Office Manager

Get Started

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TeamView® Office Manager - Get started

This introduction is divided into 2 sections

Every day functions and features

- Telephony and agent functions
- Colleagues
- Call window and call log
- Practical examples
- Queue bar and queue notifying
- Integration
- Contacts

Configuration

- Phone
- Options
- Integration
- Agent

Every day – functions and features

- Telephony and agent functions
- Colleagues
- Call window and call log
- Practical examples
- Queue bar and skill groups
- Integration
- Contacts

Telephony functions

- All functions are accessible via mouse or keyboard. Only icons which are currently usable are highlighted. The voice mail icon is only highlighted if a voice message is recorded.

Make call   On Hold   Transfer   Send all calls   DTMF   Always on top

Answer   Hangup   Group pickup   Voice mail   Help

On Hold   Complete transfer

Hang up

Answer call/Unhold

Make call/search

Lunch

Meeting

Short Absence

Business Travel

III
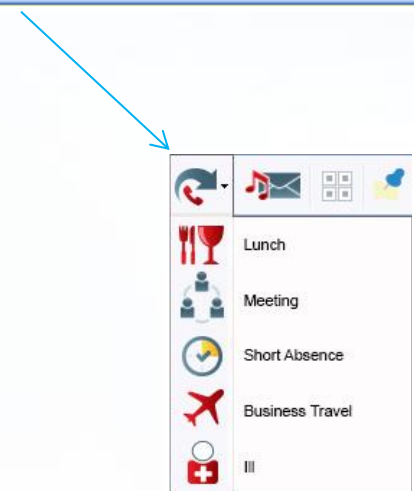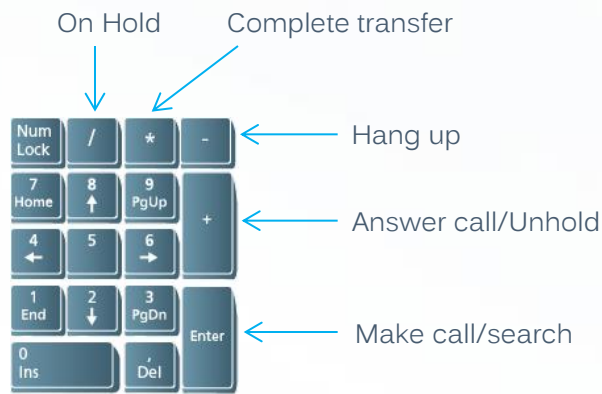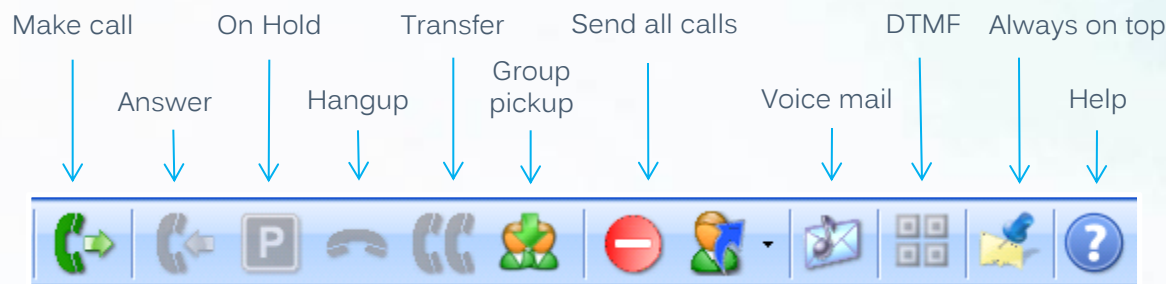
Agent functions

ACW duration can alternatively be configured centrally at Avaya CM. This implies that all agents operate with fixed ACW duration.

Logout   Ready   ACW   AUX

An agent is automatically set to AUX if a call is not answered

Lunch
Short Break
Meeting
Business travel
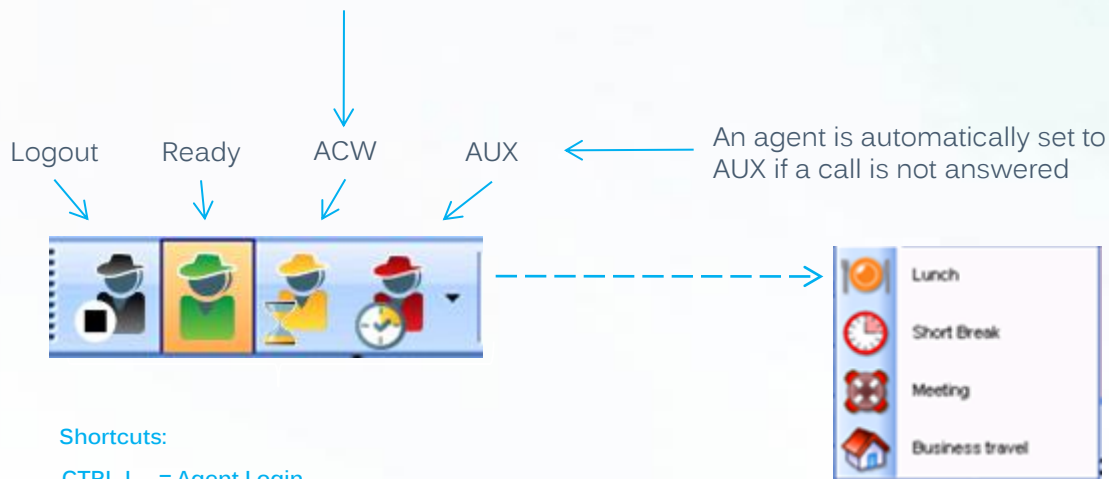
Shortcuts:

CTRL-I   = Agent Login
CTRL-O   = Agent Logout
CTRL-R   = Agent Ready
CTRL-A   = After Call Work
CTRL-Z   = Agent AUX

Colleagues - search

Search colleague will usually take place in this way.
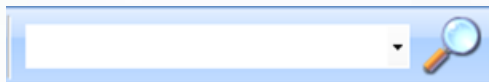
Search is supported by phonetics, and can be applied with word elements or free text format.

Searchable data

Organizational

Department

Title

Skills

Contact related

Name

Initials

Local no.

Mobile no.

Alternatively colleagues can be identified through the tab Colleagues, where they are presented according to the organizational structure.

Colleagues - presentation

- This section presents staff/contacts in alphabetical order. When the input (search) starts, the number of employees are reduced up to match, or until the employee is shown in the list – then click on this.

Todays calendar appointment(s). Reflects colors from Exchange/Notes.
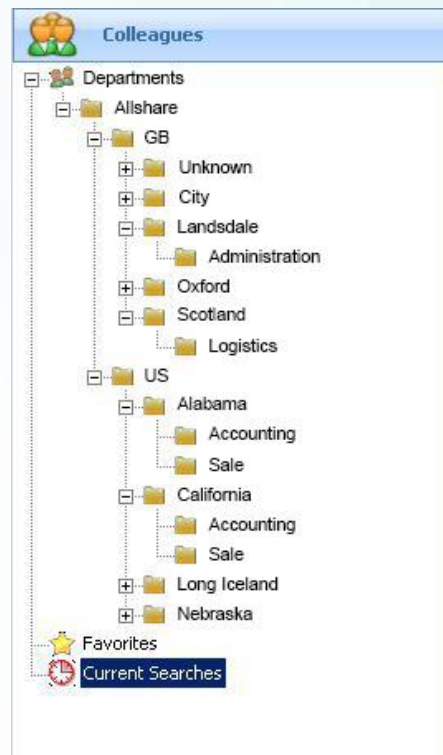
Agent status

Tittle and department

Further information about the employee is displayed by right click.

Calender info
16:00 - 17:00 Møde

Mouse over appointment displays details
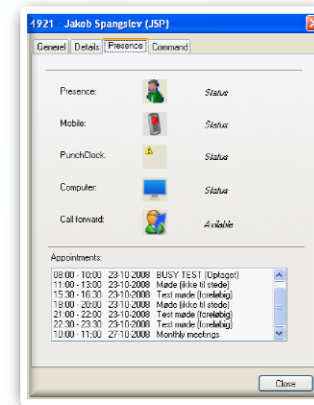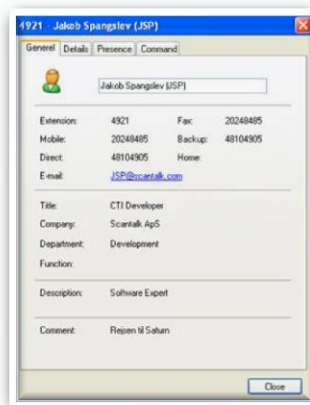
Phone status/ Absence code

Colleagues - details

An comprehensive overview of a colleague's contact points and organizational affiliations is displayed by right-click on the colleague. For further details select Properties.
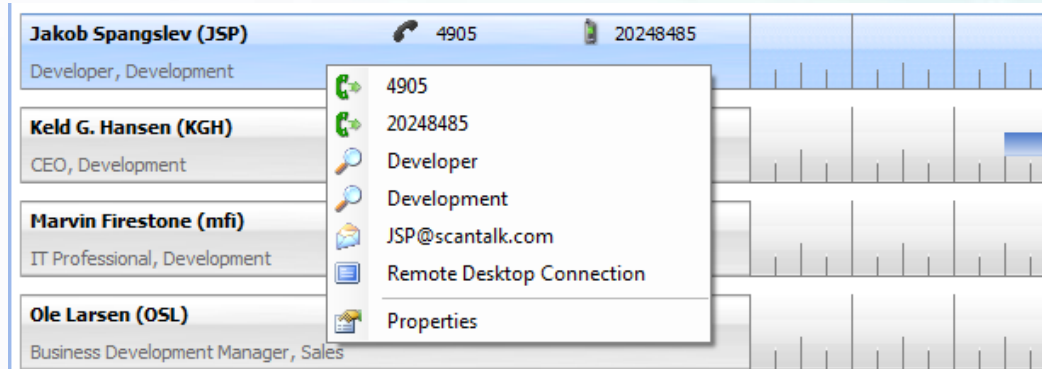
You can call the colleague by click on number (landline or mobile).
Send e-mail by click on e-mail address.

Properties

Status icons

- Icon gross list which can represent status on employees/contacts in the total TeamView env. Available icons depends on which TeamView applications are used in the individual installation.

Phone	Free	Busy	Logout	Unknown	Send All Calls	Forwarded	Forwarded VM)	Ext. contact
Absence	Materity leave	Vecation	Ill	Meeting	Gone for today	Lunch	Short absence	Other
Agent	Free	After Call Work	Pause /AUX	Logout				
Mobile	Free	Busy	Logout	Unknown				
In/Out	Present	Not present	Not attached					
PC	Loggon	Screen save	Logout	Not Attached				

Call window

- If the name of the other part is not known by the system only phone number is shown.

- The maximum number of call appearances is 6.

Phone status   The other parts no./name   Start time   Duration

| P | 🠔 | 14942 | 👤 | Mona Monsen | Agent<--4902 | 11:09:24 | 0:30 |

The 3 variants

Information about recipient

If the recipient's name appears it is a direct call

Alternatively it can be either a colleague's name (the one who originally was called), or the name of a hunt-group which the recipient is a member of.
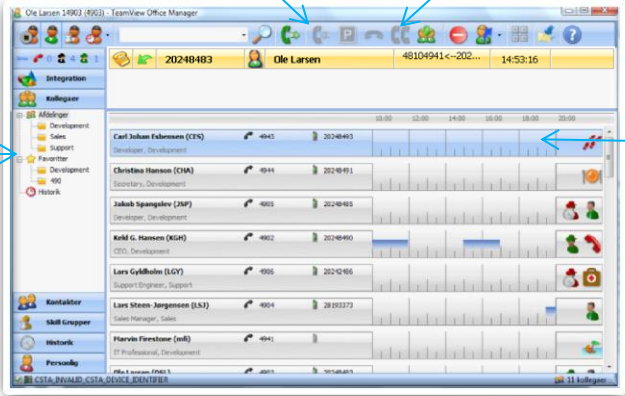
Call-log

All calls to/from an employee is logged locally - sorted by incoming, outgoing and lost calls.

All local call-logs are accumulated into a central database.

Practical examples
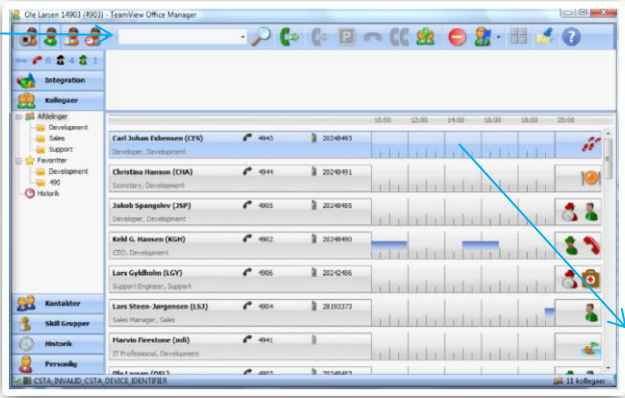
- Consulted transfer to colleague

Answer call   1   4   Complete

Search

2

3   Double click on employee

2

Search

3

5   Complete

1   Answer call

4   Make call

Move focus to employee

Practical examples

- Direct transfer to colleague

Answer call — 1   4 — Complete

Search — 2

3 — Click on employee

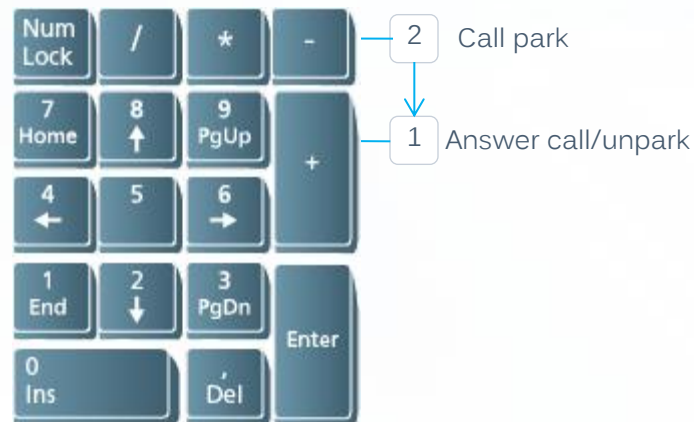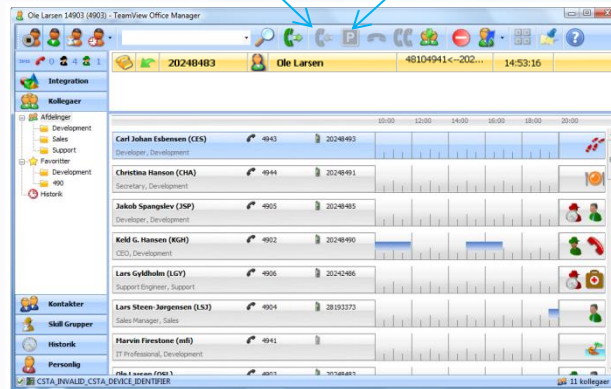2 — Search

3

4 — Complete

1 — Answer call

Move focus to employee

Practical examples

- Call park / unpark

Answer call/unpark 1 ← 2 Call park

2 Call park

1 Answer call/unpark

Practical examples

- Make call, write to or lookup details on colleague/contact

Search

1

2 Right click on employee

Click on desired function (no./e-mail).
For more details select Properties
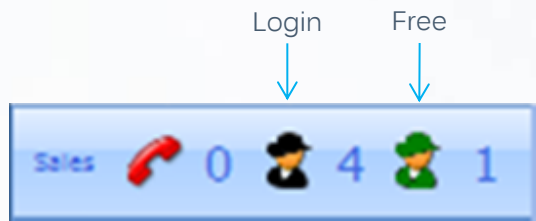

1

Search

3 Right click on employee

Click on desired function (no./e-mail).
For more details select Properties.
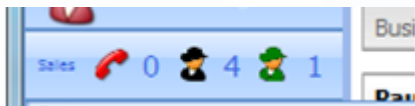
2 Move focus to employee

Queue/bar for hunt-groups

Login   Free

Calls in queue

If you are member of several hunt-grups you are free to choose which one to be shown here. The other groups are shown under the tab Skill Groups.

You are free to place the queue/bar at the top or bottom.

You can insert limit values (2) for max. number of calls in queue. When a limit is exceeded you will be alerted.
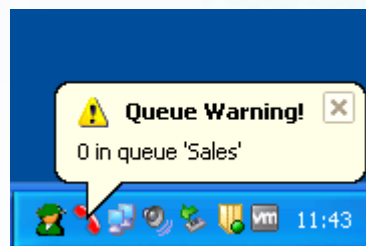
The taskbar displays an Office Manager icon. The icon indicates the current agent status. Therefore you do not need to activate the Office Manager to check the current status.

Integration

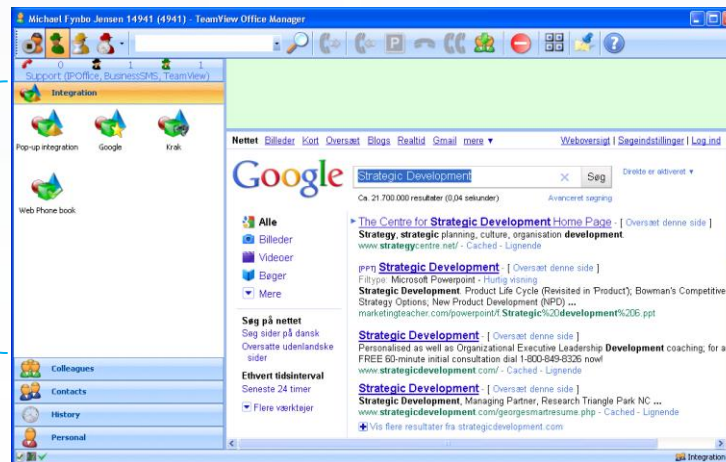The following forms of integration are possible:

- Automatic popup of inter-/intranet-pages
- Automatic popup of Windows applications
- Activate internet/intranet-pages (from favorite list)
- Activate Windows applications (from favorite list)
- Make calls from Windows applications

Favorite list

Contacts

Contacts (common and private) can be entered in a traditional folder structure, as users themselves are responsible for.
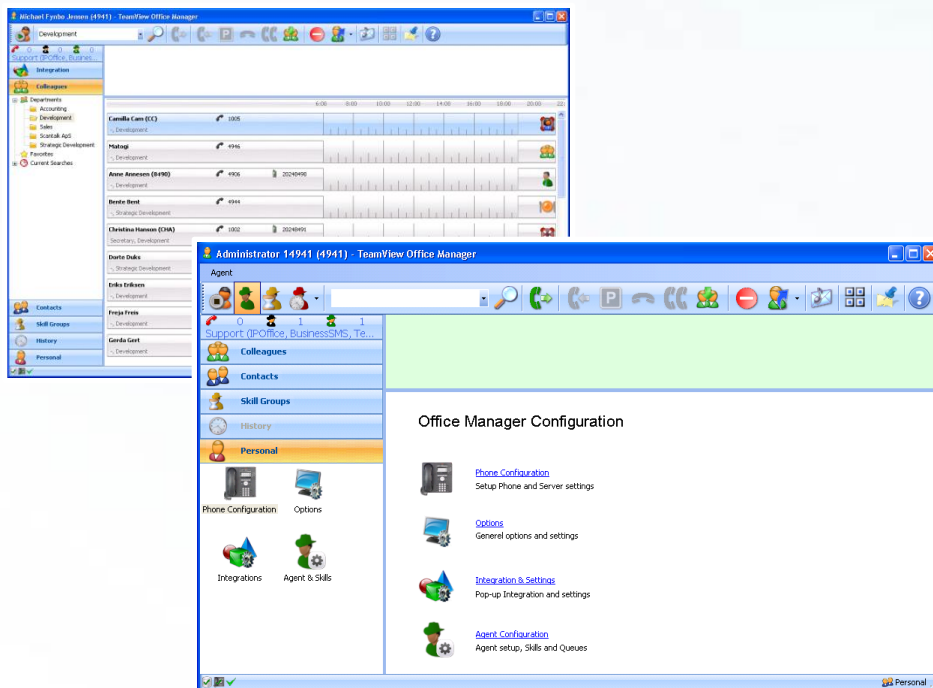
Contacts can be imported from Outlook to a private folder, which then individually can be transferred to shared folders with drag & drop.

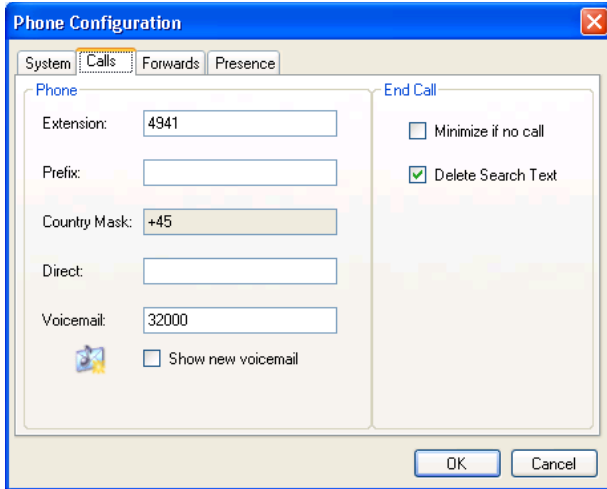You can call or send e-mail by right click.

Personal Configuration

This section only deals with the issues as the individual user has influence on.

All other issues are handled centrally.

- Phone
- Options
- Integration
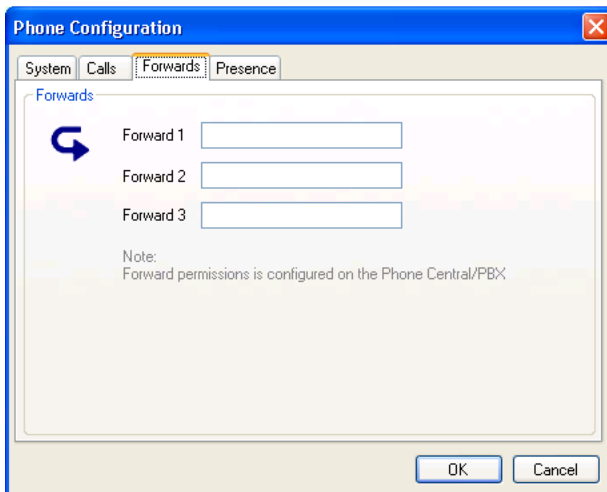- Agent

Phone (call & forward)

- enter your extension, country mask (and direct number)
- checkmark for show new Voicemail (=highlight icon)
- automatic minimization of the application by end call
- erase search text field by end call
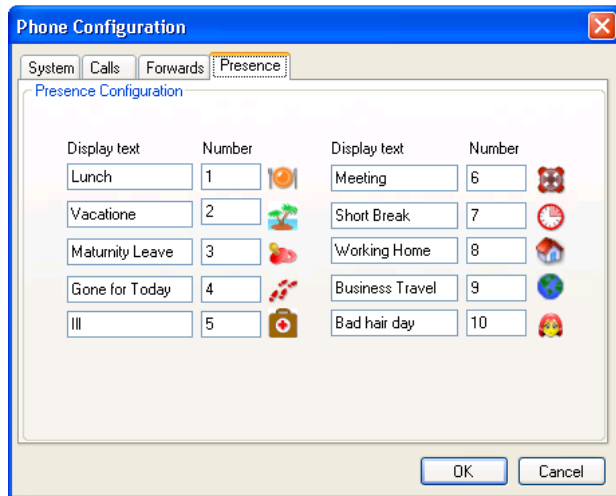
You can enter up to 3 numbers , which complements the absences messages (see next page). The numbers are presented together with the absences messages when the forwarding icon is activated.

Phone (Presence)

Up to 10 numbers (VDN) can be booked (centrally) for handling absence causes. When you forward your phone to one of these numbers (by click on an icon), the icon will show your phone status with your colleagues.

PS: For each VDN it is possible to attach voice messages (centrally) - eg. one being played by internal calls and one covering the external calls.

Options (General & Calendar)
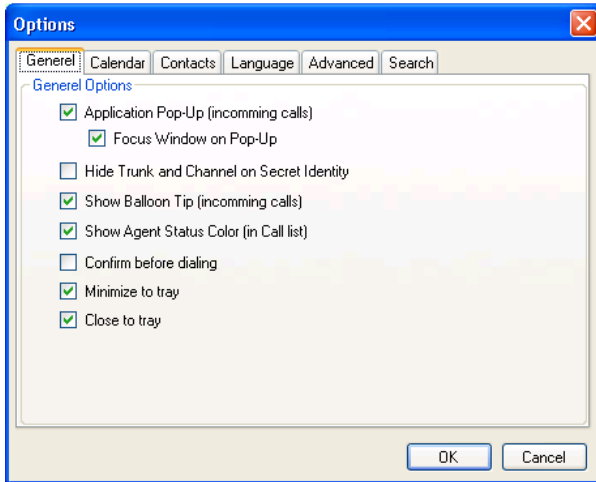

- Popup in front of all applications on incoming calls
- Hide caller (garbage-)information on secret identity
- Show balloon tip on incoming calls (alt. to automatic popup)
- Show Agent status color in call window (previously described)
- Confirm outbound call before dialling
- Minimize to systray (alternative to taskbar)
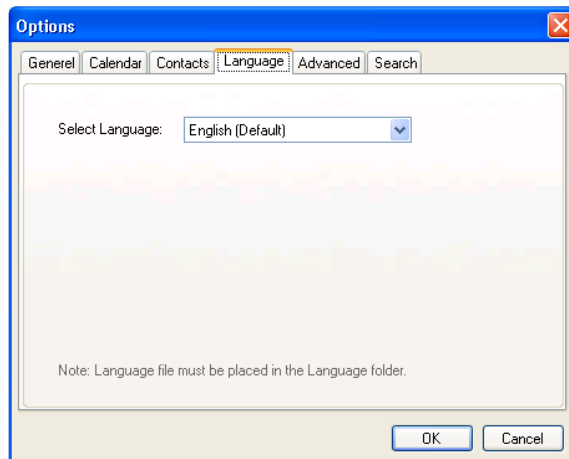- Close to systray (alternatively exit the application)
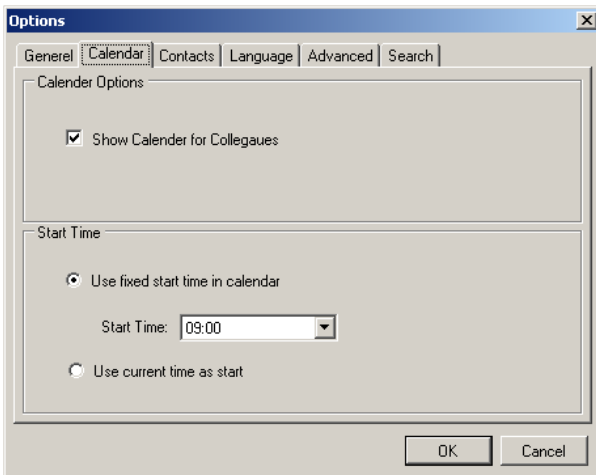
Show calendar appointments for colleagues
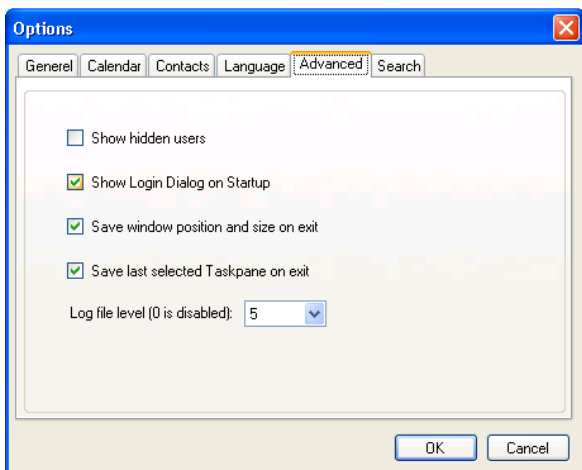Use either fixed or current time as start
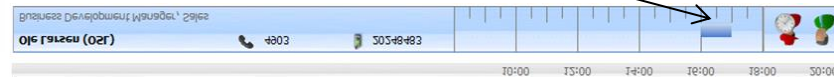
Options (Contacts & Language)
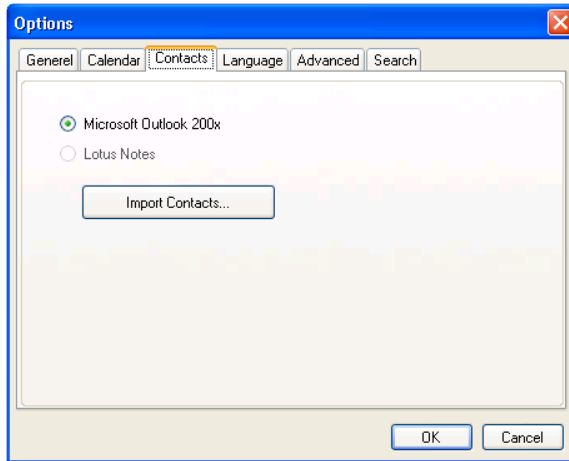
You can import contacts from MS Outlook. The contacts are placed in your private folder, from which you can transfer selected or all to common folder - with drag & drop.
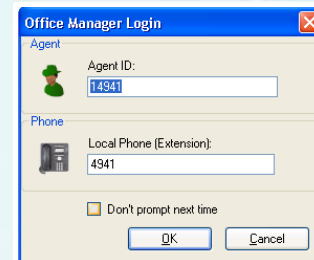

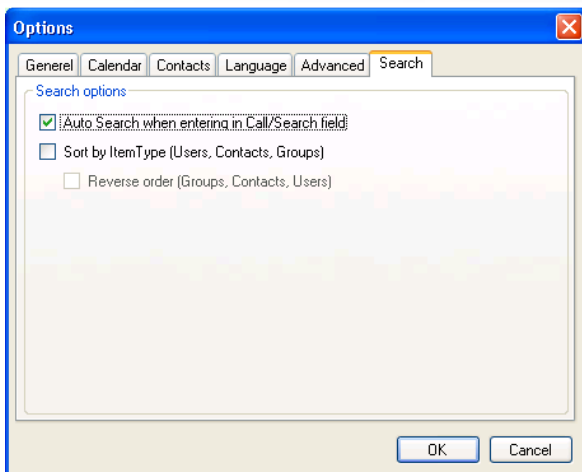Here you have the option to select language.

Options (Advanced & Search)

- Show hidden users (eg. deleted)
- Show login dialog on startup
- Save window position and size on exit
- Save last selected task panel on exit

Eg. colleagues

Auto search is not supported (you have to enter search criteria and press Enter).

Sort by item type (the order in which data (colleagues/contacts) is presented when searching).

If no checkmark, data is presented in alphabetical order.
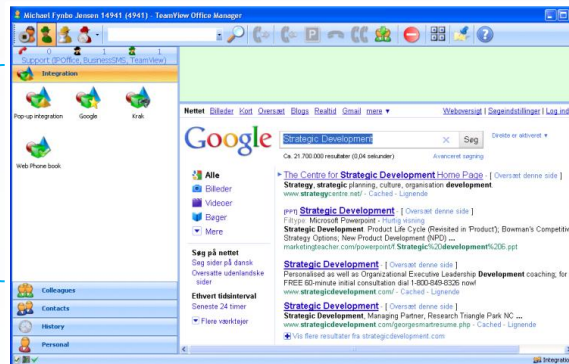
Integration

- ## Automatic popup

  The system support automatic popup of inter-/intranet-pages and Windows applications (centrally defined).

  Which system to popup depends on what B-number (hunt-group) is called, and the content is based on either A-number or input from an IVR system.

- ## Manual activation

  Manual activation of internet/intranet-pages and Windows applications is possible (from   the Favorites list). Which system to popup in a given situation depends on an organizational guidance, and the content is based on either A-number, input from an IVR system or based on manual input from the user (eg. policy number).
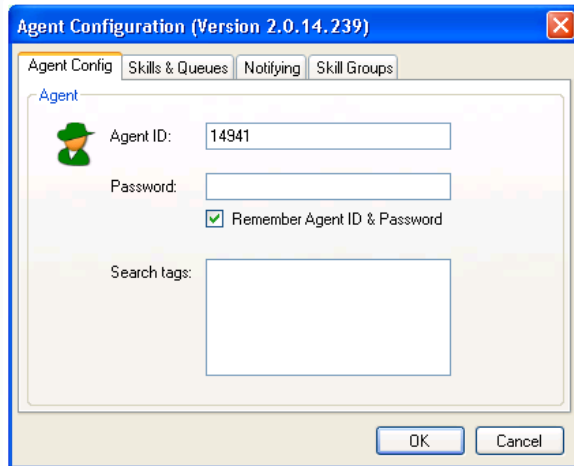
Favorites list

All configuration parameters related to the integration is carried out centrally.

It is also possible to make calls from Windows applications. This function must be supported by the individual application.

Agent (configuration, Skills & Queues)
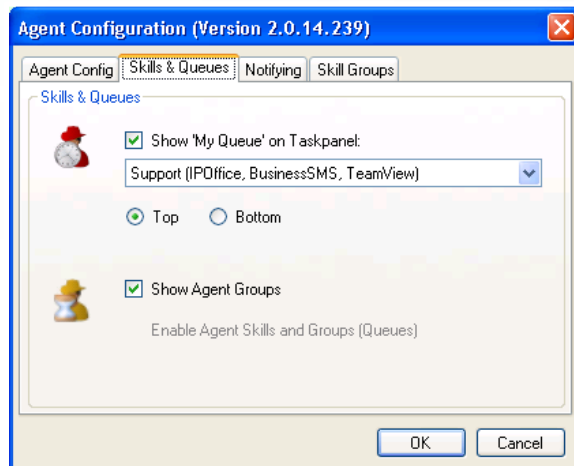
Enter your Agent ID (and password)

Show Agent groups
It is centrally defined which groups are relevant (see next page)

Agent (Queue notifying & Skill groups)
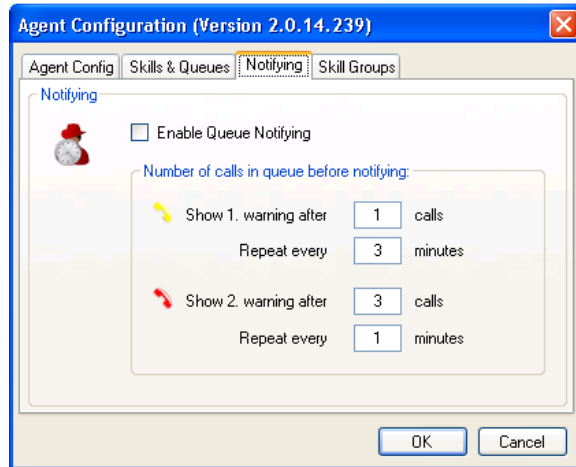
Enable queue notifying (2 levels)
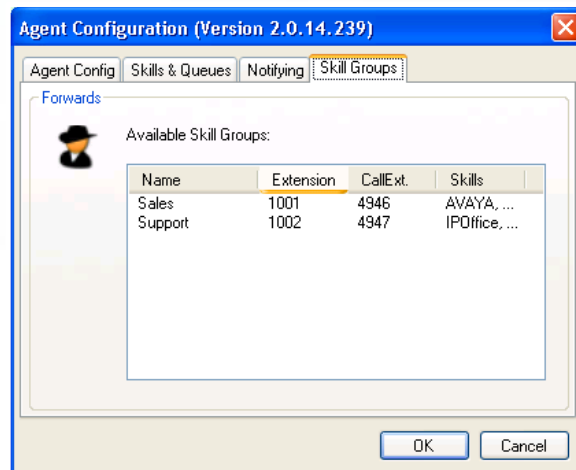
Shows available (relevant) skill groups