpage to perform their work efficiently. For example, the webpage can open the latest sales or marketing campaign that the company is running at that time.

Procedure

Log on to Avaya Workspaces.

The Avaya Workspaces welcome widget appears. You can use the **Open in new window** or **Open in new tab** icons to open the page in a different browser tab or window.

Using the Settings widget

About this task

You can configure your Avaya Workspaces using the Settings widget.


Procedure

1. In the navigation menu, click the **Settings** (⚙️) icon.
The system displays the Settings widget.
2. Select the required tab and configure the settings.
For the detailed description of the tabs see [Variable definitions](#) on page 35.
3. Click **Save**.

Variable definitions

Setting	Description
About	Check version, build and other information about your Avaya Workspaces.
Logs	Use this tab to download the logs or upload the logs to a configured location. See Downloading and uploading the Avaya Workspaces logs on page 53.
General	Use this tab to configure general settings. Select or clear the check boxes next to the following fields: <ul style="list-style-type: none"> • Automatically remove non-numeric characters when pasting into the “Enter Phone Number” field • Show Agent state timer. The agent state timer resets each time the agent changes state.
CRM	Not supported.
Email signature	Use this tab to create a signature for outgoing emails. See Creating an HTML email signature on page 79 and Creating a plain email signature on page 80.

Table continues...

Setting	Description
Audio	<p>Use this tab to change the audio notifications settings. Select or clear the check boxes next to the following fields:</p> <ul style="list-style-type: none"> • Select all • System notifications • Incoming Call notifications • Incoming Video notifications • Incoming Chat notifications • Incoming Email notifications • DTMF
Notifications	<p>Use this tab to change the desktop notification settings. The user can choose which type of notifications they receive when Avaya Workspaces is not in focus or is minimized. Select or clear the check boxes next to the following fields:</p> <ul style="list-style-type: none"> • Alerting Interactions. Select the Alerting Interaction check box if you want a desktop notification to appear when an interaction is alerting on Avaya Workspaces. • Incoming Messages. Select the Incoming Messages check box if you want a desktop notification to appear when you receive messages during an interaction. <p> Note: Google Chrome does not support notifications without HTTPS. To receive notifications, you must allow them in the browser settings.</p>
Language	<p>Use this tab to change the language of your Avaya Workspaces interface. Select the preferred language from the drop-down list.</p>

Using the Customer Details widget

About this task

Verify customer information by reviewing the information that is displayed in the Customer Details widget. You can view customer details, history of recent customer interactions, and interaction details.

*** Note:**

Customer Details is only available on the navigation pane after you accept an interaction.

The Customer Details widget includes the following:

- **Customer Details:** Verify customer contact information, such as the name, email address, and phone number.
- **Customer History:** View information about all previous interactions with the customer.
- **Interaction Details.:** View information about the interaction, such as the date and time, status, and channel used to initiate the interaction.

Procedure

1. Accept an interaction.
2. From the navigation pane, click **Customer Details** (👤).
3. Review the **Customer Details**, **Customer History**, and **Interaction Details** areas to verify customer information.

Changing your status to Ready

About this task

Use this procedure to change your status to Ready after you log on to Avaya Workspaces and are ready to accept interactions.

*** Note:**

When you close or refresh the browser, your status changes to Not Ready. You must change your status to Ready after reconnecting the browser again.

Procedure

1. In the Avaya Workspaces toolbar, click your name.
2. Click **Go Ready**.

The agent status changes to Ready.

Changing your status to Not Ready

About this task

Change your status to Not Ready when you are unavailable to receive interactions. When you change your status to Not Ready, you must select a Not Ready Reason code.

Your supervisor or administrator configures codes for Not Ready Reasons. Administrators define Not Ready Reason codes in Contact Center Manager Server. Not Ready Reason codes can be alphanumeric. Avaya Workspaces displays the Not Ready Reason codes list.

Procedure

1. In the Avaya Workspaces toolbar, click your name.
2. Click **Go Not Ready** and select a code from the drop-down list.

The agent status changes to Not Ready for all contact types.

Changing to Not Ready status when on an interaction

About this task

Change your status to Not Ready while active on an interaction to indicate that you are not ready to accept interactions when the current interaction is complete. When you change your status to Not Ready, you must select a Not Ready Reason code.

Procedure

1. While active on a contact, in the Avaya Workspaces toolbar, click your name.
2. Click **Go Not Ready** and select a code from the drop-down list.

The status changes to Not Ready Pending and Not Ready Pending appears in the toolbar. After you end the interaction your status changes to Not Ready.

Using ACW time to wrap up an interaction

About this task

After completing an interaction, you enter the After Contact Work (ACW) state for a predefined interval. Your administrator configures the ACW time. During ACW time, complete any work required to wrap up the interaction. For example, add notes or dispositions to summarize the interaction.

Procedure

1. In the ACW state, summarize the interaction and complete any remaining work.
2. Close the ACW card or extend ACW time if required.

Entering an activity code

About this task

You can enter one or more activity codes during calls. Activity codes provide a method to track the time that agents spend on various types of calls. For example, you can enter a Sales activity code in Avaya Workspaces during a sales-related call.

Your supervisor or system administrator configures activity codes. Administrators define activity codes in Contact Center Manager Server. Activity codes can be alphanumeric. Avaya Workspaces displays the activity codes list.

Avaya Workspaces displays the **Work Codes** menu on the interaction based on your Contact Center configuration. Administrators can configure activity codes that correspond to a contact type and a skillset.

 **Note:**

Avaya Workspaces refers to activity codes as work codes.

Procedure

1. Select the interaction.
2. Click the **More** (•••) icon.
3. From the **Work Codes** drop-down list, select or type the activity code.

Entering a disposition code

About this task

Use disposition codes to report the outcome of the interaction. You can set a disposition code for every interaction while the interaction is active or immediately after the interaction ends during After Contact Work time. Your supervisor or system administrator configures disposition codes.

 **Note:**

Avaya Workspaces refers to Closed Reason Codes as disposition codes. Disposition codes are not available for voice and video interactions.

Procedure

1. Select the interaction.
2. Click the **More** (•••) icon.
3. Click the **Disposition Codes** menu, select a disposition code.

Creating customer records

About this task

You can create a customer record for a new customer. You can create customer records either using the Customer Details widget when on an interaction with a new customer, or using the Customer Search widget.

Avaya Workspaces allows adding several Email, Telephone and SIP URI fields, but you must select one as the default.

You can apply a restriction flag to a customer when you create a record. For example, add a Restricted flag to indicate to agents not to initiate unsolicited email messages to customers without consent. You can also bar a customer phone number if the customer requests for the Do Not Call (DNC) facility.

Asterisk indicates that the field is mandatory. You can not create a customer record if you leave mandatory fields empty.

Procedure

1. Do one of the following:
 - When on an interaction, in the navigation menu, click the **Customer Details** (👤) icon.
 - In the navigation menu, click the **Customer Search** (🔍) icon.
2. Click the **Create new customer** button.

Avaya Workspaces displays the Customer Information form.
3. In the **Title** field, select a salutary title for the customer.
4. In the **Last Name** field, type the surname of the customer.
5. In the **First Name** field, type the given name for the customer.
6. To apply a restriction flag to this customer, select the **Restricted** check box.
7. In the **Email** field, type an email address for the customer.
8. In the **Type** field, select the type of phone number.
9. In the remaining telephone number boxes, type the international code, area code, and telephone number.
10. In the **URI** field, type the URI of the customer.
11. To add additional Email, Type or URI fields, click **ADD MORE** next to the required field.
12. (Optional) Next to the required phone number, select the **Barred** checkbox to tag the number as barred.
13. Click **Create**.

Avaya Workspaces displays the notification: `Customer is created.`

Adding or editing customer details

About this task

You can add or edit customer details when a change to a customer record is required.

Procedure

1. Do one of the following:
 - When on an interaction, in the navigation menu, click the **Customer Details** (👤) icon. Avaya Workspaces displays the Customer Details widget.
 - Using the Customer Search widget, find the required customer.
For more information, see [Searching for a customer](#) on page 41.
2. To add or edit customer name, click the **Edit** button next to the customer name.
3. To add or edit customer details, select the tab you want to change:
 - Address
 - Telephone
 - Email
 - URI
 - Custom
4. Click the **Edit** button.
5. To add additional Address, Telephone, Email, or URI fields, click the **Add** button.
6. Click **Save**.

Avaya Workspaces displays the notification: `Successfully saved.`

Searching for a customer

About this task

In Avaya Workspaces, you can get details of a customer by searching the customer through the Customer Search widget. You can search by surname, first name, email address and phone number, or using their combination.

Procedure

1. In the navigation menu, click the **Customer Search** (🔍) icon.
Avaya Workspaces displays the Customer Search widget.

2. Click one or several of the following search parameters:

- Surname
- Name
- Email address
- Phone number

The selected parameters turn green and the corresponding input fields appear below.

If you want to remove an input field, click the cross icon on the input field.

3. Enter your inputs in the fields and click **Search**.

Avaya Workspaces displays the search results as a list.

4. From the search result list, select the required customer.

Avaya Workspaces displays the customer details in the left-hand pane and the Customer History Search widget in the right-hand pane.

5. (Optional) To make a call to a customer, next to the customer's name, click the **Dial** (📞) icon.

Searching customer history

About this task



You can search through customer history to find information about previous interactions with the customer. You can access the Customer History Search feature using the Customer Search or Customer Details widgets.

All channel types (voice and multimedia) are displayed together in the same list.

Before you begin

Ensure that you accepted an interaction.

Procedure

1. To open the Customer History Search pane, do one of the following:
 - Using the Customer Search widget, find the required customer and click the **Customer History Search** icon next to the customer's name. For more information, see [Searching for a customer](#) on page 41.
 - From the left navigation pane, click  and then click  in the Customer History area.
2. Expand the **Search by** drop-down list and select one of the following options:
 - **Date**
 - **Phone**

- **Customer Email**
- **Subject**
- **To Address**

Depending on your selection, you see a calendar where you can select a date or a field to enter the customer email, phone number, subject, or To address.

3. Specify the search parameters and click **Search**.

The Customer History Search pane displays the details of the customer interaction that match the search parameters that you provided. You can view the transcripts of conversations by expanding the results, where available.

Supervisors or agents can view the images that are inserted in emails of active email contacts.

4. **(Optional)** To add multiple search parameters, click **Add more search parameters** and repeat steps 2 and 3.

You can search for up to five parameters.

5. **(Optional)** To delete unwanted search parameters, leave the respective input fields empty and click **Search**.

Avaya Workspaces removes the empty search fields.

Using Multimedia Contact Search

About this task

You can search for a multimedia contact using the Multimedia Contact Search widget. You can use one or several search parameters.

If your administrator enables agent skillset partitioning, in search results, Avaya Workspaces displays only contacts that are assigned to your skillsets.

Procedure

1. In the navigation menu, click the **Multimedia Contact Search** (🔍) icon.
Avaya Workspaces displays the Multimedia Contact Search widget.
2. From the dropdown list on the left, select one of the following search parameters:
 - Skillset
 - Status
 - Subject
 - Closed Reason
 - Channel

- Disposition Code
 - Mail To
 - Mail From
 - Arrival Date
 - Last Action
 - Agent
 - ID
 - Closed Date
3. In the box on the right, do one of the following:
 - For **Skillset**, **Status**, **Closed Reason**, **Channel**, **Disposition Code**, **Last Action**, or **Agent**, select the value from the list.
 - For **Subject**, **Mail To**, or **Mail From**, type the data in the field.

If you are not sure about the spelling, you can put an asterisk ("*") before and/or after the entered characters or numbers to indicate that asterisks can be substituted by any characters or numbers. For example, if you search for J_o*, the search results display a list that contains Johns, Johnson, Johnston and so on.
 - For **Arrival Date** or **Closed Date**, specify the time range using the **From** and **To** boxes.
 - For **ID**, enter the number using the arrow buttons in the right part of the box. You can also use up and down arrow keys or numeric keys of your keyboard.
 4. (Optional) If you want to use several search parameters, click **Add more search parameters** and repeat steps 2 and 3.
 5. Click **Search**.

Avaya Workspaces displays the search results as a list.
 6. To view the contact details, click the **Toggle contact details** button.

Avaya Workspaces displays the details of the selected contact.

Pulling a contact

About this task

Pull and open a contact to add or edit information, complete an outbound call, or send a reply to an email message.

You can only pull contacts if you are assigned to a skillset of that contact type. You cannot pull a contact that is currently opened by another agent. Such contacts are only available to view.

Before you begin

- Ensure that your status is set to Not Ready.
- Ensure that no other agent is currently working on the contact.

Procedure

1. In the navigation menu, click the **Multimedia Contact Search** icon.

Avaya Workspaces displays the Multimedia Contact Search widget.

2. To search for a contact, specify the search parameters and click **Search**.

For more information, see [Using Multimedia Contact Search](#) on page 43.

3. Next to the contact you want to pull, click the **Pull Contact** button.

If the Pull Contact button is disabled, it means that another agent is currently working on this contact. You cannot pull such contacts.

4. Click **Yes**.

If you pull a contact that is in the New or Closed state, Avaya Workspaces displays the following confirmation dialog: You are re-opening a closed contact. Are you sure you want to do this? Click **Yes** to continue.

Avaya Workspaces notifies that the contact is pulled and queued to you. Avaya Workspaces automatically changes your status to Ready and accepts the pulled contact.

5. View the contact details and work on the contact.

Closing contacts

About this task

You can close a contact using the Close contacts feature of the Multimedia Contact Search widget. You can also close multiple contacts simultaneously if configured by your administrator. Your administrator can enable the closing of multiple contacts for agents, supervisors, or disable this feature for all types of users.

You can close only Email contacts. You can close contacts only when their status is New or Waiting.

Before you begin

- Ensure that your administrator has enabled the closing of multiple contacts for your user type.
- Ensure that no agent is currently working on any contact that you want to close.

Procedure

1. In the navigation menu, click the **Multimedia Contact Search** (Q) icon.

Avaya Workspaces displays the Multimedia Contact Search widget.

2. Search for Email contacts that you want to close.

For more information about searching multimedia contacts, see [Using Multimedia Contact Search](#) on page 43.

3. Select the check box next to a contact or multiple contacts.
4. Click **Close contacts**.

Avaya Workspaces displays the Close contact details dialog.

5. In the Closed contact details dialog, from the **Closed Reason Codes** list, select the reason for closing a contact or multiple contacts.

If you do not select a Closed Reason Code, Avaya Workspaces automatically applies the Closed Reason Code, which is the first in the list.

6. **(Optional)** In the **Agent Note** field, type your notes.
7. Click **Close**.

Using Web Statistics

About this task

Avaya Workspaces displays live skillset-related statistics. Agents can display assigned skillset statistics in a pie or a bar chart format. Supervisors can display statistics for all skillsets. Web Statistics is available with and without Internet connection.

When you select the skillset to view the statistics, the Web Statistics widget displays the following information:

- Agent chart: shows the proportion of available and not ready agents.
- Contacts chart: shows the proportion of offered and waiting contacts.
- Service Level: represents the current Service Level for the skillset in percentage.
- Max Wait: represents the maximum time (in seconds) the customer has to wait before being connected to an agent.

This procedure describes how to use the Web Statistics widget.

Before you begin

Ensure that your administrator has enabled the Contact Center Web Statistics.

Procedure

1. In the navigation menu, click the **Web Statistics**  icon.

Avaya Workspaces displays the Web Statistics widget with the Skillsets area on the left and the Chart area on the right.

*** Note:**

Your administrator can configure the Web Statistics widget in a different location.

2. To sort the skillsets alphabetically A-Z or reverse Z-A, click the **Sort** button.
3. To view the statistics, from the skillset list, select the required skillset.

The Web Statistics widget displays the chart area showing the statistics.

4. To select the statistics display format, click the **Chart type** button.

You can toggle between bar or pie chart formats.

5. To view the numbers, hover the mouse cursor over the required bar or pie slice.
6. To reload the skillset list, click the **Refresh** button.

Using Phonebook

About this task

Phonebook provides access to contacts in the LDAP directory and custom contacts. You can use the Phonebook widget to perform the following tasks:


- Search for a contact
- Call a contact using the click-to-call feature
- Filter contacts
- Tag a contact
- Add, edit or delete a custom contact
- Configure the display of columns

*** Note:**

The Phonebook widget closes automatically when an incoming interaction arrives.

Use these procedure to access Phonebook.

Procedure


1. In the navigation menu, click the **Phonebook**  icon.
Avaya Workspaces displays the Phonebook widget.
2. To view the contacts, from the drop down list, select **All** and click **Search**.
Avaya Workspaces displays all contacts from Phonebook.

Searching for a contact

About this task

You can use the Phonebook widget to search for a contact.

Procedure

1. In the navigation menu, click the **Phonebook** () icon.
Avaya Workspaces displays the Phonebook widget.
2. From the drop down list, select the type of the contact you want to search for:
 - All
 - Custom Contacts
 - Favorite
 - Speed Dial
3. To specify the search details, from the drop down list, select one of the following:
 - Display Name
 - Surname
 - First Name
 - Phone
 - Mobile
 - IP Phone
 - Other Phone
 - Email
 - Department
 - Street
 - City
 - State
 - Postal Code
4. In the **Narrow Search...** field, type the required details.
5. Click **Search**.


Avaya Workspaces displays the search results. The contacts from the Favorite and Speed Dial lists are tagged with the corresponding icons.

Calling a contact

About this task

In the Phonebook widget, you can make a call using the click-to-call feature.

Procedure

1. In the navigation menu, click the **Phonebook** () icon.
Avaya Workspaces displays the Phonebook widget.

2. Search for a contact you want to call.

For more information, see [Searching for a contact](#) on page 47.

3. Next to the required contact, click the **Dial** (📞) icon.

*** Note:**

The Dial icon appears only if you have voice capabilities, and the contact has an associated phone number.

Filtering contacts

About this task

The LDAP directory contains a lot of contacts. You can use Phonebook to filter contacts in the LDAP directory. You can filter by three types of contacts:

- Custom Contacts
- Favorite
- Speed Dial

Procedure

1. In the navigation menu, click the **Phonebook** (👤) icon.

Avaya Workspaces displays the Phonebook widget.

2. From the drop down list, select the type of contact based on which you want to filter the contacts:

- Custom Contacts
- Favorite
- Speed Dial

3. Click **Search**.

Avaya Workspaces displays the search results.

Tagging a contact

About this task

You can tag a contact in Phonebook as Favorite or Speed Dial. Use tagged contacts to filter and search for contacts effectively. Administrators set the maximum number of contacts that you can add as favorites or add to the speed dial list.

Procedure

1. In the navigation menu, click the **Phonebook** (👤) icon.

Avaya Workspaces displays the Phonebook widget.

2. Search for a contact you want to tag.

For more information, see [Searching for a contact](#) on page 47.

3. Next to the contact, click the **Favorite** or **Speed Dial** icon.


The selected icon turns gray. If you want to add the contact to both Favorite and Speed Dial lists, you can click both icons.

Adding a custom contact

About this task

You can add a custom contact using the Phonebook widget. Custom contacts are contacts that you require, which are not present in the LDAP directory. The number of contact that you can add to Phonebook depends on the number that administrators configure.

Procedure

1. In the navigation menu, click the **Phonebook**  icon.
Avaya Workspaces displays the Phonebook widget.
2. Click **New Contact**.
Avaya Workspaces displays the new contact form.
3. Enter the details for the new contact.
The Display Name field is mandatory.
4. (Optional) To tag the new contact as favorite, select the **Favorite** check box.
5. (Optional) To add the new contact to the speed dial list, select the **Speed Dial** check box.
6. Click **Save**.

Result


The new contact is now available in Phonebook.

Editing a custom contact

About this task

You can edit only contacts from the Custom Contacts list.

Procedure

1. In the navigation menu, click the **Phonebook**  icon.
Avaya Workspaces displays the Phonebook widget.
2. From the drop down list, select **Custom Contacts** and click **Search**.
Avaya Workspaces displays the list of Custom Contacts.
3. Next to the required contact, click the **Edit Contact** icon.
Avaya Workspaces displays the Edit Contact form.
4. Update the details that you need to change.

5. Click **Save**.

Deleting a custom contact

About this task

You can delete contacts only from the Custom Contacts list.

Procedure

1. In the navigation menu, click the **Phonebook** (👤) icon.
Avaya Workspaces displays the Phonebook widget.
2. From the drop down list, select **Custom Contacts** and click **Search**.
Avaya Workspaces displays the list of Custom Contacts.
3. Next to the required contact, click the **Delete Contact** icon.
Avaya Workspaces displays the Delete dialog box.
4. To confirm the deletion, click **Yes**.

Configuring the display of columns

About this task

You can configure the display of your Phonebook by selecting the columns that you want to display in the Phonebook grid. You can order and sort the columns. You can also decide how many records you want to view per page in the phonebook.

Procedure

1. In the navigation menu, click the **Phonebook** (👤) icon.
Avaya Workspaces displays the Phonebook widget.
2. Click **Setup columns**.
Avaya Workspaces displays the Column configurator window. The Available list box contains all available column titles. The Displayed list box contains the column titles that Phonebook currently displays.
3. To add a column to the Phonebook grid, in the **Available** list box, select the column title.
4. Click **Add >**.
The selected column title moves to the Displayed list box.
5. To remove a column from the Phonebook grid, in the **Displayed** list box, select the column title.
6. Click **< Remove**.
The selected column title moves to the Available list box.

7. To arrange the columns in the Phonebook grid, in the **Displayed** list box, select the column title and click **Move Up** or **Move Down** .
8. To add all columns to the Phonebook grid, click **Add all >>**.
9. To remove all columns from the Phonebook grid, click **<< Remove all**.
10. Click **Save**.
Avaya Workspaces saves the settings and displays the Phonebook grid based on your settings.
11. To sort the columns in the Phonebook grid,click the column heading.
For example, if you click the Display Name column header, Avaya Workspaces sorts the contacts alphabetically according to the display name.
12. To configure the number of rows per page, from the **Rows per page** drop down list, select the required number.
13. To navigate through the pages of Phonebook, do one of the following:
 - Click the arrows on the bottom of the Phonebook grid to move to the next or previous page.
 - From the **Page** drop down list, select the number of the page you want to move to.

Calling your supervisor

About this task

Use this procedure to call your supervisor, either while idle or while on a customer call.

If you call your supervisor while on a customer call, the current call is automatically placed on hold and Avaya Workspaces initiates a new unrelated call to your supervisor. You cannot conference or join these two calls.

Note:

The calling a supervisor option is available only for agents with voice skillset enabled.

Procedure

On the Agent toolbar, click the **Request Supervisor** () icon.

Avaya Workspaces makes an outbound voice call to the supervisor, and the supervisor is alerted.

Downloading and uploading the Avaya Workspaces logs

About this task

Avaya Workspaces assists support staff by gathering all logs and allowing you to download the logs or upload the logs to a configured location.

Procedure

1. Log in to Avaya Workspaces.
2. In the navigation menu, click the **Settings** (⚙️) icon.
The system displays the Settings widget.
3. Click the **LOGS** tab.
4. Select the time period for which you want to view logs.
5. Click one of the following:
 - **DOWNLOAD**: The system downloads a .zip file with the log files for Avaya Workspaces to the Downloads folder in your browser. You can then share or send an email with the logs to your Supervisor or support personnel.
 - **UPLOAD**: The system automatically uploads a .zip file with the logs for Avaya Workspaces to a pre-configured central storage location set by your administrator. Note the date and time when you click **UPLOAD**. You must share the date and time of the upload with your Supervisor or support personnel so that they can identify and retrieve the logs.

Accessing online help

About this task

Access online help when you need immediate help to perform tasks.

Procedure

On the Avaya Workspaces navigation menu, click the **Help** (❓) icon .

Keyboard shortcuts

Shortcut key	Description
Ctrl + Shift + /	Show or hide the list of shortcut keys
Ctrl + [Cycle backward through Workspaces focus areas

Table continues...

Shortcut key	Description
Ctrl +]	Cycle forward through Workspaces focus areas
Ctrl + Alt + ,	Open Settings Page
Ctrl + Alt + .	Open Help Page
Ctrl + Alt + l	Finish work
Ctrl+ Alt + k	Start Work
Ctrl + Alt + o	Go Ready
Ctrl + Alt + p	Go Not Ready
Ctrl + Alt + x	Exit or sign out
Ctrl + Alt + a	Open Address Book
Ctrl + b	Accept an interaction
Alt + x	Close an interaction
Ctrl + Shift + h	Hold or unhold an interaction
Ctrl + Alt + t	Display the menu for transfer from the interaction card
Ctrl + Shift + m	Display the menu for more options from the interaction card
Alt + v	Display the menu for dial pad from the interaction card
Alt + c	Display the menu for consult from the interaction card
Alt + g	Complete the consultation as a conference
Alt + j	Extend ACW
Alt + z	Complete ACW
Ctrl + Alt + 1	Select the previous widget
Ctrl + Alt + 2	Select the next widget
Ctrl + q	Select the previous item on the left sidebar
Ctrl + j	Select the next item on the left sidebar
Ctrl then .	Select the next interaction card that can be focused
Ctrl then ,	Select the previous interaction card that can be focused

Avaya Workspaces behavior when the internet connection is lost

If the internet connection is lost, Avaya Workspaces changes the status of all agents to Not Ready with the Reason code 000. Depending on whether an agent has active interactions, the following occurs:

- If an agent has no active interactions, after one minute of disconnect, Avaya Workspaces automatically logs out the agent. When the internet connection is restored, the agent must log in again.

- If an agent has active interactions, Avaya Workspaces displays a notification about connectivity issues and keeps the agent logged in. When the internet connection is restored, the agent must manually change their status to Ready and continue working on the same interaction.

Chapter 6: Voice interactions

Use Avaya Workspaces to perform the following tasks when you handle a voice interaction:

- Accept and decline incoming calls
- Enter an Activity code
- Place calls on and off hold
- Transfer a call to another party
- Conference a call
- End a call
- Call a supervisor
- Make a call
- Enter DTMF Digits

Avaya recommends that you use Avaya Workspaces to perform all telephony tasks, such as logging on or off, changing your status to Ready or Not Ready, accepting or rejecting a call, placing a customer on hold, transferring a customer, calling a supervisor, and releasing a call.

Important:

You must not use your desktop phone or Avaya Workspaces to make a call, transfer a call, or conference a call to a phone number that is:

- routed to a CDN (Route Point).
- converted to a CDN (Route Point). For example, when using digit manipulation on the call server.
- call forwarded to a CDN (Route Point).

You can use your desktop phone or Avaya Workspaces to make calls, transfer a call, or conference directly to a CDN (Route Point).

Desktop phone behavior

Agents using Avaya Workspaces to handle voice contacts can also have a desktop phone at their workstation. The desktop phone displays information when a call presents to the agent. Typically, this information includes:

- The Contact Center CDN number as the calling party.
- The name of the skillset that queued the call.

Accepting a call

Before you begin

- Ensure that your status is **Ready**.
- Ensure that you are assigned to a skillset for handling voice interactions.

About this task

Accept and work with voice interactions. The relevant interaction controls become active and the call timer appears on the interaction.

If your administrator has configured your Contact Center to run in the Call Force Delay mode, you must handle all contacts presented to you.

Procedure

On the new alerting interaction, click **Accept** (👉).

Declining a call

Before you begin

- Ensure that you have a skillset designated to handle voice interactions.

About this task

Decline a call if you want to reject the contact and place the contact back in the queue. The contact is then queued to another agent and your status becomes Not Ready. You cannot receive new incoming interactions until you change your status to Ready.

Procedure

On the Avaya Workspaces, select the new interaction and click **Reject**.

Placing a call on hold

About this task

Place a call on hold to interrupt your current call. When you want to speak to the caller again, release the call from hold.

Procedure

1. Select the interaction.
2. Click the **Hold** (||) icon.

The color of the interaction card changes to blue.

Taking a call off hold

About this task

Take a call off hold when you want to speak to the caller again.

Procedure

1. Select the interaction.
2. Click the **Unhold** (||) icon.

The call is taken off hold, and the color of the interaction card changes to green.

Transferring a call

About this task

You can transfer a voice interaction to another agent using a supervised transfer. In a supervised transfer, you must speak to the third party before transferring a call.

Procedure

1. On the interaction, click the **Transfer** (↔) icon.
2. Do one of the following:
 - In the **Enter Extension** field, type the extension to which you want to transfer the interaction and click the **Transfer Call** icon.
 - From the **Team** or **Phonebook** (👤) widgets, search for the contact, to which you want to transfer the interaction, and click the **Transfer** (↔) icon next to it.
3. Avaya Workspaces displays a new interaction card joined to the existing interaction card with options to hold or to complete the transfer.
4. On the new interaction card, click the **Complete as Transfer** (↔) icon to transfer the call.
Avaya Workspaces transfers the call to the third party and both interaction cards disappear

Consulting another agent or supervisor

About this task

Use this procedure to add another agent or supervisor to the interaction.

When you consult another party, Avaya Workspaces places the interaction with the customer on hold. After you speak to the other party, you can resume the conversation.

Procedure

1. On the interaction, click the **Consult** (👤) icon to place the customer on hold.
2. Do one of the following:
 - In the **Enter Extension** field, type the extension to which you want to transfer the interaction and click the **Consult** (👤) icon.
 - From the **Team** or **Phonebook** (👤) widgets, search for the contact, to which you want to transfer the interaction, and click the **Consult** (👤) icon next to it.
3. Avaya Workspaces makes an outbound voice call to the extension that you provided.
Avaya Workspaces displays a new interaction card joined to the existing interaction card with options to hold or to complete the call.
4. Speak with the other party.
5. Click **Complete as Conference** to take the customer off hold and conference in the customer and the other party.

Using the Co-Browsing feature

About this task

With the Co-Browsing feature, the agent and customer can browse the same webpage simultaneously. You can either initiate a new co-browsing session, or join the one initiated by the customer. This feature is available for Chat and Voice interactions. You can access the Co-Browsing feature using the Screenpop icon in the navigation menu.

Procedure

1. When on an interaction, share with the customer the URL of the webpage for co-browsing.
2. In the navigation menu, click the **Screenpop** (🔗) icon.
3. Select the **Co-Browse** tab.
Avaya Workspaces displays the Avaya Web Co-Browsing page.
4. Do one of the following:
 - **Start New Session:** enter your name, click **Create Session**, share the generated Session Key with the customer and click **Join**.
 - **Join Live Session:** enter your name, enter the Session Key shared by the customer and click **Join Session**.

The customer gets a message indicating that the Co-Browsing session is in progress with options to **Pause** or **Stop** the session.

You can now see the customer's screen and assist with the customer's query.

5. To request control of the Co-Browsing session, click the **Request Control** icon.

The customer gets a notification indicating that you requested control of the customer's webpage. The customer gets options to **Grant** or **Deny** permission to access the customer's webpage.

If the customer grants control, you can enter data in the customer's webpage. During this time, customer gets an option to **Revoke** permissions if required. If the customer denies or revokes permissions for controlling the webpage, you cannot control the customer's webpage.

6. To release control of the Co-Browsing session, click the **Release Control** icon.

7. To end the Co-Browsing session, click the **Close (X)** icon.

The customer gets a message indicating that the agent closed the Co-Browsing session.

Ending a call

About this task

End a call when a call is completed. If your status was Ready before the call, your status is automatically set to Ready, when you end the call.

Procedure

On the interaction, click the **End (↩)** icon.

Making a call

About this task

Make a call using Avaya Workspaces.

Procedure

Make a voice call using one of the following options:

- In the **Enter phone number** field, type a phone number or contact name. Click the **Call (📞)** icon.
- Click the **Redial (↺)** icon to dial the last dialed number.

Using DTMF digits

About this task

Use the DTMF feature if you need to navigate through a Contact Center menu or dial numbers to access voice messages during a call.

Procedure

1. On the interaction, click the **DTMF (#)** icon.
2. Enter the numbers on the keypad that appears.

Making a call while on an existing voice call

About this task

Make a new voice call while you already have an existing voice call on Avaya Workspaces. The existing interaction is automatically put on hold. You can work on one voice call at a time; the other calls are placed on hold.

Procedure

In the **Enter phone number** field, type a phone number or contact name and click the **Call** (📞) icon.

The phone number is dialed. A new interaction is added to the work list and the call timer on the interaction starts to increment. After the second call or optionally a third call is originated, each interaction appears on Avaya Workspaces individually. Avaya Workspaces automatically puts the existing calls on hold.

Accepting an inbound voice call while on an existing skillset voice call

About this task

Accept and work with a second voice call. The relevant interaction controls become active and the call timer appears on the interaction.

Procedure

Select the new alerting interaction and click the **Accept** (✓) icon.

The existing interaction is automatically put on hold. You can work on one voice call at a time; the other calls are placed on hold.

Chapter 7: Video interactions

You can watch video calls on Avaya Workplace Client or Avaya Vantage™, however you need Avaya Workspaces to control them. This chapter describes how to use Avaya Workspaces to handle video interactions.

Handling video interactions is a licensed feature with per seat agent licensing. Agent must be configured with the video contact type and a video skillset.

Use Avaya Workspaces to perform the following tasks when you handle a video interaction:

- Accept and decline incoming video calls
- Enter an Activity code
- Place video calls on and off hold
- Transfer a video call to another party
- End a video call
- Enter DTMF Digits

 **Note:**

The conference functionality is not available for video calls, however the **Consult** button is enabled. Do not use the **Consult** button to initiate a conference while working with video interactions.

When working with video interactions, you must use Avaya Workspaces to perform all tasks, such as logging on or off, changing your status to Ready or Not Ready, accepting or rejecting a call, placing a customer on hold, transferring a customer, calling a supervisor, and releasing a call.

 **Important:**

You must not use Avaya Workspaces to phone, transfer a call, or conference a call to a phone number that is:

- routed to a CDN (Route Point).
- converted to a CDN (Route Point). For example, when using digit manipulation on the call server.
- call forwarded to a CDN (Route Point).

You can use Avaya Workspaces to transfer a video call or phone directly to a CDN (Route Point).

Desktop phone behavior

Agents using Avaya Workspaces to handle video contacts can also have a desktop phone at their workstation. The desktop phone displays information when a call presents to the agent. Typically, this information includes:

- The Contact Center CDN number as the calling party.
- The name of the skillset that queued the call.
- Displays the video call.

Accepting a video call

Before you begin

- Ensure that your status is **Ready**.
- Ensure that you are assigned to a skillset for handling video interactions.

About this task

Accept and work with video interactions. The relevant interaction controls become active and the call timer appears on the interaction.

If your administrator has configured your Contact Center to run in the Call Force Delay mode, you must handle all contacts presented to you.

Procedure

On the new alerting interaction, click **Accept** (■).

Declining a video call

Before you begin

- Ensure that you have a skillset designated to handle video interactions.

About this task

Decline a call if you want to reject the contact and place the contact back in the queue. The contact is then queued to another agent and your status becomes Not Ready. You cannot receive new incoming interactions until you change your status to Ready.

Procedure

On the Avaya Workspaces, select the new interaction and click **Reject**.

Placing a video call on hold

About this task

Place a video call on hold to interrupt your current call. When you want to speak to the caller again, release the video call from hold.

Procedure

1. Select the interaction.
2. Click the **Hold** (||) icon.

The color of the interaction card changes to blue.

Taking a video call off hold

About this task

Take a video call off hold when you want to speak to the caller again.

Procedure

1. Select the interaction.
2. Click the **Unhold** (||) icon.

The video call is taken off hold, and the color of the interaction card changes to green.

Transferring a video call

About this task

You can transfer a video interaction to another agent using a supervised transfer. In a supervised transfer, you must speak to the third party before transferring the video call.

Note:

If you are transferring a video call to a voice mail system, you must ensure that the correct DTMF tones are transferred to the voice mail system.

Procedure

1. On the interaction, click the **Transfer** (↔) icon.
2. Do one of the following:
 - In the **Enter Extension** field, type the extension to which you want to transfer the interaction and click the **Transfer Call** icon.

- From the **Team** or **Phonebook** (👤) widgets, search for the contact, to which you want to transfer the interaction, and click the **Transfer** (↔) icon next to it.
3. Avaya Workspaces displays a new interaction card joined to the existing interaction card with options to hold or to complete the transfer.
 4. On the new interaction card, click the **Complete as Transfer** (↔) icon to transfer the video call.

The video call is transferred to the third party and both interaction cards disappear on Avaya Workspaces.

Consulting another agent or supervisor

About this task

Use this procedure to consult with another agent or supervisor on the interaction.

When you consult another party, Avaya Workspaces places the interaction with the customer on hold. After you speak to the other party, you can resume the conversation.

Procedure

1. On the interaction, click the **Consult** (👤) icon to place the customer on hold.
2. Do one of the following:
 - In the **Enter Extension** field, type the extension to which you want to transfer the interaction and click the **Consult** (👤) icon.
 - From the **Team** or **Phonebook** (👤) widgets, search for the contact, to which you want to transfer the interaction, and click the **Consult** (👤) icon next to it.
3. Avaya Workspaces makes an outbound call to the extension that you provided.

Avaya Workspaces displays a new interaction card joined to the existing interaction card.
4. Speak with the other party.

Ending a video call

About this task

End a video call when a video call is completed. If your status was Ready before the video call, your status is automatically set to Ready, when you end the video call.

Procedure

On the interaction, click the **End** (🔒) icon.

Using DTMF digits

About this task

Use the DTMF feature if you need to navigate through a Contact Center menu or dial numbers to access voice messages during a call.

Procedure

1. On the interaction, click the **DTMF (#)** icon.
2. Enter the numbers on the keypad that appears.

Making a call while on an existing video call

About this task

Make a new voice call while you already have an existing video call on Avaya Workspaces. The existing interaction is automatically put on hold. You can work on one voice call at a time; the other calls are placed on hold.

Procedure

In the **Enter phone number** field, type a phone number or contact name and click the **Call** (📞) icon.

The phone number is dialed. A new interaction is added to the work list and the call timer on the interaction starts to increment. After the second call or optionally a third call is originated, each interaction appears on Avaya Workspaces individually. Avaya Workspaces automatically puts the existing calls on hold.

Chapter 8: Chat interactions

Contact Center provides two services for web chat: Web Communications text chat and Enterprise Web Chat (EWC). Avaya Workspaces supports EWC only. EWC is a licensed feature.

This chapter describes how to handle chat interactions in Avaya Workspaces. During a chat interaction, you communicate directly with customers in real time over the internet. You can perform the following tasks:

- Accept or decline an incoming chat interaction
- Review customer information
- Send an automated response
- Push a URL
- Transfer a chat interaction
- Consult with another agent
- End a chat interaction

A customer can request a chat session by clicking the **Live Chat** icon on the website. The customer is presented with a form to fill in and select the appropriate skillset, subject, and objective for their chat session. The customer is then placed into web-on-hold, or a similar treatment configured in your Contact Center, while waiting for an agent to accept their chat request.

After you accept the interaction, the Chat widget is displayed. The Chat widget contains two widgets: Chat and Suggested content. The Chat Widget displays a complete record of the conversation as well as any URLs that you preview or push to the customer. When an interaction is active, you can also use the Customer Details widget to view customer information, the most recent message sent by the customer, whether the customer's browser is still connected to the session, and whether the customer is currently typing a message. For more information about the Customer Details widget, see [Using the Customer Details widget](#) on page 36.

If the customer sends a message and you do not respond within the configured time, Avaya Workspaces automatically sends a message to the customer indicating that you are working on their request.

If you manually scroll up in the chat interaction, and a new message arrives, the window does not automatically scroll to the bottom. Instead, the interaction shows a New Message indicator. You can then click the New Message indicator or use the scroll bar to move to the latest message received.

Accepting a chat interaction

Before you begin

- Ensure that your status is set to Ready.
- Ensure that you are assigned to a skillset for handling chat interactions.

About this task

Accept a chat interaction to communicate privately with a customer in real time over the Internet.

Procedure

On the interaction, click **Accept** (✓).

Note:

Your site administrator configures the maximum number of additional interactions you can manage.

Declining a chat interaction

About this task

Decline a chat interaction when you are not available to chat with a customer and you want to return the interaction to the queue.

Procedure

On the interaction, click **Reject**.

The interaction returns to the queue and into Web-on-hold. Your status is set to Not Ready.

Sending a chat message

About this task

Send a chat message to communicate privately with a customer in real time over the Internet.

Procedure

1. Type the message.
2. Click the **Send message** ( icon or press the **Enter** key.

Using the Suggested Content widget


About this task

You can use the Suggested Content widget to send an automatic phrase or a URL to a customer. You can also edit a suggested phrase before you send it to a customer.

Note:

The suggested content must be set by your administrator.

Procedure


1. When on a chat interaction, click the phrase on the Suggested Content widget.
The system sends the suggested phrase to a customer.
2. To modify a suggested phrase, do the following:
 - a. Click the **Edit Suggestion** icon next to a suggested phrase.
The system displays the phrase in the **Type a message** field.
 - b. Edit the phrase and click **Send message** (.
3. To use a URL from the Suggested Content widget in the chat, click the URLs tab, and click the URL to add to the chat.

Using the Co-Browsing feature

About this task

With the Co-Browsing feature, the agent and customer can browse the same webpage simultaneously. You can either initiate a new co-browsing session, or join the one initiated by the customer. This feature is available for Chat and Voice interactions. You can access the Co-Browsing feature using the Screenpop icon in the navigation menu.

Procedure

1. When on an interaction, share with the customer the URL of the webpage for co-browsing.
2. In the navigation menu, click the **Screenpop** () icon.
3. Select the **Co-Browse** tab.
Avaya Workspaces displays the Avaya Web Co-Browsing page.
4. Do one of the following:
 - **Start New Session:** enter your name, click **Create Session**, share the generated Session Key with the customer and click **Join**.
 - **Join Live Session:** enter your name, enter the Session Key shared by the customer and click **Join Session**.

The customer gets a message indicating that the Co-Browsing session is in progress with options to **Pause** or **Stop** the session.

You can now see the customer's screen and assist with the customer's query.

5. To request control of the Co-Browsing session, click the **Request Control** icon.

The customer gets a notification indicating that you requested control of the customer's webpage. The customer gets options to **Grant** or **Deny** permission to access the customer's webpage.

If the customer grants control, you can enter data in the customer's webpage. During this time, customer gets an option to **Revoke** permissions if required. If the customer denies or revokes permissions for controlling the webpage, you cannot control the customer's webpage.

6. To release control of the Co-Browsing session, click the **Release Control** icon.
7. To end the Co-Browsing session, click the **Close (X)** icon.

The customer gets a message indicating that the agent closed the Co-Browsing session.

Transferring a chat interaction to a skillset

About this task

You can transfer a chat interaction to a skillset. This is a blind transfer.


The agent who answers the transferred interaction sees the existing chat conversation between the customer and the previous agent.

If your administrator applied agent skillset partitioning to transfers, you can transfer interactions only to the skillsets assigned to you.

Important:

Transfer to a skillset is a single-step transfer. After you select the skillset to which you want to transfer, you are dropped from the interaction. You cannot transfer an interaction to a skillset that does not have active agents.

Procedure

1. On the chat interaction, click **Transfer** (.
2. From the **Services** list, select the skillset to transfer the chat interaction to.

Avaya Workspaces queues the interaction to the selected skillset.


Consulting with another agent during a chat interaction

About this task

You can consult with another agent during a chat interaction. You can only consult with an agent who is logged in to Avaya Workspaces.

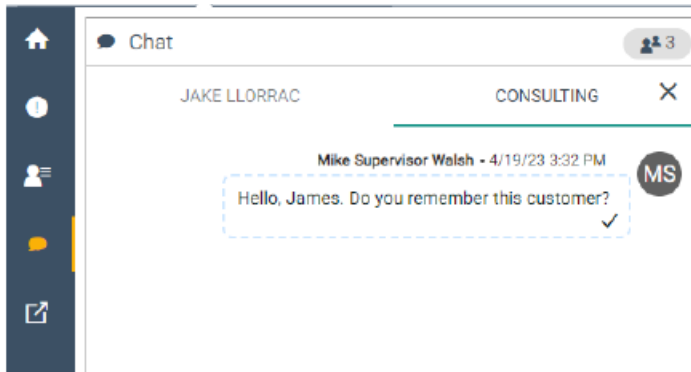
During a consultation, you see your chat with the customer in one tab and a second Consulting tab. Use the Consulting tab to whisper private messages to the other agent. The other agent can see your conversation with the customer but cannot send messages to the customer. If the other agent agrees, you can transfer the chat to them or initiate a conference.



Procedure

1. During a chat interaction, click  to start a consultation.
2. Search for the agent you want to consult in the **Team** or **Users** list.
3. Use the Consulting tab to whisper private messages to the other agent.

During the consultation, get the information you need from the other agent. You can also request permission to transfer the interaction or start a conference.

A separate tab displays your conversation with the customer.



4. From the interaction card, do one of the following to complete the consultation:
 - If you no longer require assistance from the other agent, click **X** on the Consulting tab to end the consultation.
 - If the agent agrees, click  on the interaction card to transfer the interaction.
 - If the agent agrees, click  on the interaction card to start a three-way chat conference between you, the other agent, and the customer.

Completing the chat interaction

About this task

Close the chat interaction when it is complete. The chat history is saved automatically.

Procedure

1. Click **☰** > **Disposition Codes** and then select one of the available disposition codes that best describes the outcome of the interaction.
2. Click **✖** to complete the interaction.

Chapter 9: Email interactions

You can perform the following email management tasks in Avaya Workspaces:

- Create a new email message
- Accept or decline an incoming email interaction
- Review and update customer information
- Reschedule or postpone work on an email
- Reply to an email
- Add attachments
- Use email templates and other suggested content to save time
- Insert an email signature
- Transfer or forward an email interaction
- End an email interaction

Accepting an incoming email interaction

About this task

Accept an incoming email interaction, when you are ready to receive the customer's email and begin an interaction with a customer. Avaya Workspaces displays the Email widget. The new incoming email interaction appears in the interaction area.

Note:

If an incoming email contains inline images, Avaya Workspaces displays them as attachments.

Procedure

On the Avaya Workspaces, click **Accept** (✓).

The email message opens in the Email widget.

Declining an incoming email interaction

About this task

Decline an incoming email interaction if you cannot handle the email message. The new incoming email interaction disappears from the interaction area.

Procedure

On Avaya Workspaces, click **Reject**.


The interaction returns to the queue.

Rescheduling work on an email

About this task

You can postpone work on an email interaction if you need more time to complete it. For example, you might need to gather more information before replying to an email.

Procedure

1. On the email interaction card, click .
2. Enter the time in the hh:mm time format.
For example, if you want to work on the interaction at 3:25 p.m., enter 15:25.
3. Enter the date in the mm/dd/yyyy format.
You can enter today's date or a future date. If you enter today's date, you must select a future time.
4. **(Optional)** Type a note with additional information, such as the reason you are postponing work on the email.
5. Click **Reschedule** to finish rescheduling the email.

Result

The email interaction opens at the scheduled time so you can finish working on it.

Replying to an email interaction

About this task

When a customer sends an email message, reply to the email interaction. Create a response in the same format as the original request.

When creating your email response, you can do the following:

- Use email templates
- Add suggested responses
- Insert a signature
- Attach files

+ Tip:

You can use multiple keywords to search for email templates and suggested content.

Procedure

1. To reply to the email, click **Reply**.
2. **(Optional)** Type additional email addresses in the **To** and **Cc** fields if you want to include other people in the reply.
3. **(Optional)** To add email recipients who are not visible to others, click **Add Bcc** and type an email address in the **Bcc** field.
4. **(Optional)** In the **Subject** box, edit the subject if required.
5. In the message body, type a response to the customer query.

You can edit your message using the editing tools described in [Email editing tools](#) on page 76.

6. **(Optional)** To use an email template in your response, select the template from the Email Templates widget and then click **Insert**.

You can edit the template content that is added to the email body.

7. **(Optional)** Use the Suggested Content widget to select a frequently-used phrase.

You can edit the text if required.

8. To add an attachment, click **Attach File**.

After you attach a file, Avaya Workspaces displays the name of the attached file in the Uploaded attachments section.

9. To add a signature, click **Insert Signature**.

If no email signatures are available, this field is disabled. For information about creating an email signature, see [Creating an HTML email signature](#) on page 79 and [Creating a plain email signature](#) on page 80.











10. **(Optional)** Review the following additional information, which you can access from the navigation pane on the left side of the screen:

- **Customer Details** (👤): To view information about the customer, including customer history.
- **Screenpop** (🔗): To access preconfigured external web content.
- **Customer Journey** (📊): To view a graphical representation of the end-to-end journey of the customer.

11. Click **⋮** to access additional interaction details.
12. When you are ready to send your response, click **Send**.
13. Close the interaction.

If required, select a disposition code for the interaction.

Email editing tools

Icon	Description
B	Makes the font bold.
<i>I</i>	Makes the font italic.
<u>U</u>	Underlines the text.
Aa	Changes the font size. You can choose from small, normal, large or huge font sizes.
	Inserts a numbered list in the text.
	Inserts a bullet list in the text.
	Transforms the text into a quote.
	Inserts a link in the text.
	Aligns the text left.
	Centers the text.
	Aligns the text right.
	Cancel the last action.
	Restores the last action.
	Inserts an image to the email body or signature.

Creating an email message

About this task

You can create a new email message to send to a customer. While creating the email, you can do the following:

- Use email templates
- Add suggested responses
- Insert a signature
- Attach files

 **Tip:**

You can use multiple keywords to search for email templates and suggested content.

Before you begin

Ensure that you are assigned to an email skillset.

Procedure

1. On the Agent toolbar, click the **Create Email** (✉) icon.
Avaya Workspaces displays the Email widget.
2. In the **From** field, select the appropriate skillset from the list.
The list displays only skillsets assigned to you.
3. In the **To** field, type the email address to which you want to send the email.
4. **(Optional)** Click **Add Bcc** if you want to add recipients who are not visible to others in the **Bcc** field.
5. **(Optional)** In the **Cc** and **Bcc** fields, type additional email addresses.
6. In the **Subject** field, type the subject of your message.
7. In the message body, type the text of your message.
You can edit your message using the editing tools described in [Email editing tools](#) on page 76.
8. To add an attachment, click **Attach File**.
9. **(Optional)** To use an email template, select the template from the Email Templates widget and then click **Insert**.
You can edit the template content that is added to the email body.
10. **(Optional)** Use the Suggested Content widget to select a frequently-used phrase.
You can edit the text if required.
11. Click **Insert signature** to insert an email signature.
If no email signatures are available, this field is disabled.
If configured, Avaya Workspaces automatically inserts the signature.
12. Click **Send**.
Avaya Workspaces searches the database for the customer's email address. If the customer does not exist in the database, a new customer record is created.
Avaya Workspaces closes the interaction.

Uploading images to the email image pool

About this task

You can upload one or more images to the email image pool. Insert these images into the email signature or email body. You can change the image pool content by removing existing images and uploading new ones.

You can upload a limited number of images of a limited size to the image pool. The administrator configures the maximum number and the maximum size of the images that you can upload to the image pool. Contact your system administrator to learn the limits.

Procedure

1. Access the image pool dialog by doing one of the following:
 - On the Settings widget, on the Email Signature tab, click the **Insert image** icon.
 - On the email toolbar, click the **Insert image** icon.

Avaya Workspaces displays the image pool dialog box.

2. Click **Upload new image**.

If the image size exceeds the maximum limit, Avaya Workspaces displays an error message. If the number of images in the image pool reaches the maximum limit, Avaya Workspaces disables the **Upload new image** button. To upload a new image, you must first delete one of the existing images.

 **Note:**

Do not drag and drop, or cut and paste the images into the image pool dialog box.

3. Select the image that you want to upload, and click **OK**.

The image appears in the image pool dialog box.

To delete an existing image, select an image you want to delete and click the **Delete selected image** button.

You can not delete an image if it is used in a signature or inserted in an email body.

Adding inline images

About this task

You can add one or more inline images to an email message that you send to a customer.

Inline attachments display complete information within the body of the email. This makes the information easily accessible to customers, even without explicitly opening the attachment.

Administrators set the maximum number of images you can add to an email body.

*** Note:**

Avaya Workspaces supports the following formats: .gif, .bmp, .jpg, .png, and .gif without the animation.

Procedure

1. In the body text box, position your cursor where you want to insert your image.
2. On the email toolbar, click the **Insert image** icon.

Avaya Workspaces displays the image pool dialog box.

3. Select the image and click **Insert selected image**.

Avaya Workspaces shows the image in the email signature editor.

If you do not find a suitable image in the pool, you can upload a new one. See [Uploading images to the email image pool](#) on page 78.

Creating an HTML email signature

About this task

Use the following procedure to add, modify, or delete HTML email signatures. Avaya Workspaces supports one HTML signature and one plain text signature for each agent. You can add signatures to the bottom of outgoing email messages.

Procedure

1. In the navigation pane, click the **Settings** (⚙️) icon.

Avaya Workspaces displays the Settings widget.

2. Click the **Email Signature** tab.

3. Click **HTML**.

4. Add the content of the signature.

5. Set the formatting of the content, such as the font style, font color, and font size.

6. Select the **Automatically insert my signature in all emails** check box to automatically add signatures to all emails.

7. Click **Save**.

8. To modify the signature, update the content, style, or size depending on the type of signature and click **Save**.

9. To delete the signature, clear the content and clear the **Automatically insert my signature in all emails** check box.

10. Click **Save**.

Creating a plain email signature

About this task

Use the following procedure to add, modify, or delete email signatures. Avaya Workspaces supports one HTML signature and one plain text signature for each agent. You can add signatures to the bottom of outgoing email messages.

Procedure

1. In the navigation menu, click the **Settings** (⚙️) icon.
Avaya Workspaces displays the Settings widget.
2. Click the **Email Signature** tab.
3. Click **Plain**.
4. Add the content of the signature.
5. Select the **Automatically insert my signature in all emails** check box to automatically add signatures to all emails.
6. Click **Save**.
7. To modify the signature, update the content and click **Save**.
8. To delete the signature, clear the content and the **Automatically insert my signature in all emails** check box.
9. Click **Save**.

Adding images to signatures

About this task

You can add images to signatures. For example, you can add a company logo to increase brand awareness.

Administrators set the number of images and maximum image size allowed for each signature.

* Note:

Avaya Workspaces supports the following formats: .bmp, .jpg, .png, and .gif without the animation.

Procedure

1. In the navigation menu, click **Settings** (⚙️).
2. Click the **Email Signature** tab.
Avaya Workspaces displays the Signature Editor dialog box.
3. Position the cursor where you want to add the image, and click the **Insert Image** icon.

Avaya Workspaces displays the image pool dialog box.

4. Select the image and click **Insert selected image**.

Avaya Workspaces shows the image in the email signature editor.

If you do not find a suitable image in the pool, you can upload a new image. See [Uploading images to the email image pool](#) on page 78.

Transferring an email interaction within your Contact Center

About this task


You can transfer an email interaction to a skillset or another agent. You can only select a skillset with active agents. When transferring the email to another agent, you can select any agent, regardless of whether they are online or offline. A circular icon displays next to agents who are offline.

Note:

If your administrator applied agent skillset partitioning to transfers, you can only transfer interactions to skillsets assigned to you.

When you transfer an email interaction, you also transfer ownership of the interaction. Avaya Workspaces automatically forwards the entire interaction including any attachments. After you transfer the email, you are dropped from the email interaction.

Procedure

1. On the email interaction card, click  to transfer the email.
2. Do one of the following to search for a skillset or agent:
 - Select a skillset from the **Services** list.
 - Select an agent from the **Users** or **Team** list.

Forwarding an email

About this task

You can forward an email to any email address. The forwarding option is primarily intended for sharing an email externally. When you forward an email, the recipient also receives all included attachments.

Procedure

1. At the bottom of the email, click **Forward**.

2. Type the appropriate email addresses in the **To** and **CC** fields.
3. **(Optional)** Click **Add Bcc** if you want to add recipients who are not visible to others in the **Bcc** field.
4. Type a message and make any other required changes to the email.
5. Click **Send**.

Related links

[Transferring an email interaction within your Contact Center](#) on page 81

Revising a rejected email

About this task

Some emails require supervisor approval before they are sent to the customer. These emails are automatically redirected to a supervisor to approve or reject. As an agent, you cannot choose when to request approval. If the supervisor rejects your email, it is sent back to you for rework.

Email approval is only required if your administrator configured it. The administrator can configure email approval for agents or skillsets in the Contact Center Multimedia application. As part of this configuration, the administrator sets the ratio of emails that require approval.

Procedure

1. When you see an interaction card indicating that your email was rejected, click ✓ to accept the interaction.
2. Click **Show Review History** to view the latest supervisor comment and other review history information for the email.
3. Update the email as required.
4. Add a comment to summarize your update in the Review History area and then send the email.

Closing the email interaction

About this task

Close the email interaction when it is complete. When you close an interaction, you can select a disposition code.

After replying to an email interaction or forwarding it, you still need to close the interaction. After transferring an interaction to a skillset or another agent, the ownership of the interaction is also transferred, so you do not need to close it.

Procedure

1. Click **☰** > **Disposition Codes** and then select one of the available disposition codes that best describes the outcome of the interaction.
2. Click **✖** to complete the interaction.

Chapter 10: Outbound calls and callbacks

This chapter describes how to handle outbound calls and callbacks using Avaya Workspaces.

Outbound calls

The campaign administrator creates Outbound campaigns. When a campaign runs, the system pushes outbound contacts to your desktop similar to how the system presents voice contacts.

When you accept an outbound campaign contact, you are actively working on a call. Avaya Workspaces displays the customer information and any other information related to the campaign. Some campaigns include a script that you need to follow during the call.

If the campaign administrator selects manual agent dial, you can call the customer after reviewing the customer and campaign information. If the campaign administrator selects autodial, the call is placed automatically after a defined number of seconds.

You use the Avaya Workspaces interface to perform the following outbound tasks:

- Accept and decline the incoming contact
- Make an outbound call
- Follow a script
- Review and update customer information
- End a call and assign a disposition code
- Reschedule a call

Scheduled callbacks

You can use the Avaya Workspaces functionality to create a callback. Both customers and agents can create scheduled callbacks.

If your Contact Center is licensed for web communications, a customer can request a call from an agent through a Customer Interface website. On the website, the customer specifies their phone number, the reason for requesting the callback, and a date and time. These details can differ depending on the Customer Interface website configuration.

If the customer, who requested a callback, is unavailable, agents can reschedule a callback. Agents can also create their scheduled callbacks and assign the callback interaction to themselves or other agents with the outbound skillset.

At the specified date and time, Avaya Workspaces presents the interaction to an agent with the appropriate skillsets. To call back, a supervisor must assign an agent the skillset to handle outbound contacts.

The Schedule Callback feature is only available if your Contact Center is licensed for outbound contacts. However, a scheduled callback is not associated with an outbound campaign.

Related links

[Accepting an outbound contact](#) on page 85

[Declining an outbound contact](#) on page 85

[Using a script](#) on page 86

[Handling a callback scheduled by a customer](#) on page 87

[Scheduling a callback](#) on page 88

Accepting an outbound contact

Before you begin

- Ensure that you have set your status to Ready.
- Ensure that you have a skillset designated to handle outbound contacts.

About this task

Use the Avaya Workspaces interface to accept and handle outbound campaigns, one call at a time.

Your outbound administrator can configure the outbound calls in the following ways:

- Place the call immediately after you accept a call
- Place the call after a specified number of seconds
- Enable the agent to make the call

Administrators can configure Avaya Workspaces to give audio and visual alerts when a contact is presented.

Procedure

On the Avaya Workspaces interaction, click **Accept** (✓).

Avaya Workspaces displays the Preview Outbound widget with the campaign details.

Related links

[Outbound calls and callbacks](#) on page 84

Declining an outbound contact

About this task

You can decline an outbound contact if you want to reject the contact. Change your status to Not Ready if you are unavailable to handle contacts.

Procedure

On the Avaya Workspaces interaction, click **Reject**.

Related links

[Outbound calls and callbacks](#) on page 84

Using a script

About this task

Use a script if the campaign administrator has assigned an agent script to the outbound campaign. The content of the agent script depends on the campaign. The script can contain an introduction, a conclusion, and a number of questions or suggested phrases. As you progress through the script, you can record your answers or comments directly on the Outbound Call Script form. The customer responses are saved automatically.

* Note:

If the campaign administrator does not assign an agent script to the outbound campaign, the Outbound Call Script form does not appear.

Procedure

1. When on the outbound interaction, view the **Outbound Call Script** form.
2. Read the introduction to the customer.
3. Read each question present in the script to the customer.
4. To record customer responses, use one of the methods defined on the Outbound Call Script form:
 - Select an option from the list using radio buttons.
 - Select an option from the list.
 - Select one or several options from the list using check boxes.
 - Type the customer comments in a text box.
5. Read the conclusion to the customer.
6. Click **Call Summary**.
7. Select a disposition code.
8. **(Optional)** If the customer requests to re-schedule the call, select the **Re-Schedule Call** radio button and set the time for the new call.
9. In the **Agent Notes** box, enter your notes.
10. Click **Close (X)** to end the interaction.

Avaya Workspaces closes the interaction. If some script questions remained unanswered, Avaya Workspaces displays a notification. You can continue and close the interaction or stay and enter missing details.

Related links

[Outbound calls and callbacks](#) on page 84

Handling a callback scheduled by a customer

About this task

When a customer requests a callback through a Customer Interface website, they specify the date and time of the call and other required information. At the specified date and time, Avaya Workspaces presents the interaction to an agent with the appropriate skillsets.

When you accept the scheduled callback interaction, Avaya Workspaces displays the Scheduled Callback widget with the details provided by the customer, such as the subject of the request, callback time and a phone number. These details can differ depending on the Customer Interface website configuration.

Using the Scheduled Callback widget, you can make a call to the customer, add your notes, and re-schedule a callback if the customer is unavailable.

Before you begin

Ensure that you have the skillset designated to handle outbound calls.

Procedure

1. On the Avaya Workspaces interaction, click **Accept** (✓).

Avaya Workspaces displays the Scheduled Callback widget with the details provided by the customer. Before the call, you can edit the provided phone number or enter another phone number if required.

2. Click **Dial**.

Avaya Workspaces dials the phone number and displays a voice interaction card next to the scheduled callback interaction card. While the call is in progress, you cannot close the scheduled callback interaction.

3. Work on the contact.

4. When you complete the call, on the voice interaction card, click **End** (↩).

Avaya Workspaces closes the voice interaction card and returns to the scheduled callback interaction.

5. **(Optional)** In the **Agent Note** field, type your notes.

6. To complete the contact, do one of the following:

- On the scheduled callback interaction card, click **Close** (X).

Avaya Workspaces closes the scheduled callback interaction.

- At the bottom of the Scheduled Callback widget, select the **Reschedule Callback** check box, enter the date and time for a new callback, and click the **Close** button.

Avaya Workspaces closes the scheduled callback interaction. At the specified date and time, Avaya Workspaces presents the scheduled callback interaction to an agent with the appropriate skillsets.

Related links

[Outbound calls and callbacks](#) on page 84

Scheduling a callback

About this task

You can schedule a callback in response to an email message or telephone request from a customer. A scheduled callback outbound contact is not associated with an outbound campaign.

Before you begin

Identify a customer for a scheduled callback.

Procedure

1. In the navigation menu, click the **Customer Search** (🔍) icon.
Avaya Workspaces displays the Customer Search widget.
2. To search for a customer, specify the search parameters and click **Search**.
For more information, see [Searching for a customer](#) on page 41.
3. Next to the customer's name, click **Create Scheduled Callback** (↗️).
The Customer Search widget displays the Schedule Callback form.
4. From the **Skillsets** list, select the required skillset.
The Customer Search widget displays the list of agents with the selected skillset.
5. From the list, select yourself or another agent to whom you want to forward the scheduled callback.
The name and login ID of the selected agent appears in the Selected Agent field.
6. In the **Subject** field, type the subject of the contact.
7. In the **Reason** field, type the reason for the callback.
8. In the **Callback Time** field, specify the date and time of the callback.
9. Click **Send**.

Result

Avaya Workspaces creates the scheduled callback. At the specified date and time, Avaya Workspaces presents the scheduled callback interaction to you or another agent.

Related links

[Outbound calls and callbacks](#) on page 84

Chapter 11: Supervisor features

As a supervisor, you can access the following features in Avaya Workspaces:

- Observe a voice call or chat interaction.
- Whisper coach an agent during a voice or chat interaction
- Barge in to an interaction that you are coaching
- Remotely log out an agent
- Change an agent's status
- Approve or reject emails that require supervisor verification
- Release stuck agents and interactions

Use the **My Agents** option in the navigation pane to display a list of agents on your team, agents states, available channels, and other information.

Observing, coaching, and barging in to a call or voice interaction

Observing a voice interaction or non-skillset call

About this task

As a supervisor, you can monitor ongoing voice interactions or non-skillset calls between an agent and a customer to assess whether intervention is required.

For voice contacts, by default, an agent or a customer hears a tone when you join or leave the contact. They also hear a tone repeatedly at regular intervals. The contact center administrator can customize these settings. For non-skillset calls, by default, there are no observe tones. However, the administrator can configure these tones if required.


If configured by your Administrator, you can also observe outgoing agent-initiated CDN calls. If your administrator disables the ability to observe agent-initiated CDN calls, you can view these calls using the My Agents widget, but the Observe button is disabled.

If the agent being observed transfers the interaction, the system ends the observation session.

! **Important:**

Many jurisdictions have legal requirements concerning observing calls. Ensure that you observe calls only in compliance with national and local legislation. You must familiarize yourself with and comply with all applicable laws, rules, and regulations before using the observation feature.

Procedure

1. From the navigation pane, click **My Agents** (👤☰).
2. To find an agent, do one of the following:
 - Scroll through the list of agents.
 - Type the name of an agent in the search field, and click the **Search** icon.
 - Select appropriate values in the **Extension**, **Channel**, or **Status** fields.
3. Next to the name of the agent you want to observe, click .

You can now listen to the agent's voice interaction with the customer, but you cannot interact with the customer or the agent while observing.



Avaya Workspaces displays an interaction card with options to stop observing or start whisper coaching the agent.

Observing a second voice interaction or non-skillset call

About this task

You can observe two calls simultaneously. You can listen to only one call at a time, but you can toggle between them. When you listen to one call, the other call is always on hold. When you are observing two calls, the agents are not aware of whether you are actively listening in on their call.

Procedure

1. While observing the first call, click **My Agents** (👤☰).
 2. To find an agent, do one of the following:
 - Scroll through the list of agents.
 - Type the name of an agent in the search field, and click the **Search** icon.
 - Select appropriate values in the **Extension**, **Channel**, or **Status** fields.
 3. Next to the name of the second agent you want to observe, click .
- The first call you are observing is put on hold. You can now listen to the second agent voice interaction with the customer, but you cannot interact with the customer or the agent while observing.
4. To switch between the two calls, select the interaction you are not currently observing, and click  to unhold the call.

Whisper coaching an agent on a voice contact

About this task


You can coach an agent during a voice call to help train the agent or improve their performance. During the whisper coaching session, you can hear everything that is said on the call. However, the advice that you provide is audible only to the agent.

When you join or leave the voice interaction, by default, the agent hears a tone. The agent also hears a tone repeatedly at regular intervals. The administrator can customize these settings.

Before you begin

Ensure that you are observing the interaction for which you want to coach the agent.

Procedure

1. On the interaction card, click .
2. Provide advice to the agent.
3. Click **Release** when done.

You can go back to observing the voice interaction, or barge in to the voice interaction. The voice interaction continues until the agent or the customer releases the call.

Barging in on a voice interaction or non-skillset call

About this task

You can barge in to a voice interaction or non-skillset call to:

- Intervene if the agent cannot handle the interaction and requires additional assistance.
- Close a sale.

For voice contacts, by default, the agent and the customer hear a tone before you barge in on the contact. For non-skillset calls, there is no tone by default. However, your administrator can configure a tone if required.

Before you begin



Ensure that you are coaching the interaction. You cannot barge in without first coaching an agent.

Procedure

1. On the interaction card, click .

You now have full control over the interaction.

2. Do one of the following:

- If you address the customer request, click  to close the interaction card and leave the interaction.
- If you determine that another agent can handle the customer request, click  to transfer the interaction.

3. On the ACW card, provide information about the interaction and then close the ACW card.

Related links

[Using ACW time to wrap up an interaction](#) on page 38


Observing, coaching, and barging in to a chat interaction

Observing a chat interaction

About this task

As a supervisor, you can observe an ongoing chat interaction to determine whether further intervention is required. While observing, you see the active chat interaction with the customer, but you cannot send a message to the agent or customer.

Procedure

1. From the navigation pane, click **My Agents** (👤☰).
2. From the list of agents, search for the agent whose chat interaction you want to observe.
3. Click  to start observing the interaction.

Next steps

End the observation session or start coaching the agent.

Coaching an agent during a chat interaction


About this task

You can start a coaching session to provide guidance to an agent. During the coaching session, you can whisper private messages to the agent. You also see the chat conversation with the customer, but the customer only receives chat messages from the agent and not from you.

Before you begin

Ensure that you are observing a chat interaction.

Procedure

1. On the interaction card that is displayed during the observation session, click .
2. On the Coaching tab, type a private message to the agent.

You also see the conversation with the customer on this tab. Continue privately coaching the agent as you monitor the chat interaction.

Next steps

End the coaching session or barge in to the chat interaction if you need to chat with the customer directly.

Barging in to a chat interaction




About this task

You can barge in to assist with a chat interaction. When you barge in, you join the interaction as an active third party. You, the agent, and the customer can send three-way messages to each other.

Before you begin

Ensure that you are coaching the interaction.

Procedure

1. On the interaction card, click  to barge in to the interaction.
2. Send chat messages to the agent and customer.
3. Do one of the following:
 - Click  to close the interaction card if you have successfully addressed the customer's request.
 - Click  to transfer the interaction to another agent who can provide further assistance.
4. On the ACW card, provide information about the interaction and then close the ACW card.

Related links

[Using ACW time to wrap up an interaction](#) on page 38

Remotely logging out an agent

About this task


If an agent does not exit Avaya Workspaces after finishing work, you can remotely log out the agent.

You can not remotely log out an agent, who is active on an interaction. The agent must close the interaction before you log the agent out of Avaya Workspaces.

Before you begin

Ensure that the administrator grants the correct permissions so that you can change the agent status.

Procedure

1. In the navigation menu, click the **My Agents**  icon.
2. Click the name of the agent, whom you want to log out.
3. Under Status, click the button indicating the current agent status.
4. From the drop-down list, select **Finish Work**.

The agent status changes to Logged Out.

Changing agent status

About this task

Use this procedure to change the status of an agent.

For example, an agent can take a break or leave while logged in to Avaya Workspaces. You can change the agent status to Not Ready to prevent interactions from being routed to this agent. You can not change the agent status back to Ready.

If you change the status of an agent, who is active on an interaction, to Not Ready, Avaya Workspaces changes agent status to Not Ready Pending. When the agent closes the interaction, the agent moves to the status that you have set.



Note:

You can only view and change status of agents that are logged in to Avaya Workspaces. If an agent of your team is logged in to Agent Desktop, you cannot view and change that agent status in Avaya Workspaces.

Before you begin

Ensure that the administrator grants the correct permissions so that you can change the agent status.

Procedure

1. In the navigation menu, click the **My Agents** ( ) icon.
2. Click the name of the agent, whose state you want to change.
3. Under Status, click the button indicating the current agent status.
4. From the drop-down list, select the status to which the agent must be changed.

Avaya Workspaces displays the changed status and sends the agent a notification about the changed status.

Approving or rejecting emails

About this task

As a supervisor, you might receive emails that require verification. When you approve an email, it is sent to the customer. When you reject an email, it is sent back to the agent for rework.

Procedure

1. When you see an interaction card indicating that an email requires verification, click ✓ to accept the interaction.
2. Click **Show Review History** to view the agent's comment and other review history information for the email.
3. Review the email and add a comment in the Review History area.
4. At the bottom of the email, click **Approve** or **Reject**.

Related links

[Revising a rejected email](#) on page 82

Releasing stuck agents and interactions

About this task

Avaya Workspaces contains CCS and ADF components that interact with each other. Failures in CCS or ADF sessions can cause stuck interactions or agent status mismatch between Avaya Workspaces and the Contact Center server. When these issues occur, agents may not be able to close interactions or log in to Avaya Workspaces.

As a supervisor, you can use the Monitoring Service utility to release stuck interactions and log out stuck agents.

Warning:

You must use the Monitoring Service utility to release only stuck agents or interactions. Do not use the Monitoring Service utility to release agents or interactions that are operating normally.

Monitoring Service is a browser-based application that you can access using the following URL: `http://<CLUSTER_VIRTUAL_IP>:31380/monitoring/`. The URL format can differ depending on your Contact Center configuration. To use the Monitoring Service utility, you must be logged in to Avaya Workspaces.

Monitoring Service allows you to search and log out agents and clean interactions individually or in bulk.

Using the Monitoring Service utility, you can view the following information:

- Agent's status on CCS and ADF sessions
- Agent's resources that are allocated in CCS and ADF components
- Agent's active interactions that are presented in CCS and ADF components

Procedure

1. Log in to Avaya Workspaces.
For more information, see [Logging in to Avaya Workspaces](#) on page 33.
2. In your web browser address bar, enter the URL of the Monitoring Service utility.

The browser displays the Monitoring Service interface.

3. Under **Agent**, type the Agent ID of the agent to search.
4. Click **Search**.

Monitoring Service displays agent's details.

5. To release a specific interaction, under **List of interactions that are presented in CCS or ADF side**, locate the interaction to release and click **Clean**.

The interaction disappears from the agent's interaction area.

6. To release all interactions that are currently presented to the agent, at the bottom of the screen, click **Clean All Interactions**.

All interactions disappear from the agent's interaction area.

7. To clean the ADF session, click **Clean ADF session**.
8. To log out the agent, under the agent's name, click **Logout**.

The agent is now logged out of Avaya Workspaces.

Chapter 12: High Availability

Avaya Workspaces supports High Availability for fault tolerant and resilient contact center solutions. In High Availability contact centers, Avaya Workspaces connects to multiple Contact Center servers. If one of the Contact Center servers fails or is shut down for maintenance, your Avaya Workspaces software switches over to the remaining Contact Center servers and continues working.

Normally, you do not notice a server switchover, you remain logged on and you continue handling customer phone calls without interruption. The Avaya Workspaces multimedia contacts list refreshes during a server switchover and this causes a short delay before new multimedia contacts arrive. In limited circumstances, Avaya Workspaces experiences a short delay during server switchover and if this occurs you must log on again after the switchover. Phone calls in progress with a customer are not affected by a switchover.

The following procedures describe how to handle Avaya Workspaces in a High Availability contact center.

 **Note:**

Avaya Workspaces High Availability is only supported in Avaya Aura® Contact Center High Availability environment.

Handling multimedia contact refreshes during a switchover

About this task

Avaya Workspaces software supports multimedia contacts such as emails and chat messages. Avaya Workspaces also supports a licensed multiplicity feature. Multiplicity is the ability to handle multiple concurrent contacts. At any one time you can be active on both a voice and multimedia contact. However, when one contact is active; the others are automatically placed on hold.

If a Contact Center server switchover occurs, all Avaya Workspaces contacts refresh; they are removed and recreated in Avaya Workspaces after the switchover. This contact refreshing can take a few seconds, depending on the number of contacts you have open. During the contact refreshing period you cannot use Avaya Workspaces to handle multimedia contacts, but you can continue to handle customer voice calls using your desktop phone. When the contacts have refreshed, the contact open time is correct and typed contact information is still present. If you were typing an email reply when the switchover occurred, your unfinished email is preserved and

you can continue typing from where you were interrupted. You can continue to handle customer contacts using Avaya Workspaces as normal.

Avaya Workspaces uses EWC as the web chat solution, which has a 20 seconds delay on switchover.

Procedure

1. If Avaya Workspaces starts to refresh the contacts in your interaction list, do not use Avaya Workspaces. Stop typing and allow Avaya Workspaces to completely refresh the contacts in the interaction list.
2. If you are handling a customer voice contact, continue to handle the phone call using your desktop phone.
3. When the interaction list has fully refreshed, confirm that all your contacts are still open and continue handling multimedia and voice contacts using Avaya Workspaces.

Chapter 13: Business Continuity

Avaya Workspaces supports Avaya Contact Center Select Business Continuity for fault tolerant and resilient contact center solutions. In contact centers using Business Continuity, Avaya Workspaces normally connects to the active Contact Center server. If the active Contact Center server fails or is shut down for maintenance, administrators need to reconfigure the standby server to become active. After reconfiguration, agents need to log in to Avaya Workspaces on the new active server.

The following procedures describe how to use Avaya Workspaces in a contact center using Business Continuity.

Handling Avaya Workspaces during a switchover

About this task

If a Contact Center server switchover occurs, agents need to relaunch Avaya Workspaces and log in on the new active server.

 **Note:**

Work in progress, for example, email draft, is lost.

Procedure

1. Relaunch Avaya Workspaces using the IP address of the new active server.
2. Log in to Avaya Workspaces using your credentials.
3. Continue handling contacts as normal.

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