

Competella Multimedia Agent R2.5 for Teams User Guide

January 2021 Rev 4

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Introduction

This user guide describes how to use Competella Multimedia Agent.

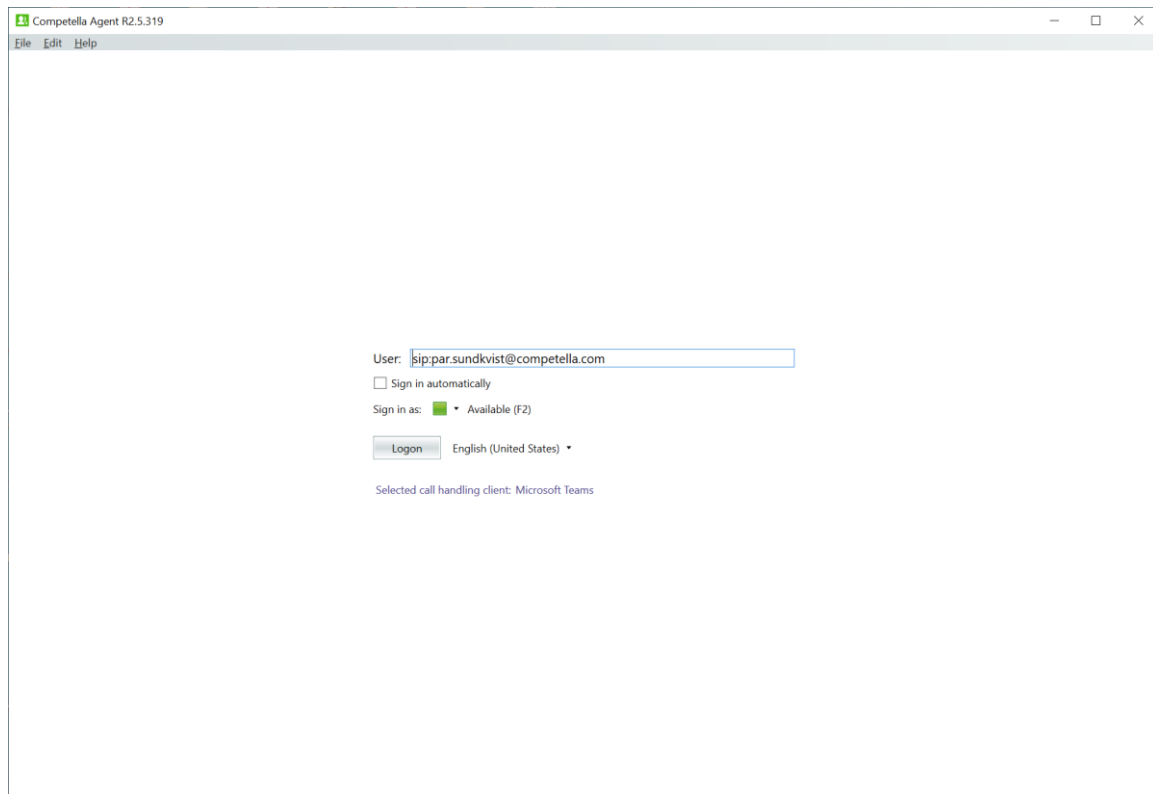
Audience: Agents using the application.

Starting and Logging in

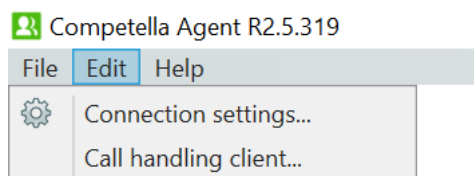
Make sure that the Microsoft Teams client is running.

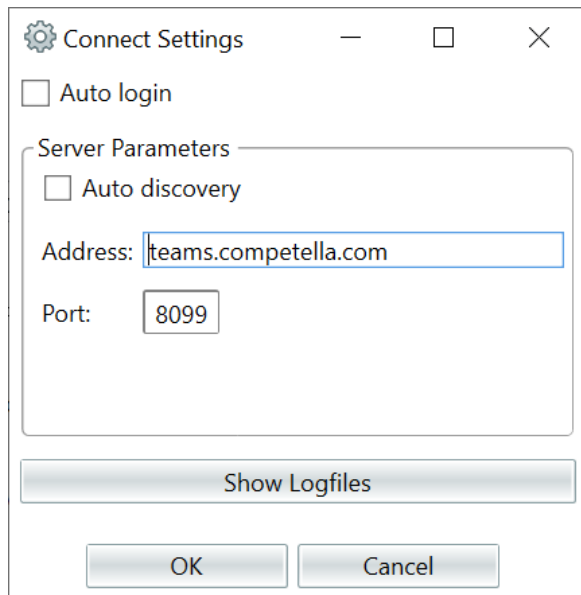
Start Competella Multimedia Agent by double-clicking the shortcut icon on the desktop or via the **Start** menu by clicking **Competella Agent**.

The login window will be displayed.

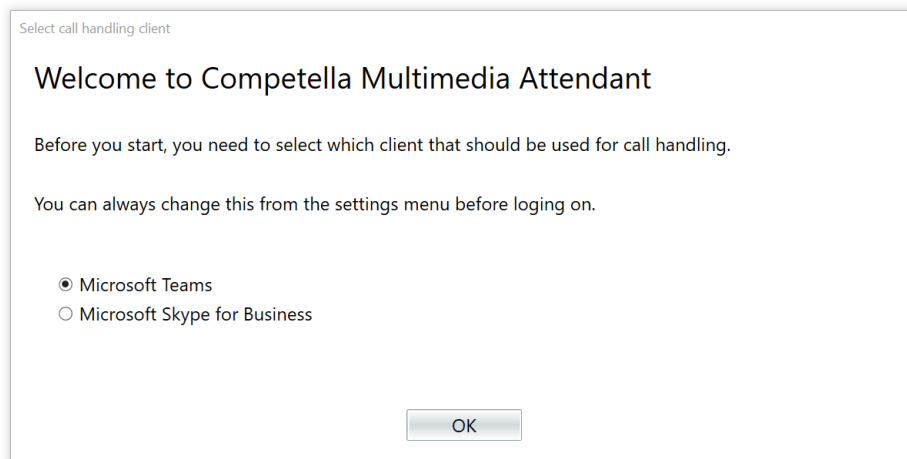


Click the Edit menu to set the Connection settings.





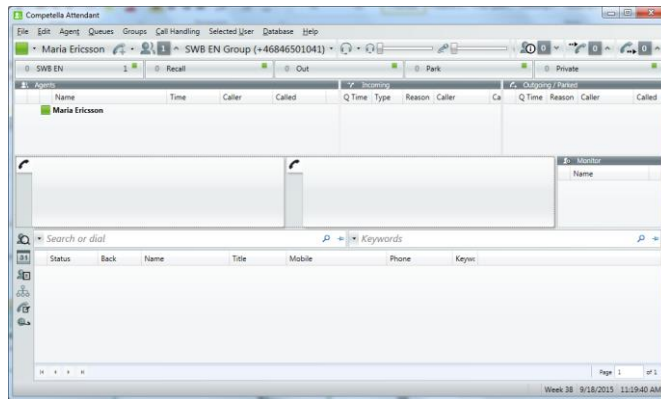
Select Microsoft Teams as the Call Handling Client.



Select if you want to log in as **Available** agent or not and which language setting you want to use. You can use the F2 key to toggle status between **Available** and **Paused**. Then click the **Logon** button or press **Enter**. The Competella Multimedia Agent main window will be displayed.

Overview of the User Interface

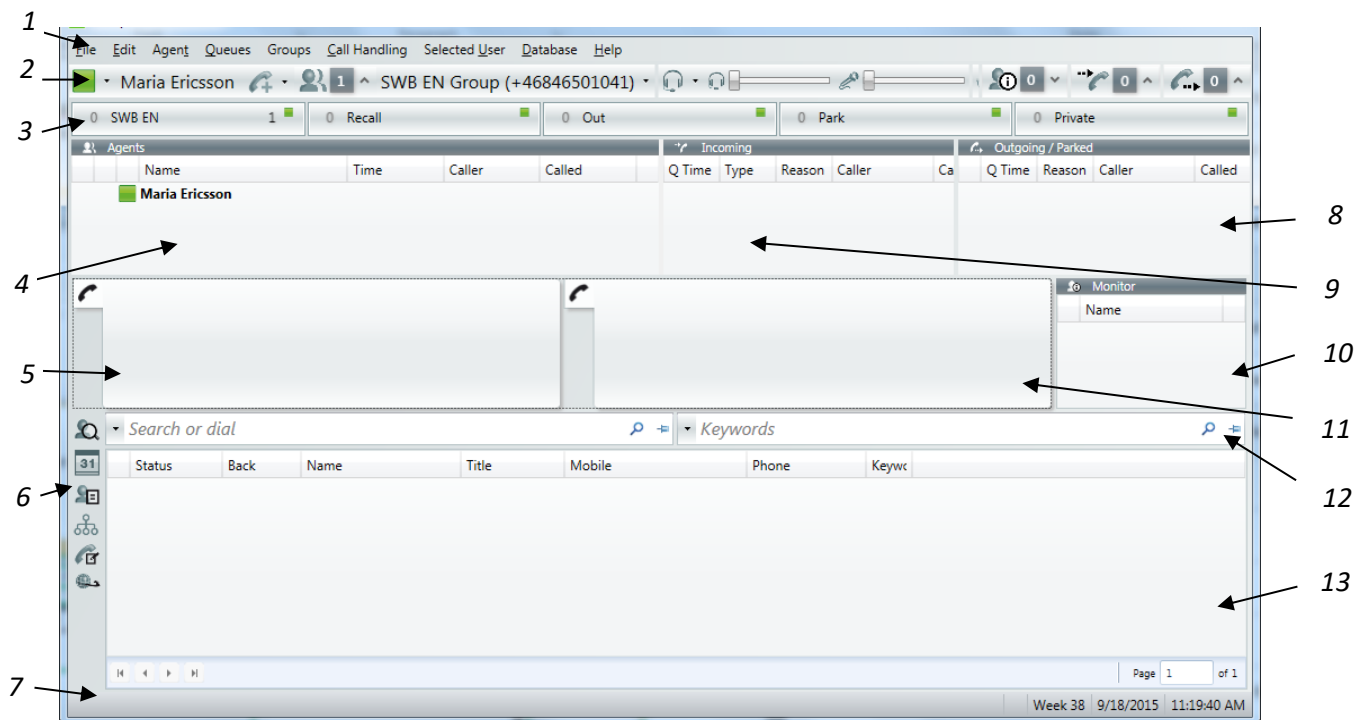
The Competella Multimedia Agent main window has two parts, the queue handling and the directory search.



*Queue handling,
call control, chat*







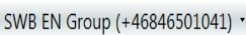




*Directory search,
presence and
calendar
information*

Below you can see which parts the screen consists of in more detail.



Item number	Description
1.	Dropdown menus, see page 26 for all menu options
2.	Call control toolbar, see page 11 for button descriptions
3.	Queue buttons. Here you see the queues with incoming calls, recalls, outgoing, private and parked calls as well as e-mail queues
4.	Active agents. Which agents that are active on the same queue
5.	Left call field (also known as A field)
6.	Sidebar menu, see page 11 for button descriptions
7.	Status row
8.	Outgoing/parked queue
9.	Incoming queue
10.	Monitored users list
11.	Right call field (also known as B field)
12.	Search fields
13.	Search results with result navigation buttons















Call Control Toolbar Buttons

Symbol	Description
	<p>Set agent status by clicking the dropdown list in the upper left corner or by pressing F2. It is also possible to set the agent status by right-clicking the program icon in the system tray.</p> <p>The color of the symbol indicates the status of the agent. You can select between Available and Paused. The other two statuses are managed automatically. There may be several different pause statuses depending on your system configuration.</p> <ul style="list-style-type: none">  Available  Paused  Busy (for example writing a message)  Busy in call
	Show or hide the list of active agents. The number indicates the number of active agents
	Select identity shown on outgoing calls
	Show or hide the list of monitored users. The figure shows the number of monitored users
	Click to show or hide the list of calls in in-queues. The figure shows the number of incoming calls
	Click to show or hide the list of calls in out-queues. The figure shows the number of outgoing calls
	Number of incoming e-mail messages

Sidebar Menu Buttons

In the sidebar menu there are some buttons that may become handy when dealing with searching and handling users.

Symbol	Description
--------	-------------

	Show search view
	Show calendar view for selected user 
	Show organization list for selected user  + 
	Show call log for selected user  + 
	Show saved e-mail messages
	Show conversation log
	Show all info for selected user 
	Open an integrated web browser in the lower part of the screen

Keyboard

Many of the functions in Competella Multimedia Agent can be performed by pressing quick commands (keyboard buttons and combinations of keyboard buttons). Most of the quick commands involve function keys or keys on the numerical keypad. See page 33 for a list of quick commands.

To display a list of available functions click **Show Commands** in the **Help** menu.

Stickers to put on the keyboard buttons can be provided.

Searching in the Directory

General about Searching

Fuzzy search. Competella Multimedia Agent uses "fuzzy search" for free text search similar to the search functions in for example Google and Bing. It means that the search string does not have to perfectly match the search hits. The most relevant search hits will be displayed first.

Specify your search. By default the search function searches all fields in the database. By clicking on the arrow to the left of the search field you can specify what you are searching for to narrow down the search.

Progressive search. Searching is progressive, which means that the search is run as you type without pressing **Enter**.

Combination search. All information in the database can be searched. More than one keyword can be entered for a combination search. You can add more search fields then the default ones.

Search presentation:

- The first 30 hits will be presented, but you can navigate through all hits with the buttons below the search results.
- The selected person in the list will by default be presented with his or her personal information card as seen in search example 1 below. This behavior is configurable.
- If you show all info (F4) for a person the information will be presented as clickable links. Clicking on a phone number will call the number, and clicking on an e-mail address will create a new e-mail. Other information will be searched for if clicked upon.

Search Examples

Example 1: Search for last name

Presence *Activity* *Back time* *Info message*

Status	Back	Phone	Name	Title	Organization	Mobile	Keywords	Mail Address	Act
Holiday	Monday 8:00 AM		Carolina Wester	Account Manager	Sales Swe			Carolina.Weste	

Page 1 of 1

Info message: Holiday in Cinque Terre. Call mobile if urgent.

Organization: Sales Swe
Home address:
Lync note: Holiday, Back: 8-18-2014
PhoneHome:
Mail: Carolina.Wester@competella.com

Example 2: Search for last name and first name

The screenshot shows a search result for the keyword 'w d'. The search bar contains 'w d' and the 'Keywords' tab is selected. Below the search bar, there is a table with columns: Status, Back, Phone, Name, Title, Organization, Mobile, Keywords, Mail Address, and Act. The table contains one row: Status: Holiday, Back: Monday 8:00 AM, Phone: (empty), Name: Carolina Wester, Title: Account Manager, Organization: Sales Swe, Mobile: (empty), Keywords: (empty), Mail Address: Carolina.Weste, Act: (empty). Below the table, there is a section for the selected user, Carolina Wester, with a profile picture and contact information: Organization: Sales Swe, Home address: (empty), Lync note: Holiday, Back: 8-18-2014, PhoneHome: (empty), Mail: Carolina.Wester@competella.com.

Example 3: Search for last name and organization

The screenshot shows a search result for the keyword 'wes sale'. The search bar contains 'wes sale' and the 'Keywords' tab is selected. Below the search bar, there is a table with columns: Status, Back, Phone, Name, Title, Organization, Mobile, Keywords, Mail Address, and Act. The table contains one row: Status: Holiday, Back: Monday 8:00 AM, Phone: (empty), Name: Carolina Wester, Title: Account Manager, Organization: Sales Swe, Mobile: (empty), Keywords: (empty), Mail Address: Carolina.Weste, Act: (empty). Below the table, there is a section for the selected user, Carolina Wester, with a profile picture and contact information: Organization: Sales Swe, Home address: (empty), Lync note: Holiday, Back: 8-18-2014, PhoneHome: (empty), Mail: Carolina.Wester@competella.com.


Search – Same Organization

By selecting a user in a search result list and pressing **F10** you will search for other users belonging to the same organization.

Search – Same Skill (keyword)

By selecting a user in a search result list and pressing **F11** you will search for other users having the same skill (keyword).

Show Organizational List




Show the organizational list by pressing **Alt** + **F6** or by clicking the  symbol.

The screenshot shows the organizational list. The search bar contains 'Search or dial' and the 'Keywords' tab is selected. On the left, there is a tree view showing the organizational structure: Active Solution, Competella, DemoUsers, External, New Learning, and Wecan. The main area displays a table with columns: Organization, Status, Back, Phone, Name, Title, Organization, Mobile, Keywords, Mail Address, and Activity info. The table contains multiple rows of user information, including names like Lennart Bauer, Andreas Browall, Anders Dahl, Kjell Johansson, José Oyarzun, and Eva Sundin, along with their titles, organizations, and contact details. The status of each user is also indicated (e.g., Offline, Inactive, Available).

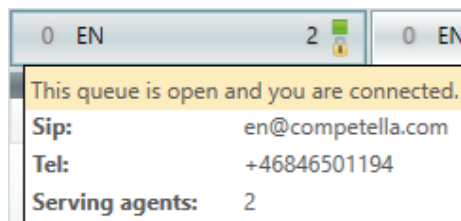
Call Control

Queue and Agent Functions

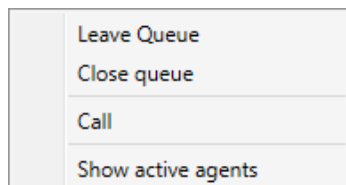
The color of the queue button indicates the following.

-  The queue is open
-  The queue is open but there are no available agents
-  The queue is closed

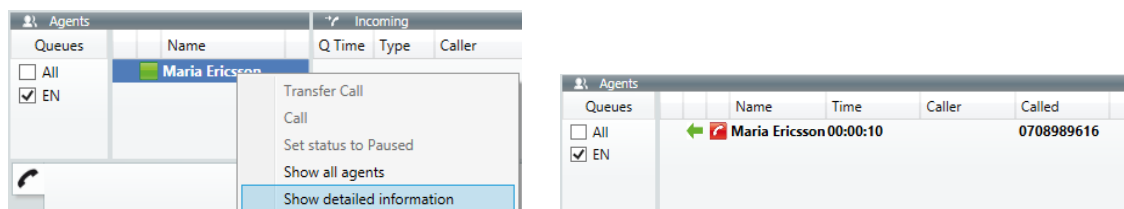
Click on a queue to display queue endpoint info.



Right-click on a queue to leave or close the queue (requires special permissions), to call the queue, or to display a list of servicing agents for the queue.



Right-click on an agent and select **Show detailed information** to see information about who the agent talks to and for how long.

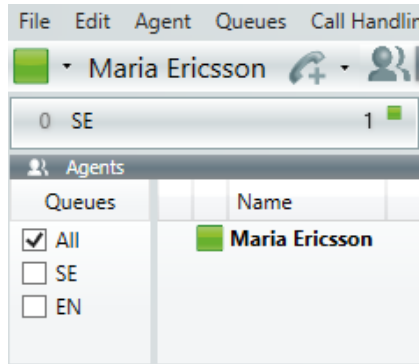


Show List of Servicing Agents per Queue

It is possible to display a list that shows the servicing agents for each queue.

You can enable this function by right-clicking a queue button for an incoming queue and selecting **Show active agents**.

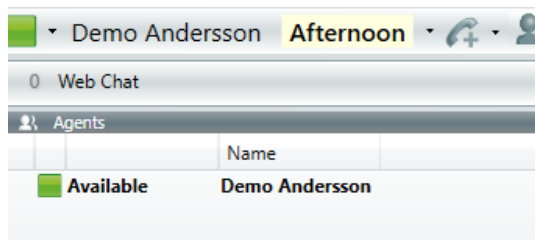
The list is displayed to the left of the active agents list.



You can choose which queues to show active agents for by ticking the checkboxes.

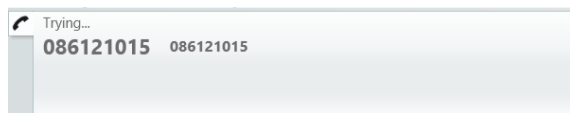
Select Profile

If profiles are set up by the administrator of the system you can select profile from the call control toolbar. Profiles can be used to define membership in different queues and different priorities in the queues to be used in different work situations.

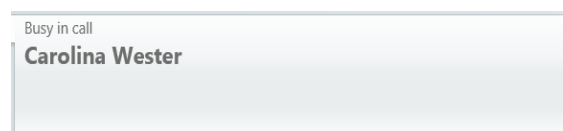


Make Outgoing Calls

To call a number, enter the number in the **Search or dial** field and press or to dial.



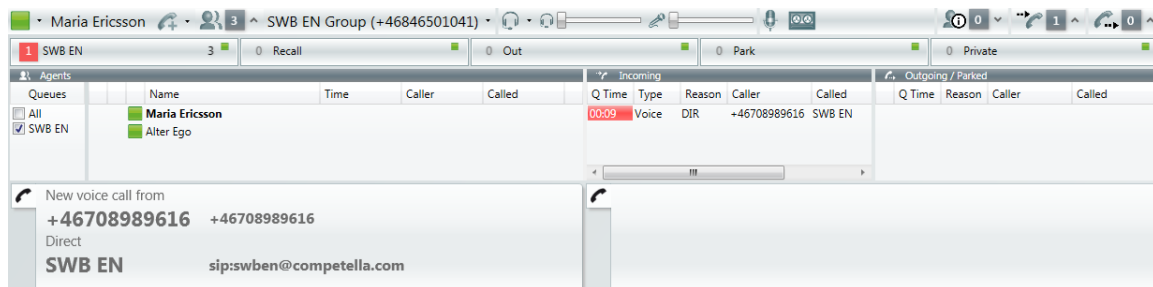
Instead of entering a phone number or Trams address it is possible to make a directory lookup by entering a keyword in the search field. Select a user and press or to dial it. If the called person is a Teams user is busy in a call, you will be notified in the left field:



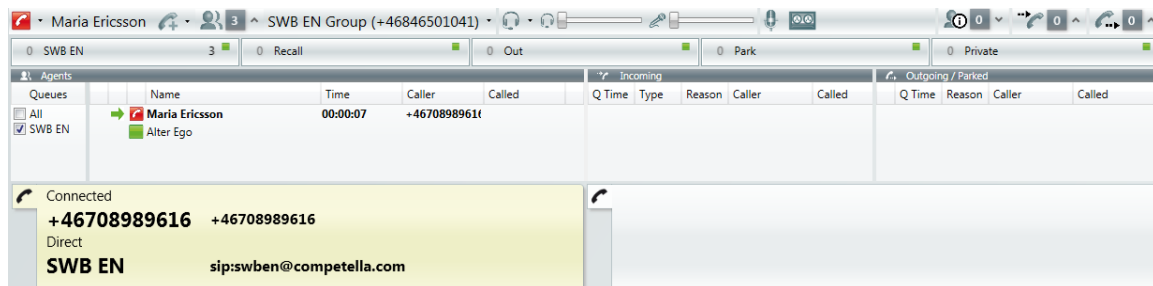
To hang up, press *.

Answer a Call in Queue – No Call Transfer

When a call comes into a queue the Multimedia Agent Server will assign the call to an available agent. There will be a ring signal in the headset and the following window will be displayed:



To answer the call, press Enter.

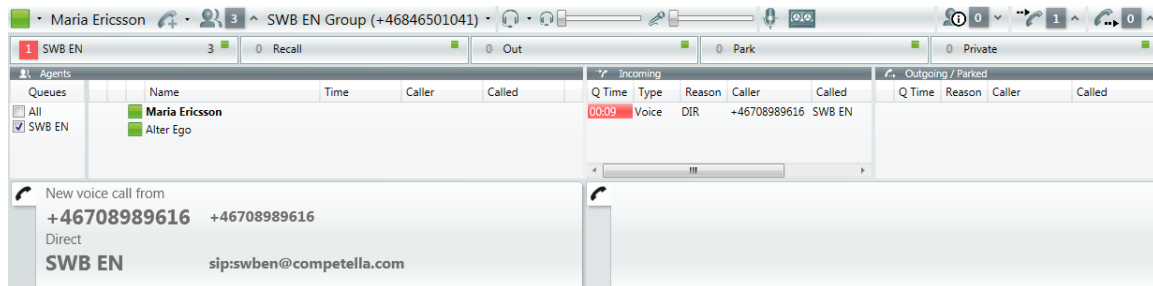


If the number is registered in the Competella database you will see the caller information, otherwise you will just get the number of the caller displayed.

To hang up, press *.

Answer a Call in Queue – Blind transfer

When a call comes into a queue the Multimedia Agent Server will assign the call to an available agent. There will be a ring signal in the headset and the following window will be displayed:



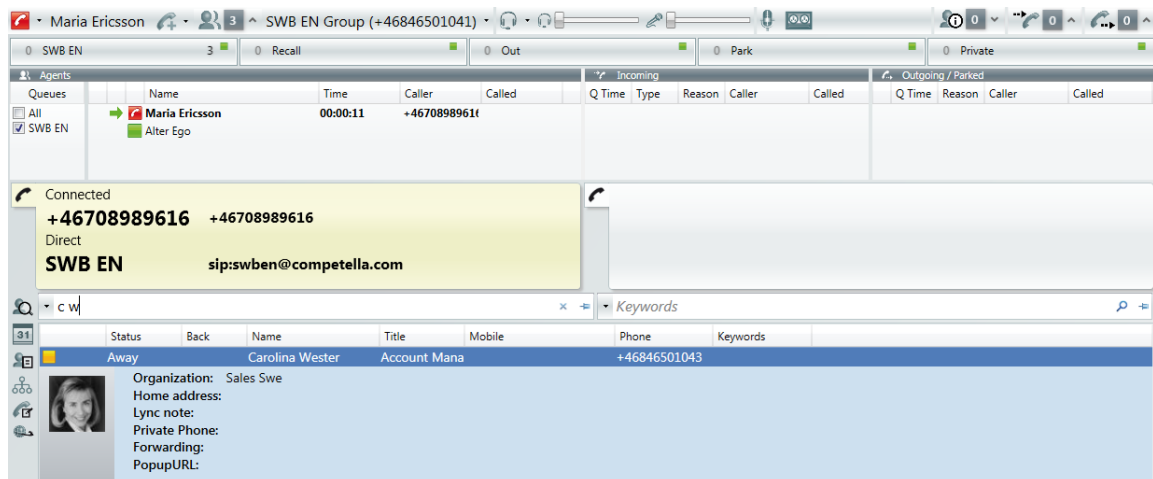
To answer the call, press .

A blind transfer can be initiated in two ways:

- Transfer the call by using the directory
- Direct entering the destination number or Teams address (UPN User Principal Name)

Transfer the Call Using the Directory

When you are connected to the caller (displayed in the left call field), do a directory lookup of the person to transfer to by entering a name (or parts of a name) in the **Search or dial** field. The following window will be displayed.



Select the person to transfer to in the search hit list by using the up and down arrow buttons (or by clicking).

Press or to dial. The call will be transferred and the agents will be disconnected automatically.

If a Teams user has activated forwarding the agent will be notified in the right call field, press




or




again to breakthrough and transfer the call. The call will be moved to the outgoing queue list.

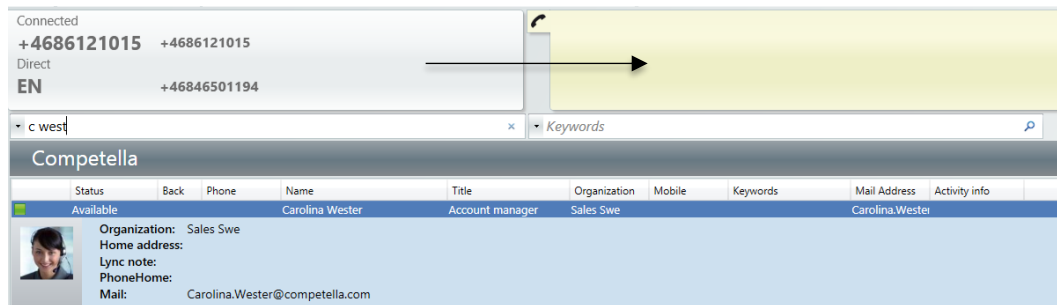
The agent can take the call back (before the call has been answered) by double-clicking the call entry in the out queue list if not a padlock symbol is displayed.






To explicitly dial the user's mobile number stored in the database, press . The call will be transferred and the agent is disconnected automatically. The call will also be moved to the outgoing queue list.

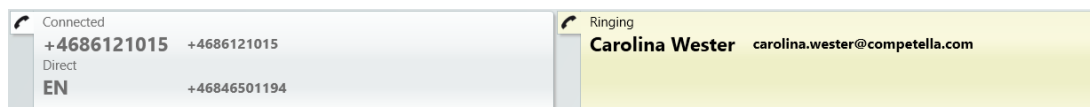
Answer a Call in Queue – Consult Transfer


It is sometimes necessary to call the searched person before transferring the call.

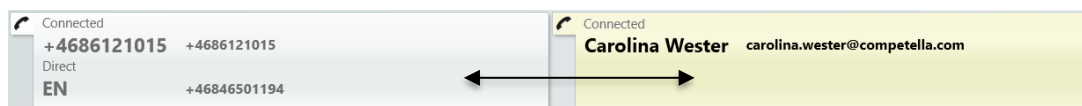
Press  to put the caller on hold (the right call field will be highlighted).




Press  or  to dial a selected user in the search list or enter a number or sip-address in the **Search or dial** field and press . If a Teams user has activated forwarding the agent will be notified in the right call field, press  or  again to breakthrough and dial.





When the called person has answered it is possible to toggle between the calls in the left and right fields by pressing .

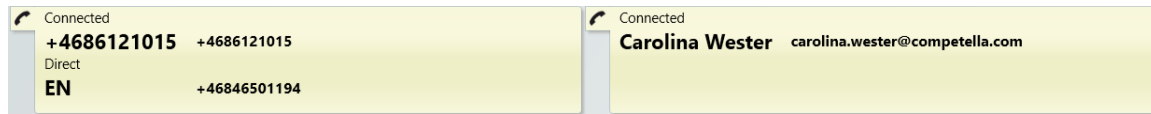



The part not connected to the agent will be put on hold (not highlighted).


Press  to connect the both parties and release the agent console.

Three-Party Conference

It is possible to set up a three-party conference by pressing  + .

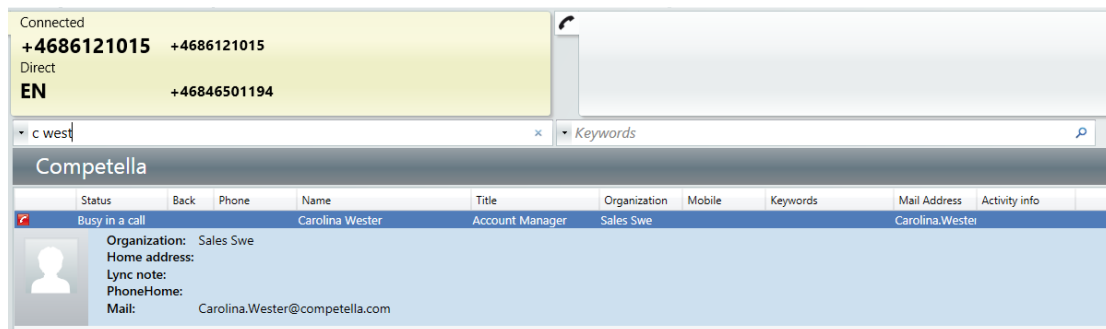


Press  to disconnect the part in the right call field.


Press  to connect the both parties and release the agent console.

"Camp on Busy" (Queue Call to Wait for a Busy Destination)

The call is answered as described in previous chapters but in this example we assume that the searched user is busy in a call. The presence information is displayed as a standard presence icon together with a status text, "Busy in a call".



If the caller wants to wait for the busy user:

Press . The info for the called user will be presented in the right field.

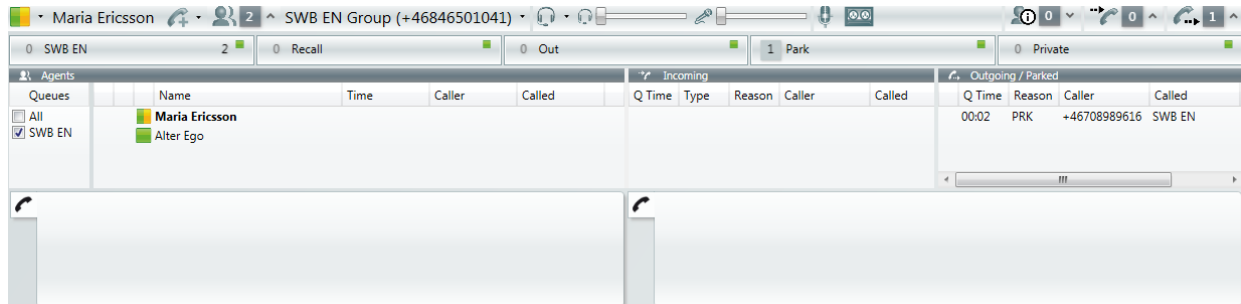
The agent is free to answer new calls. The waiting caller will hear music on hold and can be reverted to the agent automatically after a configurable timeout.

Call Park

A connected incoming call can be temporarily parked to make the agent free to for example answer or to make another call.

Answer the call. Press **Home** to park the call in the common queue, or press **Alt** + **Home** to park the call in the private queue.

The call will be displayed in the outgoing/parked queue list with the type PRK (park). The caller will get music on hold.




Pick-up a parked call by double-clicking the park queue button or select a specific parked call by double-clicking the call entry in the outgoing queue list.

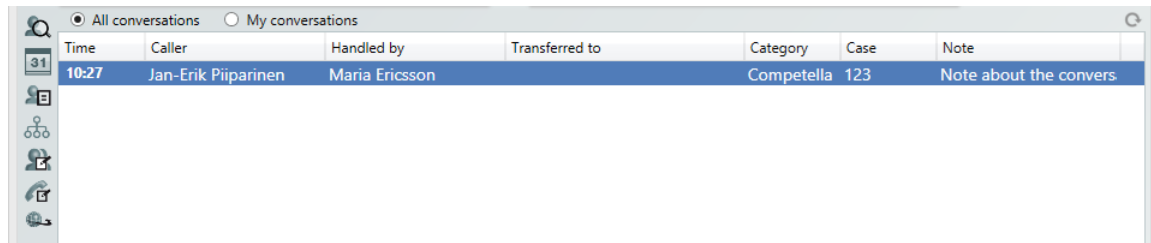
Conversation Log

You can configure the application so that you are able to enter a note about the call when finishing it. The log entry window appears automatically when finishing a call.

The screenshot shows a dialog box titled 'New conversation log entry'. It has a 'Category' dropdown menu set to 'Competella Support'. Below it is a 'Case' text field with the value '123'. There is a 'Note' section with a text area containing the text 'Note about the conversation'. At the bottom right of the dialog is a 'Save' button.

The notes are then stored in the conversation log which can be viewed by clicking at the  icon. Old entries can be updated by selecting it in the conversation log, clicking on the

Conversation log menu and selecting Add log entry, or with **Alt** + **B**.

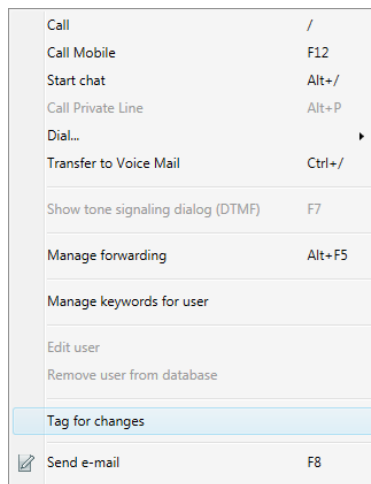


All conversations		My conversations		
Time	Caller	Handled by	Transferred to	Category
10:27	Jan-Erik Piiparinen	Maria Ericsson		Competella
				123
				Note about the convers

Information on how to configure the function can be found on page 54.

Monitor List

You can set a user on the monitor list, for example to check when the user turns free. Lookup the user in the directory, right-click and select **Tag for changes**.



To remove an entry in the list, right-click and select **Remove from List**.

Calendar, Activities and Forwarding

Activities

To enter an activity, lookup the user in the directory, right-click and select **Set Activity** or press

F9

Set activity for Carolina Wester

Activity: Holiday Start time: 6/19/2014 11:08 Return time: 6/19/2014 12:08 Save (Ctrl+Enter) Cancel

Enter the activity details and press **Save**.

To remove an activity, right-click and select **Remove Activity** or press Ctrl + F9.

View Calendar

A user's calendar information is automatically fetched from the Exchange server and presented in the calendar view when an agent answers a redirected incoming call. To manually show the calendar view, lookup the user in the directory, right-click and select **View Calendar** or press

F5.

Carolina Wester
Back tomorrow 12:08 PM
Holiday

Title: Account Manager
Mail: Carolina.Wester@comp
Organization: Sales Swe
Home address:
Lync note: Holiday, Back: Friday
PhoneHome:

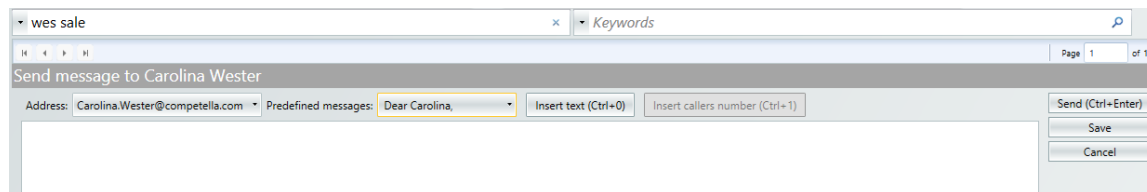
Day	Week	Work week	Month	Timeline
16 Monday	17 Tuesday	18 Wednesday	19 Thursday	20 Friday
10:00 AM		Meeting		
11:00 AM				
12:00 PM				
1:00 PM				
2:00 PM				

The following presentation views can be selected: day, week, month and timeline. The system will automatically show the "Return time" from the calendar if there is no activity manually entered.

Messages

Send E-mail

To send an e-mail, lookup the user in the directory and press **F8**.



Enter the message and press **Send**.

You can save a message for later use with the **Save** button. To use a saved message click on the

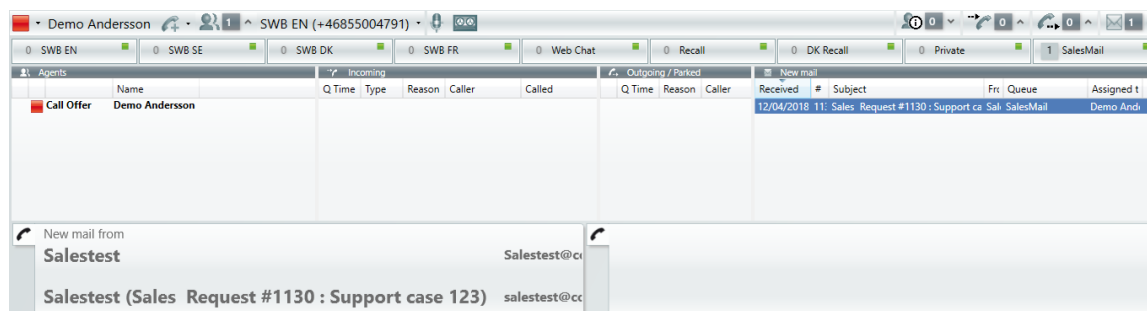


symbol and select it.

E-mail Queues

E-mail queues look the same and have the same basic functionality as call queues in terms of that you can for example leave a queue and see how many agents are servicing a queue, etc. This is described in page 15 and forward.

When an e-mail message arrives to the mail queue it is presented to any of the free agents. The selected agent will receive a message in the left field as in the figure below.



By pressing **Enter** you will open the e-mail message. You can also choose to reject it by

clicking ***** or by right-clicking and select Reject Call. The e-mail message will then be presented to another free agent in the queue. If you reject an incoming e-mail and would like to read the message later, you cannot do so in Multimedia Agent; you need to read it in your e-mail client.

Info Messages

An info message is a message the user can set to give more information about his/her absence. You as an agent can also enter this message. To enter an info message, lookup the user in the

directory, right-click and select **Set Info** or press Ctrl + F8.

The screenshot shows the Competella Multimedia Agent interface. At the top, there is a status bar with fields: Status (Away), Back, Phone, Name (Carolina Wester), Title (Account Manager), Organization (Sales Swe), Mobile, Keywords, Mail Address (Carolina.Wester), and Activity info. Below this, a user profile card for Carolina Wester is displayed, showing her organization (Sales Swe), home address, Lync note, phone home number, and email (Carolina.Wester@competella.com). Below the profile card, a dialog box titled 'Set info for Carolina Wester' is open. It contains a text input field with the text 'Works from home today' and two buttons: 'Save (Ctrl+Enter)' and 'Cancel'.

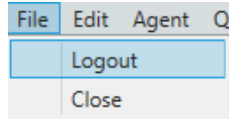
Press **Save** to save the message.

To remove an info message, right-click and select **Remove Info** or press Alt + F8.

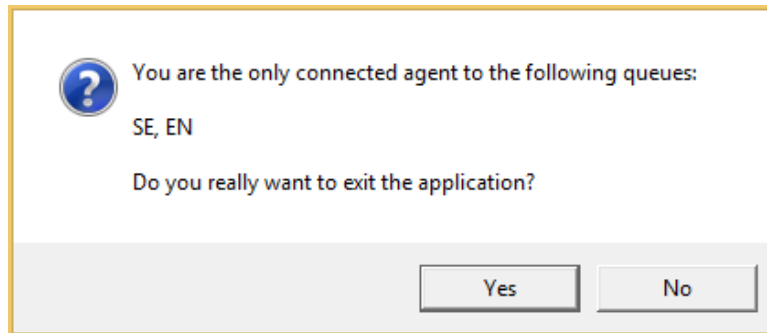
Appendix 1. Dropdown Menus

File Menu – Logging Out and Closing

Click **File** and select **Logout** or **Close**.



If you are the only logged in agent on a queue you will have to confirm that you want to exit.



The login window will be displayed.

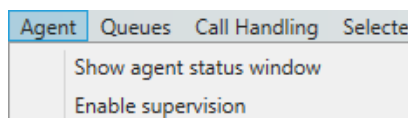
Edit Menu – Change Settings

To change settings, select **Settings** in the **Edit** menu. For more information about all the setting options, see page 35.

Agent Menu

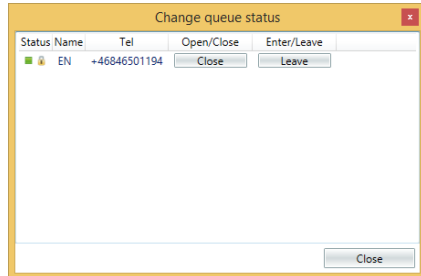
Show Agent Status Window

Show a list of all agents and their status by selecting **Show agent status** in the **Agent** menu.

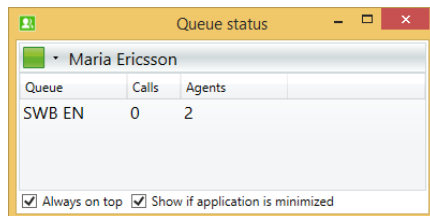


Queues Menu – Change Queue Status and Show Queue Status Window

You can change the status of a queue and leave a queue by selecting **Change queue status** in the **Queues** menu.

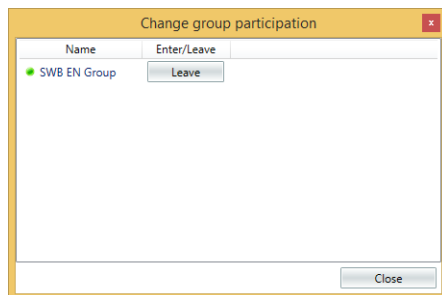


Show the queue status window by selecting **Show queue status window** in the **Queues** menu.



Groups Menu

You can change which groups you participate in by selecting **Change group participation** in the **Groups** menu.



Call Handling Menu

Under the **Call Handling** menu you can find many of the available functions to use when handling a call. Most of them also have quick commands, see page 33 for a list of all quick commands.

File	Edit	Agent	Queues	Groups	Call Handling	Selecte
					Answer Call	Num Enter
					Reject Call	
					Disconnect Left	*
					Disconnect Right	-
					Toggle Left / Right	+
					Call User	/
					Dial...	
					Call Mobile	F12
					Start chat	Alt+ /
					Call Private Line	Alt+ P
					Transfer to Voice Mail	Ctrl+ /
					Park Call	Home
					Park Call in private queue	Alt+ Home
					Park Call in Lync	Ctrl+ Home
					Break through	Ctrl+ Num Enter
					Show tone signaling dialog (DTMF)	F7
					Record Call	Ctrl+ R
					Merge into call	
					Show Call Log	Alt+ F10

Conversation Log Menu

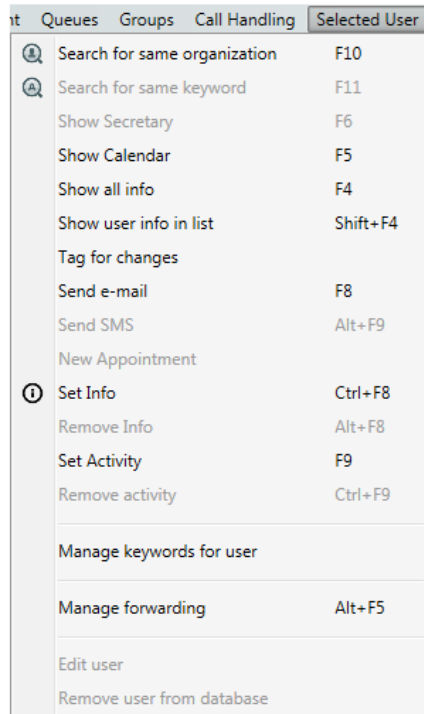
Add log entry can be selected to add information to an existing, selected log entry.

Show log views the conversation log on the lower part of the screen.

Settings... takes you to the conversation log setting page, see page 54.

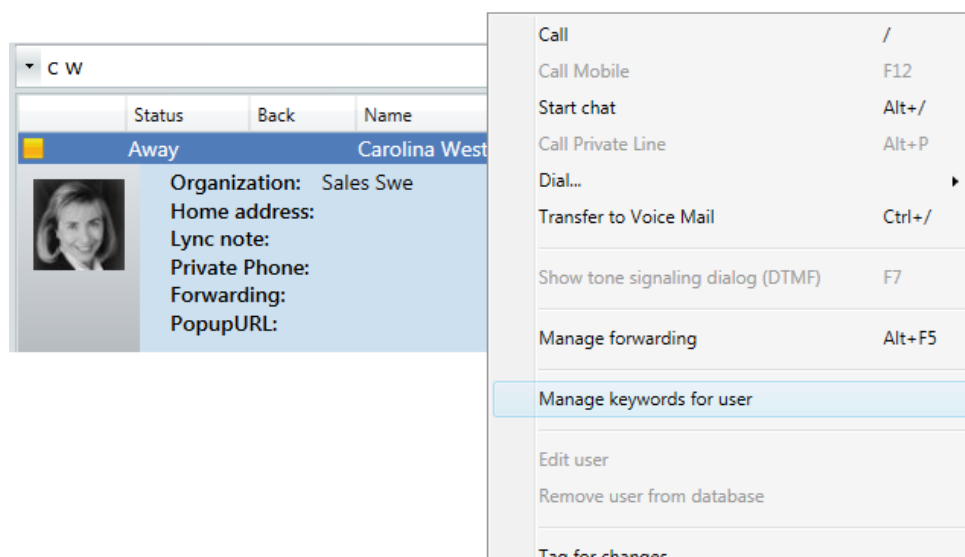
Selected User Menu

Under the **Selected User** menu you can find many of the available functions to do for the user selected in the search result list in the lower part of the screen. Most of them also have quick commands, see page 33 for a list of all quick commands.

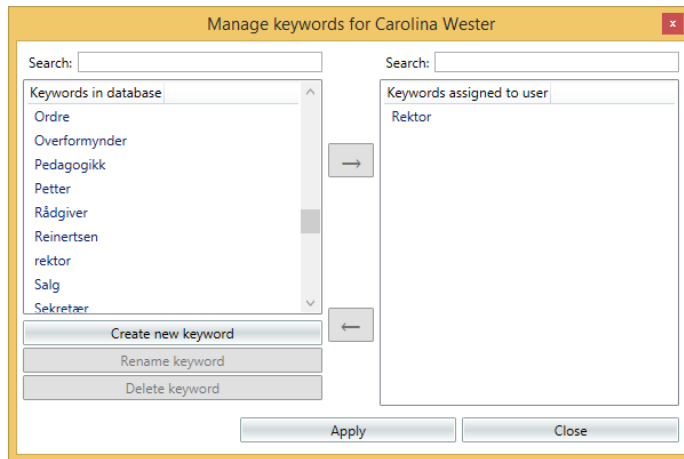


Manage Keywords for Users

As an agent you can add, change or remove keywords for a user. Search for a user and select it. Right-click and select **Manage keywords for user**.



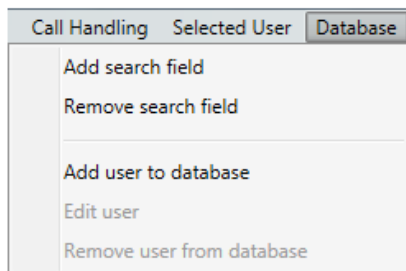
In the following window you can select which keywords shall be set for the user. You can select from the predefined list or create new ones. Change by clicking **Apply**.



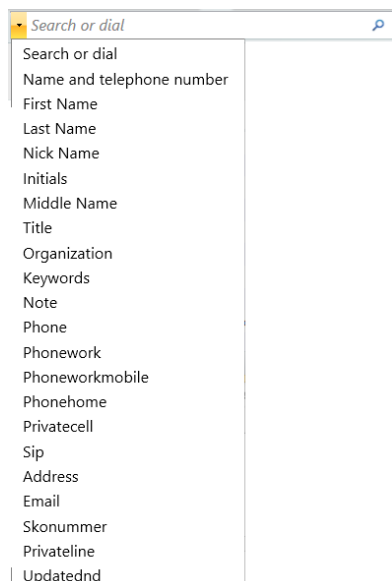
Database Menu

Add/Remove Search Field

The default setting is that you have two search fields in the lower part of the screen, one for all fields, and one for keywords. You can add more fields by selecting **Add search field** in the **Database** menu. More about searching can be found on page 13 and forward.



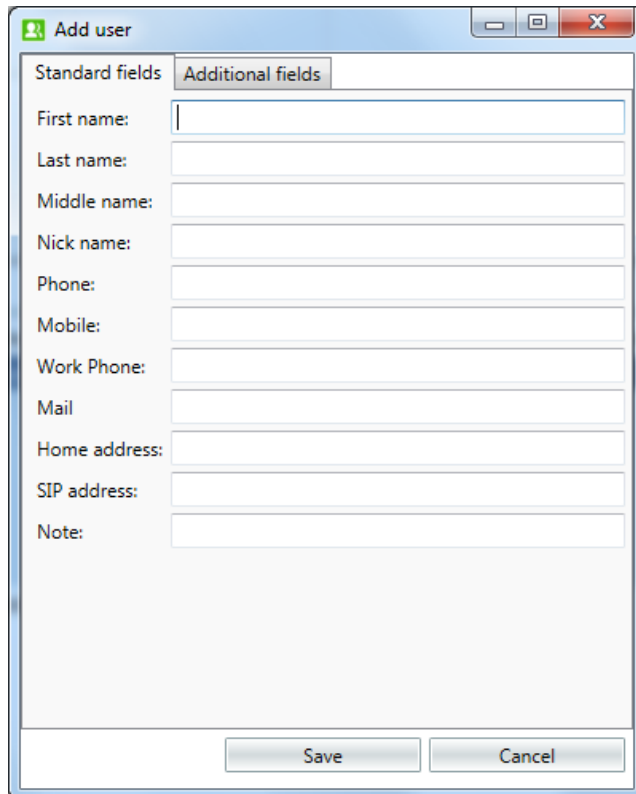
Then you can select the type of field you want to add in the drop down list. After you have added fields you can combine searches in a more refined manner.



To remove search fields select **Remove search field**.

Add User to Database

You can add users to the database by selecting **Add user to the database** in the **Database** menu.



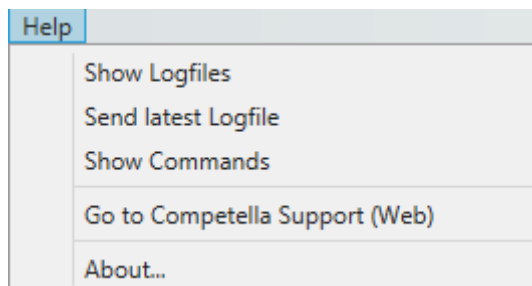
Fill in the appropriate fields and click **Save**.

You can edit or remove users that you have created with the options **Edit user** and **Remove user from database**.

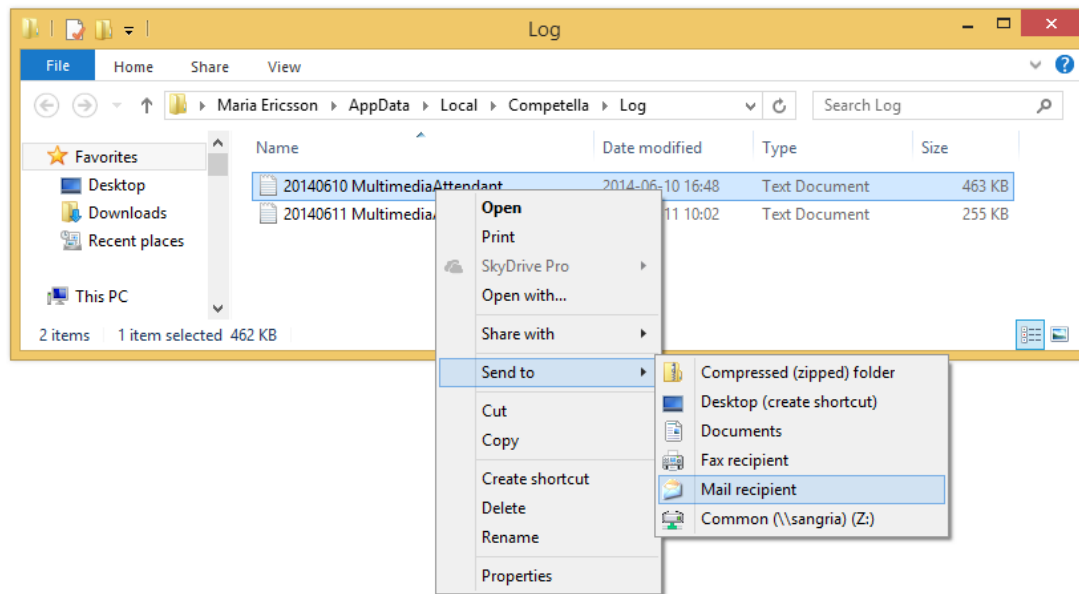
Help Menu

Show Logfiles and Send Latest Logfile

To show the available log files click **Show Log files** in the **Help** menu.



To e-mail a log file to Competella, right-click the file, then select **Send to** and **Mail recipient** if an e-mail client is available, for example Microsoft Outlook.



If SMTP is open for the client, the function **Send latest Logfile** in the **Help** menu can be used as an alternative.

Show Commands

To show a list of all commands and their shortcuts, select **Show Commands** in the **Help** menu. See also page 33 for a list of all quick commands.

Go to Competella Support Web

On the Competella Support Web you can get information and support about the Competella Multimedia Agent application. Select **Go to Competella Support (Web)** in the **Help** menu. You need a user name and password to log in.

About Competella Multimedia Agent

The about-box shows information on connected servers and program versions. Select **About...** in the **Help** menu.

Appendix 2. Quick Commands

To display a list of available functions click **Show Commands** in the **Help** menu. Stickers to put on the keyboard buttons are provided.

General Commands

Increase font size	Ctrl + I
Decrease font size	Ctrl + O
Show call log	Alt + F10
Toggle agent window	Ctrl + F2
Toggle agent details	Shift + F2

Call Handling Commands

Retrieve parked call	Shift + Home
Answer call	Enter (numerical keypad)
Transfer	Enter (numerical keypad)
Dial	/ (numerical keypad)
Dial users mobile	F12
Disconnect Left (A party)	* (numerical keypad)
Disconnect Right (B party)	- (numerical keypad)
Call park	Home
Call park, private	Alt + Home
Set agent status	F2

Show call log	Alt + F10
Select a call from the queue list	Double-click an entry in the queue list
Three-party conference	Ctrl + + (numerical keypad)
Set dual ringing number	Alt + F2
Transfer to agent dialog	Ctrl + A
Edit conversation log	Alt + B

Search / Directory Commands

Search, same organization	F10
Add user to tag for changes list	Right click on entry in the search hit list
Remove user from tag for changes list	Right click on entry in the search hit list
Search, same keyword (skill)	F11
Show info for selected user	F4 or Alt + F3
Show secretaries	F6
Show organization list	Alt + F6
Set info message	Ctrl + F8
Remove info message	Alt + F8
Previous search	Alt + R
Show user info in list	Shift + F4
Toggle search field	F3
Reset search field	Ctrl + F3

Message Commands

Send e-mail	<div>F8</div>
-------------	---------------

Send SMS text message	<div>Alt</div> + <div>F9</div>
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Activity Commands

Set activity	<div>F9</div>
--------------	---------------

Remove activity	<div>Ctrl</div> + <div>F9</div>
-----------------	---------------------------------

Show calendar for selected user	<div>F5</div>
---------------------------------	---------------

Appendix 3. Manage Settings

To change settings select **Settings** in the **Edit** menu.

User Interface – General

The screenshot shows the 'Settings' dialog box with the 'User Interface' tab selected. The 'General' section is expanded, showing the following settings:

- Display language:** English (United Kingdom)
- Default country:** United Kingdom
- ☐ Activate on incoming call
- ☒ Clear screen on call termination
- ☒ Show icon in taskbar
- ☒ Save Window Position and Size
- ☐ Minimize window when using the close box
- ☒ Ask if only active agent on setting paus mode
- ☒ Ask if last agent on exit
- ☒ Ask if active call on exit
- ☐ Allow call handling when handling messages, activities and meetings
- ☐ Hide offered call in list of incoming calls
- ☐ Show call information
 - ☒ Show answered calls
 - ☒ Show answered mails
 - ☐ Show outgoing calls
 - ☐ Show transferred calls
- ☐ Agent status window always on top
- ☒ Queue status window always on top
- ☐ Automatically show queue status window
- Name display format:** First name Last name
- Name separator:** (empty text field)
- Trace level:** Normal

Buttons at the bottom: OK, Cancel, Save as default. A 'Restore' button is also present next to the 'Save Window Position and Size' option.

Display language

Select the display language of the application.

Default country

Select the default country. Used for default national extensions. See also User Interface – Extension Format on page 42.

Activate on incoming call

Bring the application to front when a call is offered.

Clear screen on call termination

Remove search information after hang-up.

Show icon in taskbar

Right-click the application icon to set status, settings, and to activate the application.



Save Window position and Size

When the application is started restore the last window position and size.

Minimize window when using the close box

When clicking on the close box ("x") of the application, the window will be minimized instead of closed.

Ask if only active agent on setting pause mode

Display a warning message if the only active agent is about to set pause mode.

Ask if last agent on exit

Display a warning message if the only active agent is about to log out or exit.

Ask if active call on exit

Display a warning message if there is an active call when exiting.

Allow call handling when handling messages, activities and meetings

Currently not used.

Hide offered call in list of incoming calls

Hide offered call in list of incoming calls.

Show call information

Show information about call lengths and answered calls.

Current call
00:00:00
Previous call
00:00:00
Answered calls
0

Show answered calls

Show answered calls

Show answered mails

Show answered mails

Show outgoing calls

Show outgoing calls

Show transferred calls

Show transferred calls

Agent status window always on top

Always show the window with all agents and their statuses.

Queue status window always on top

Always show the window with all queues and their statuses.

Automatically show queue status window

Automatically show queue status window

Name display format

Selects how names should be displayed in the user interface, either “Surname - Last name” or “Last name - Surname”. Note that the surname and last name are separated using the name separator below.

Name separator

Selects which separator string should be used between surname and last name when displaying names in the user interface.

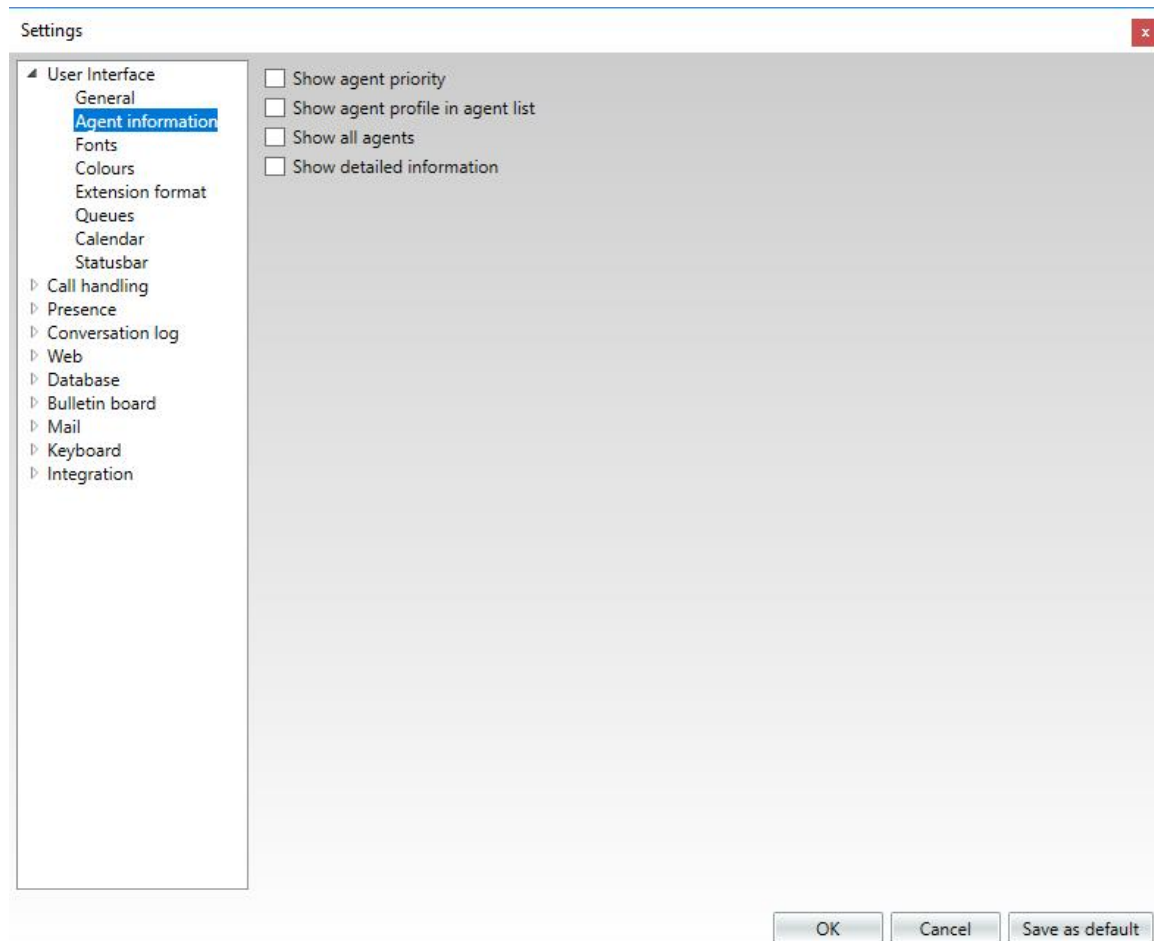
Trace level

Set the level of detail in the system logs.

Restore

Restore the default window size and position.

User Interface – Agent Information



Show agent priority

Show agent priority

Show agent profile in agent list

Show agent profile in agent list

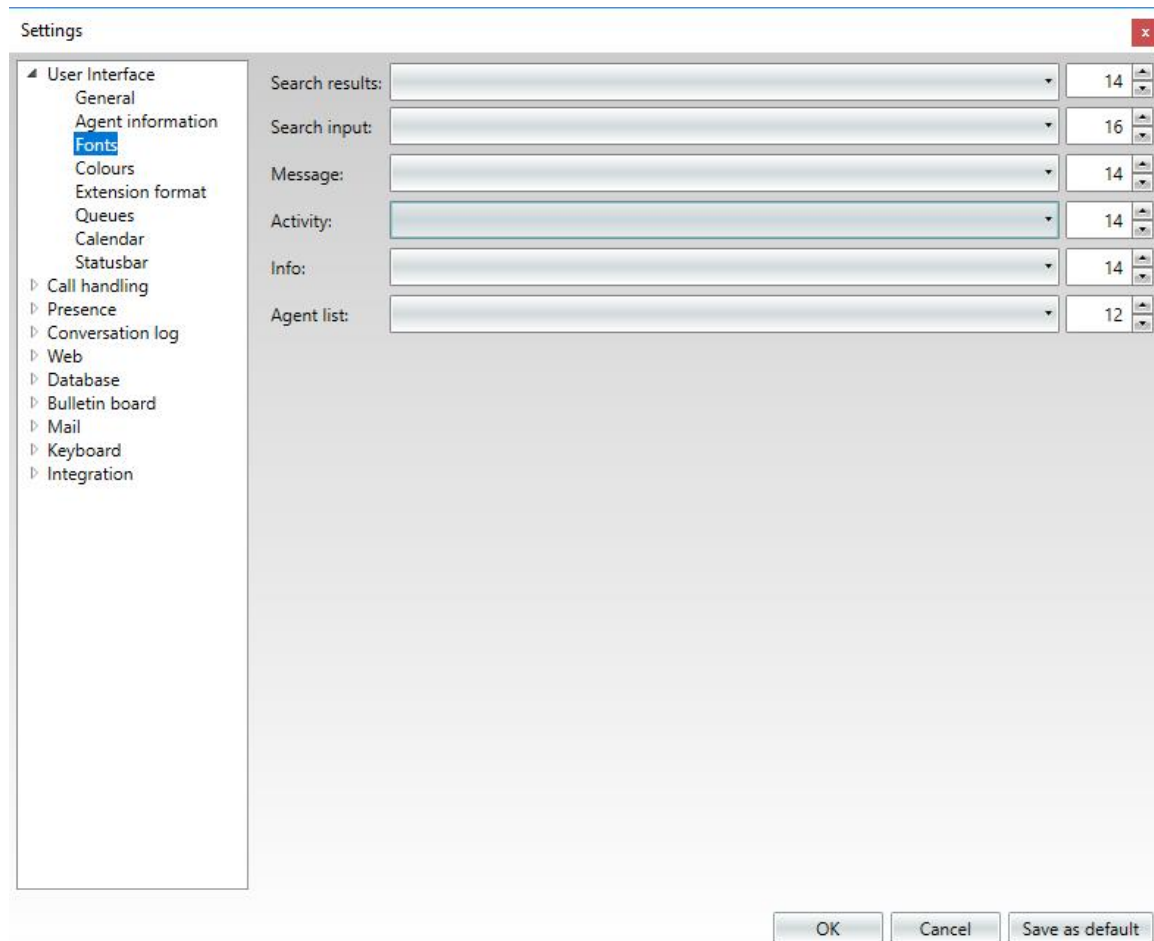
Show all agents

Show all agents

Show detailed information

Show detailed information

User Interface – Fonts



Search results

Selects which font will be used in the search result list.

Search input

Selects which font will be used in the search input box.

Message

Selects which font will be used in messages.

Activity

Selects which font will be used in activities.

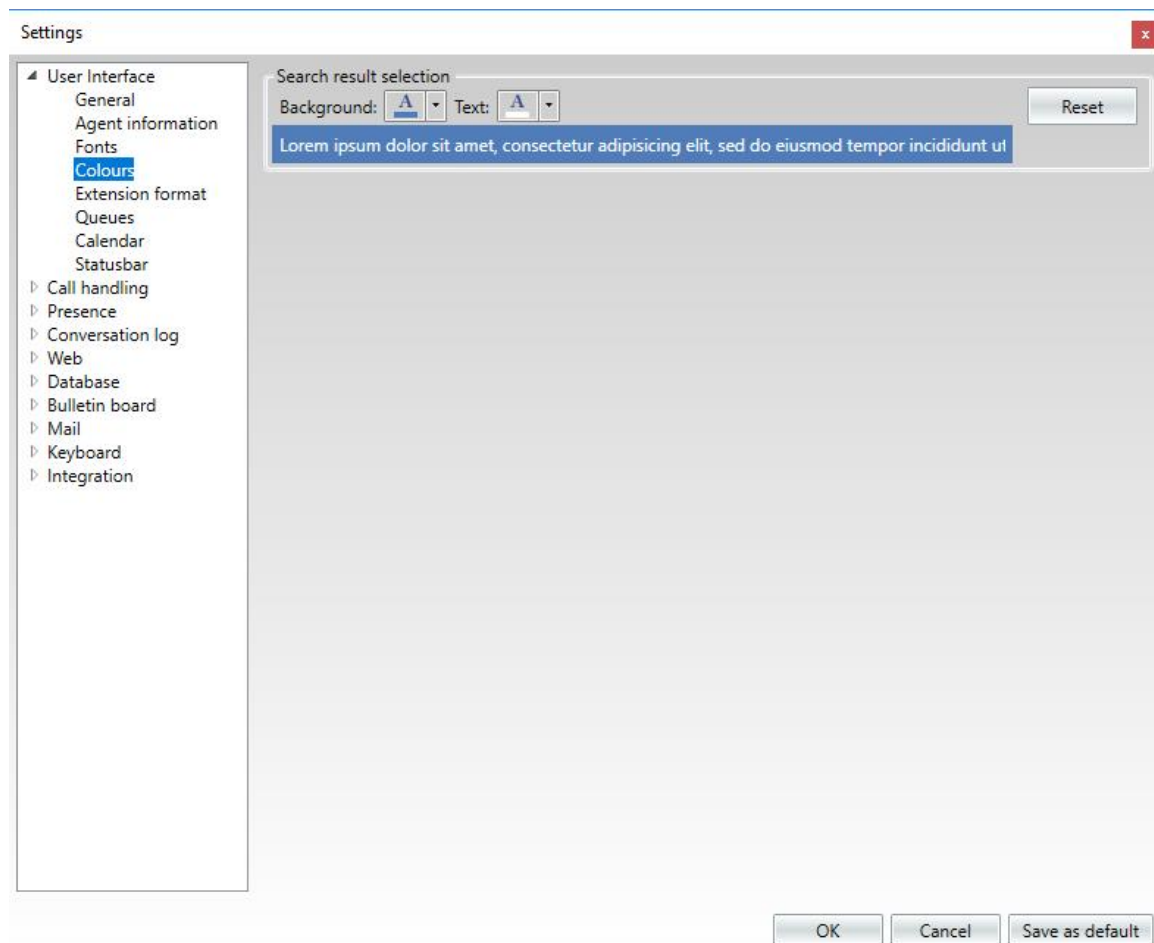
Info

Selects which font will be used in user info.

Agent list

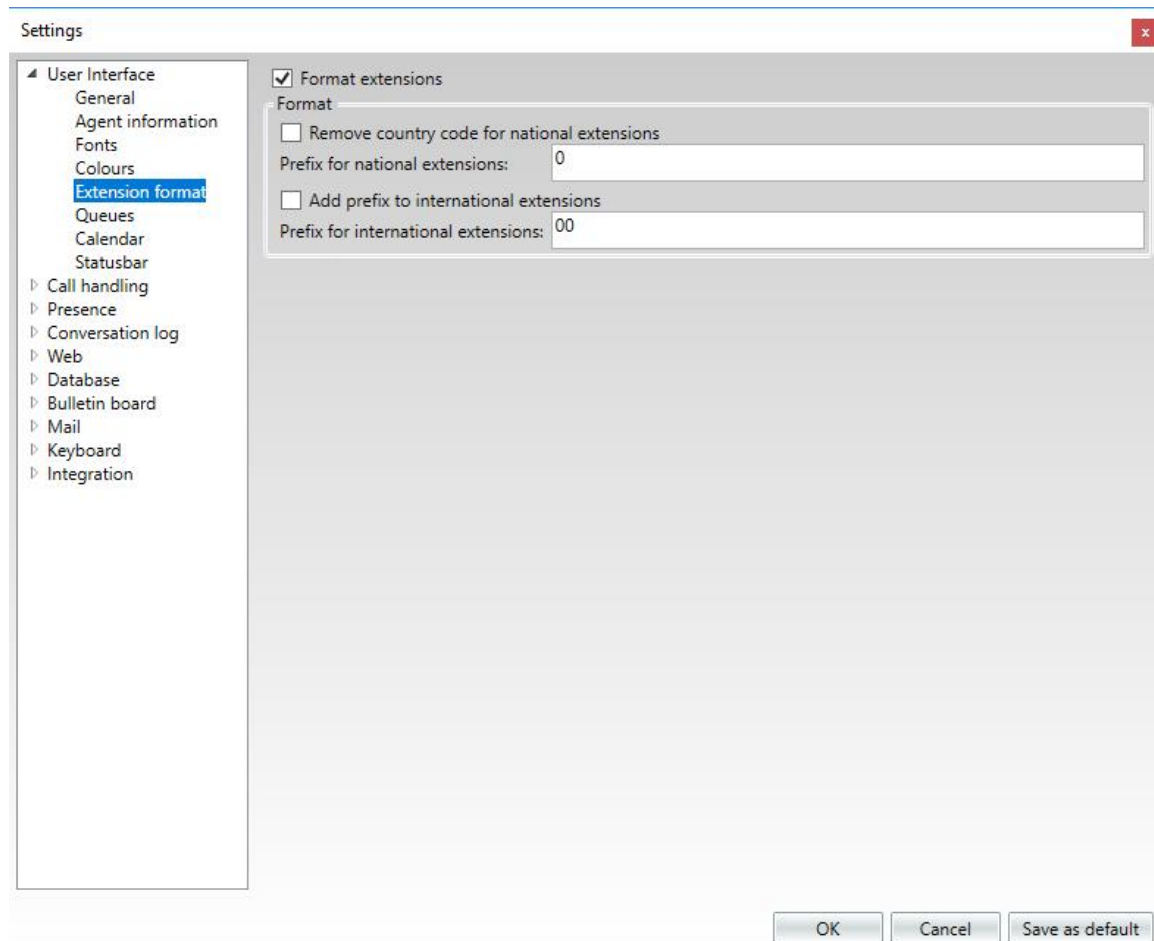
Selects which font will be used in agent list.

User Interface – Colours



Selects the color layout of search result selections.

User Interface – Extension Format



Format extensions

If checked, the extensions displayed in the user interface are formatted according to the settings on this page. Note that this only affects E.164 formatted extensions.

Remove country code for national extensions

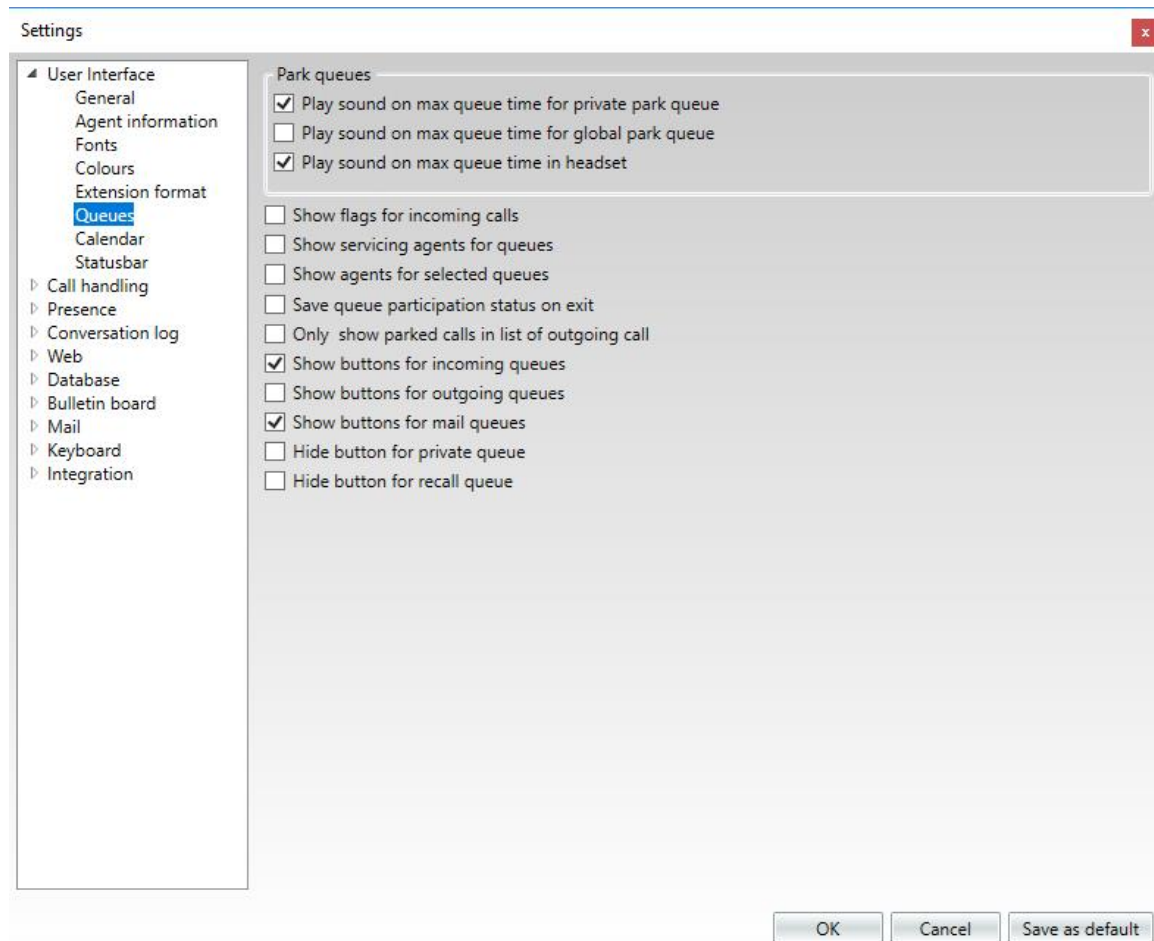
Remove the + prefix and country code for national extensions and optionally add the specified prefix. For example +44123456 become 0123456 if zero is selected as a prefix. Clear the prefix box if nothing should be added. This setting does only apply how the extension is displayed.

Add prefix for international extensions

If checked, removes the + from the beginning of E.164 formatted extensions and adds the prefix instead. For example +46812345 become 0046812345 if double zero is selected as a prefix.

Clear the prefix box if nothing should be added. This setting does only apply how the extension is displayed.

User Interface – Queues



Play sound on max queue time for private park queue

If selected, plays a sound to the agent if a call in the private park queue has reached the maximum waiting time.

Play sound on max queue time for global park queue

If selected, plays a sound to the agent if a call in the global park queue has reached the maximum waiting time.

Play sound on max queue time in headset

If checked, plays the max queue time sound in the headset as well as the speaker.

Show flags for incoming calls

Display flags in the incoming queue list to indicate preferred language.

Show servicing agents for queues

Determines if the number of active agents per queue is shown in each queue button.

Show agents for selected queues

Determines if the list of active agents per queue is shown or not.

Save queue participation status on exit

If checked, the participation status of the agent for each queue is saved on logout or exit and restored on login.

Only show parked calls in the list of outgoing calls

If checked, only parked calls are shown in the outgoing call list. If no parked calls are present, this list will be hidden.

Show buttons for incoming queues

If checked, queue buttons for incoming queues will appear at the top of the screen.

Show buttons for outgoing queues

If checked, queue buttons for outgoing queues will appear at the top of the screen.

Show buttons for mail queues

If checked, queue buttons for mail queues will appear at the top of the screen.

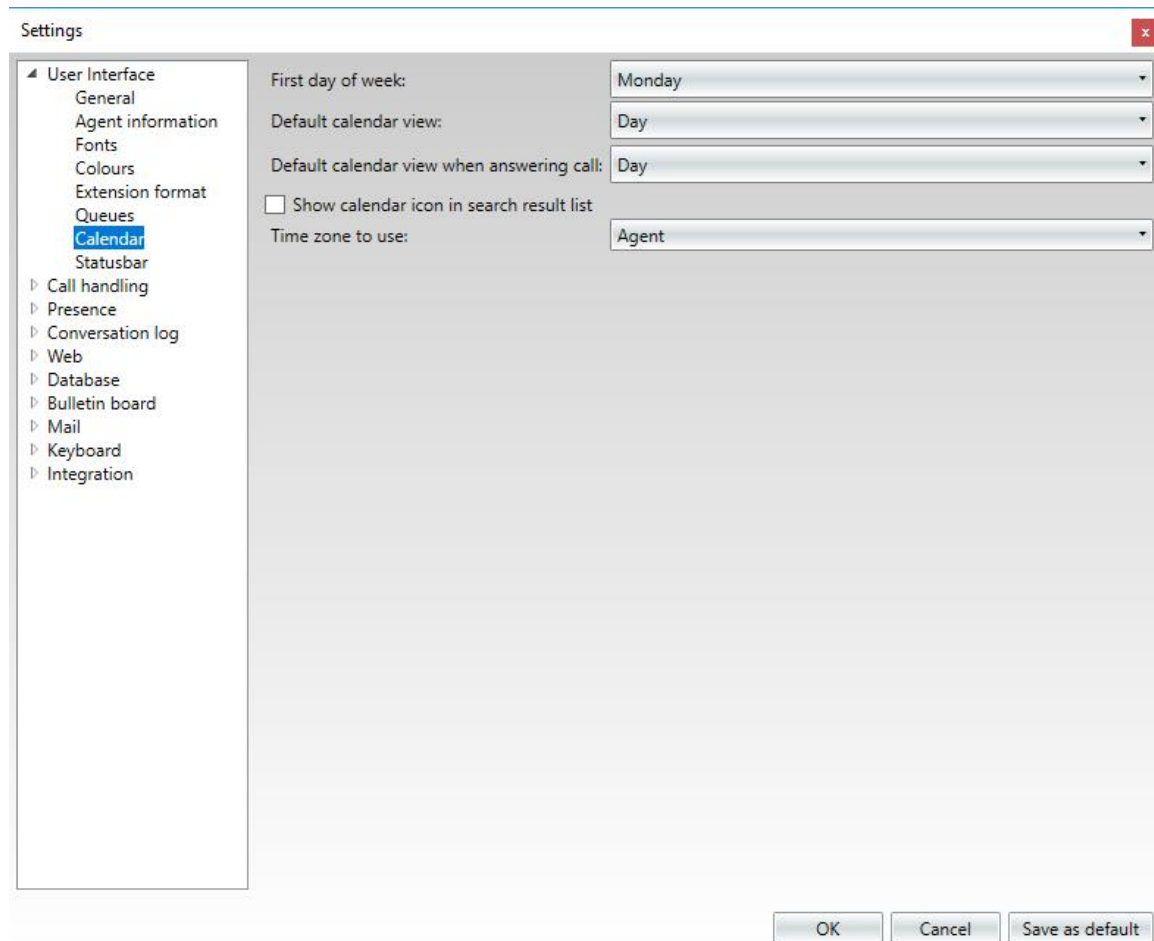
Hide button for private queue

If checked, the buttons for private queues will not appear

Hide button for recall queue

If checked, the buttons for recall queues will not appear

User Interface – Calendar



First day of week

Determines the day to display as the first day of the week in the calendar.

Default calendar view

Determines the default calendar view mode.

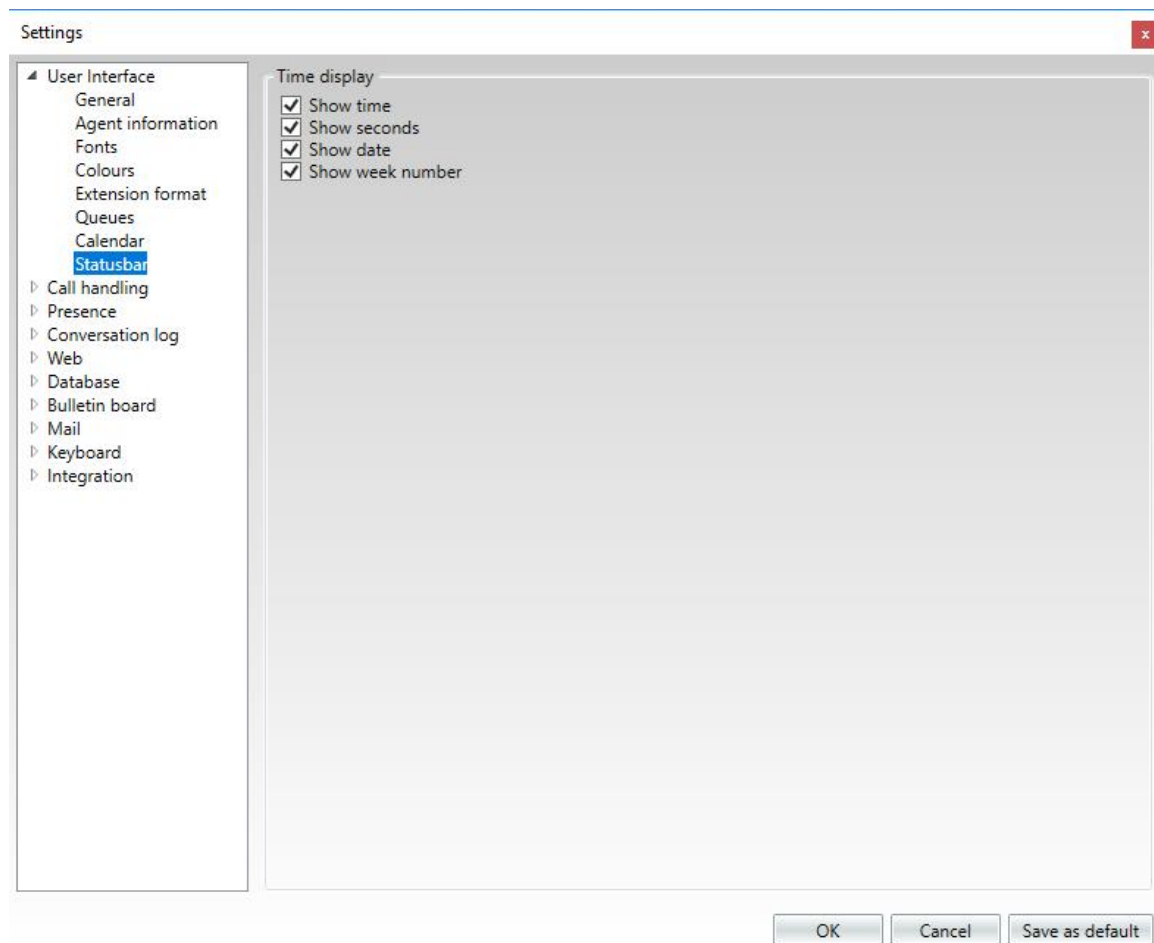
Show calendar icon in search result list

If checked, the calendar icon will be shown in search result lists.

Time zone to use

Select which time zone to use, the agent's or the user's.

User Interface – Status Bar



Show time

Determines if hours will be shown in the status bar clock.

Show seconds

Determines if seconds will be shown in the status bar clock.

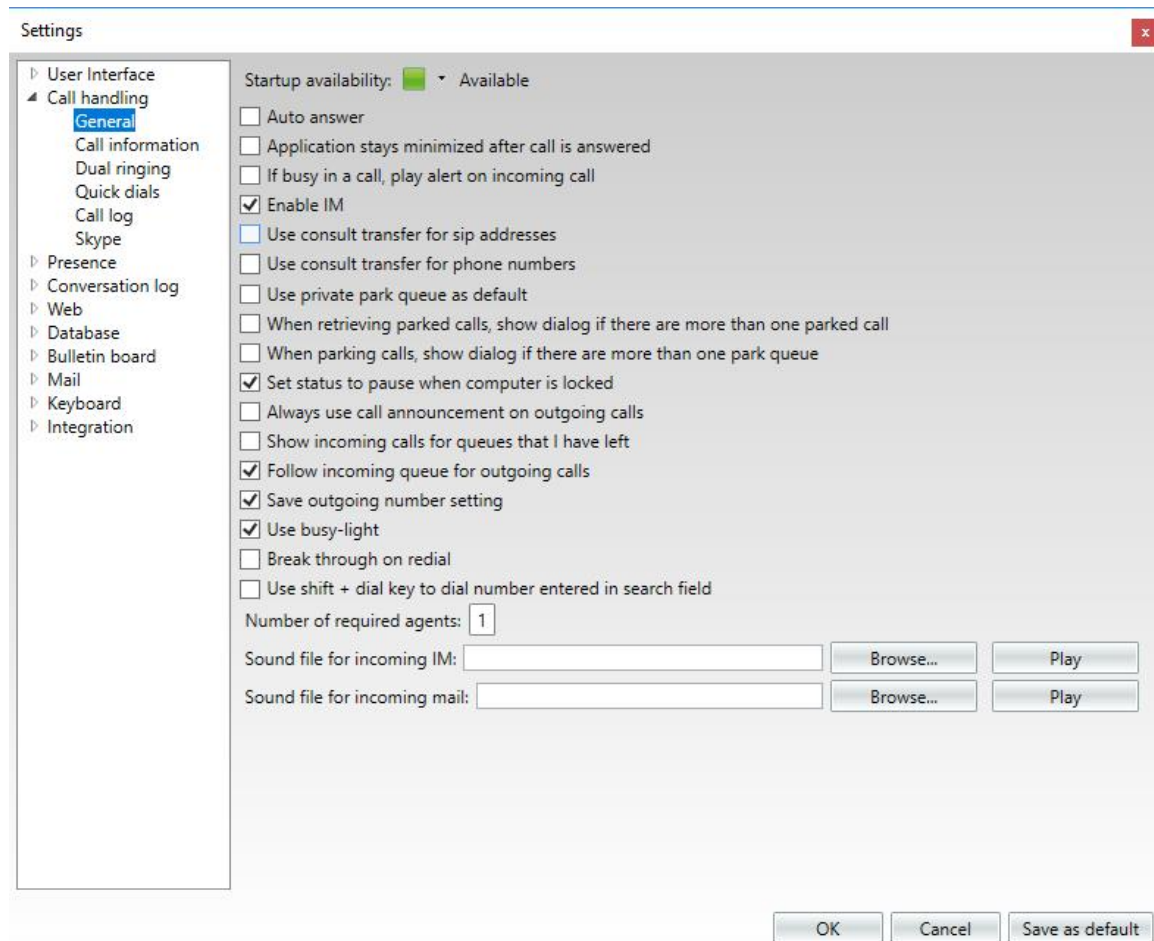
Show date

Determines if the current date will be shown in the status bar clock.

Show week number

Determines if the current week number will be shown in the status bar clock.

Call Handling – General



Startup availability

Select whether you are to be available or paused directly after startup.

Auto Answer

If checked, incoming calls are automatically answered by the application.

Application stays minimized after call is answered

Select if Multimedia Agent will stay minimized when answering a call in minimized state.

If busy in a call, play alert on incoming call

If checked, an alert is played in the agent headset if the agent is busy in a call and when a call new call is in the queue.

Enable IM

Determines if the agent should be able to handle incoming and outgoing IM (chat) sessions.

Use private park queue as default

If you park a call (Home key) the default behavior is that the call is put in the public queue.

With Alt + Home it is parked in the private queue. By checking this box, the behavior is switched.

When retrieving parked calls, show dialog if there are more than one parked call

If you retrieve parked call and there are more than one, the system by default retrieve the first parked call. With this box checked, the system asks which call you want to retrieve.

Set status to pause when computer is locked

Sets the agent's status to Paused when the computer is locked.

Always use call announcement on outgoing calls

Check to always use call announcement on outgoing calls.

Show incoming calls for queues that I have left

Check to show incoming calls for queues that the agent has left.

Follow incoming queue for outgoing calls

Check to be able to follow incoming queue for outgoing calls.

Save outgoing number setting

Check to save outgoing number setting.

Use busy-light

Enable use of busy-light.

Break through on redial

Enables break through on redial.

Use shift + dial key to dial number entered in search field

Check to use shift + dial key to dial number entered in search field.

Number of required agents

Enter the number of required agents.

Sound file for incoming IM

Select sound file for incoming IM

Sound file for incoming mail

Select sound file for incoming mail

Call Handling – Call Information

The screenshot shows the 'Settings' window with the 'Call handling' section expanded and the 'Call information' tab selected. The settings are organized into two main sections: 'Popup settings for external calls' and 'Popup settings for internal calls'. Each section has a 'Default view' dropdown, three checkboxes for 'Show greeting', 'Show list if more than one user found for extension', and 'Show web page if the user has a valid url'. Below these is a 'Popup URL field' dropdown and a checkbox for 'Use web page for "All info"'. At the bottom right are 'OK', 'Cancel', and 'Save as default' buttons.

Setting	External Calls	Internal Calls
Default view	Calender	List
Show greeting	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Show list if more than one user found for extension	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Show web page if the user has a valid url	<input type="checkbox"/>	<input type="checkbox"/>
Popup URL field	None	None
Use web page for "All info"	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Popup settings for external/internal calls

Default view

Select the default view for external and internal calls, respectively.

Show greeting

Check to show greeting for external and internal calls, respectively.

Show list if more than one user found for extension

Check to show list if there is more than one user for the external and internal extensions, respectively.

Show web page if the user has a valid url

Check to show web page for the user for external and internal calls, respectively.

Popup URL field

Select popup URL field.

Use web page for "All info"

Check to use web page for "All info".

Numbers

Add the telephone numbers that can be used to enable dual ringing in the agent user interface by clicking Add number.

Call Handling – Quick Dials

Settings

- User Interface
 - ▾ Call handling
 - General
 - Call information
 - Dual ringing
 - Quick dials**
 - Call log
 - Skype
 - Presence
 - Conversation log
 - Web
 - Database
 - Bulletin board
 - Mail
 - Keyboard
 - Integration

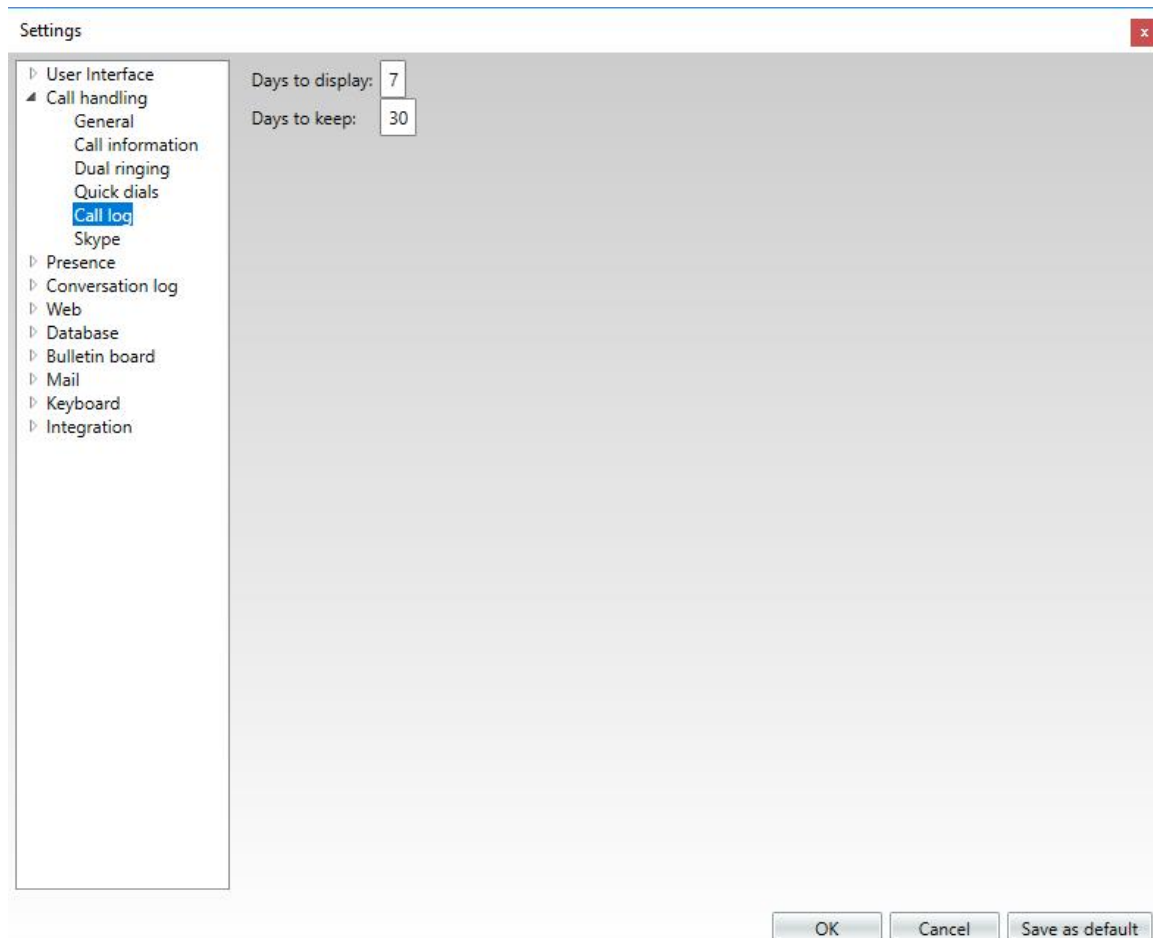
Key	Number
Ctrl+1	
Ctrl+2	
Ctrl+3	
Ctrl+4	
Ctrl+5	
Ctrl+6	
Ctrl+7	
Ctrl+8	
Ctrl+9	
Ctrl+0	

☐ Play sound when dialling

OK Cancel Save as default

Enter quick dial numbers for the control key combinations. Check the checkbox if you want to play a sound when dialling. This is recommended since dialling with hotkeys is very fast and hard to notice.

Call Handling – Call Log



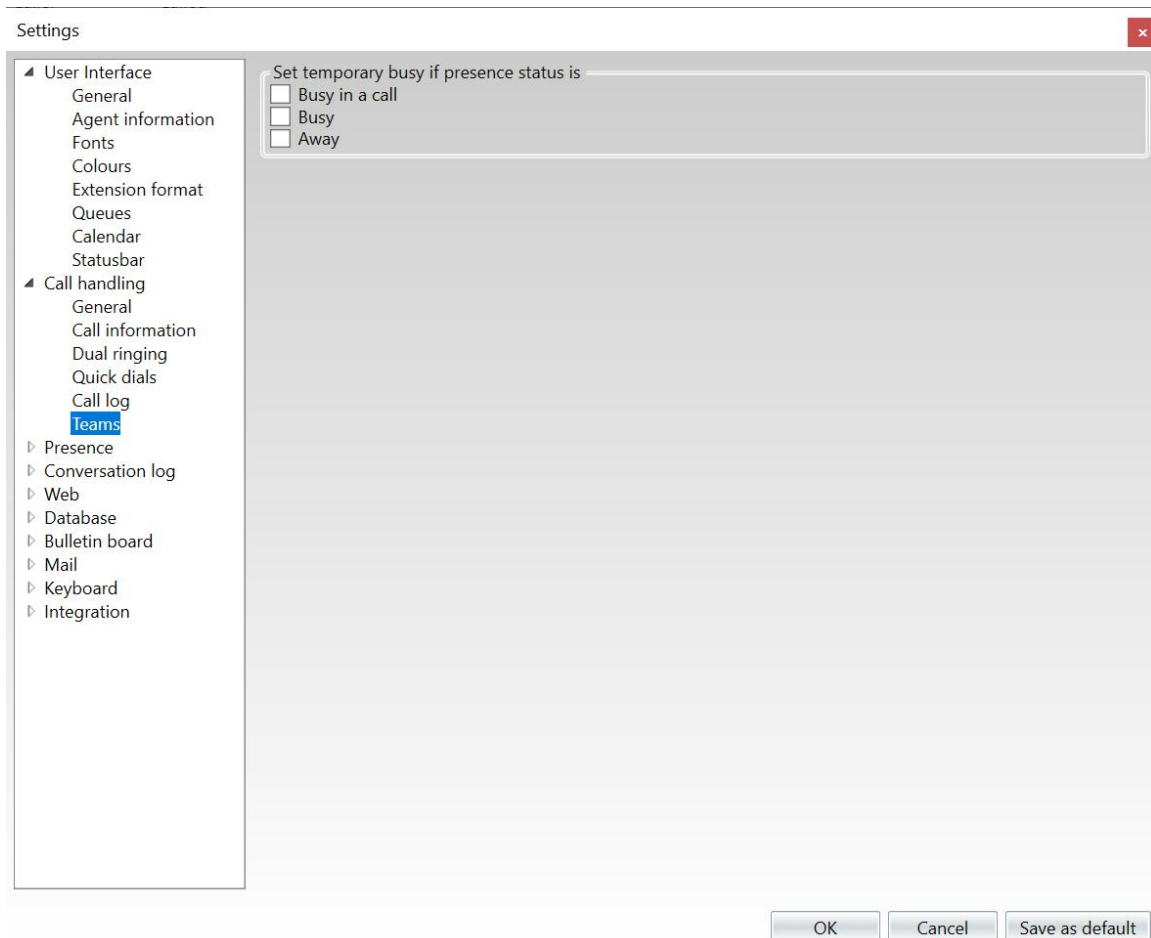
Days to display

Determines how many days of the call log that should be displayed in the user interface.

Days to keep entry

Determines how many days of the call log that should remain in the database. All entries older than this will be purged from the database.

Call Handling – Teams



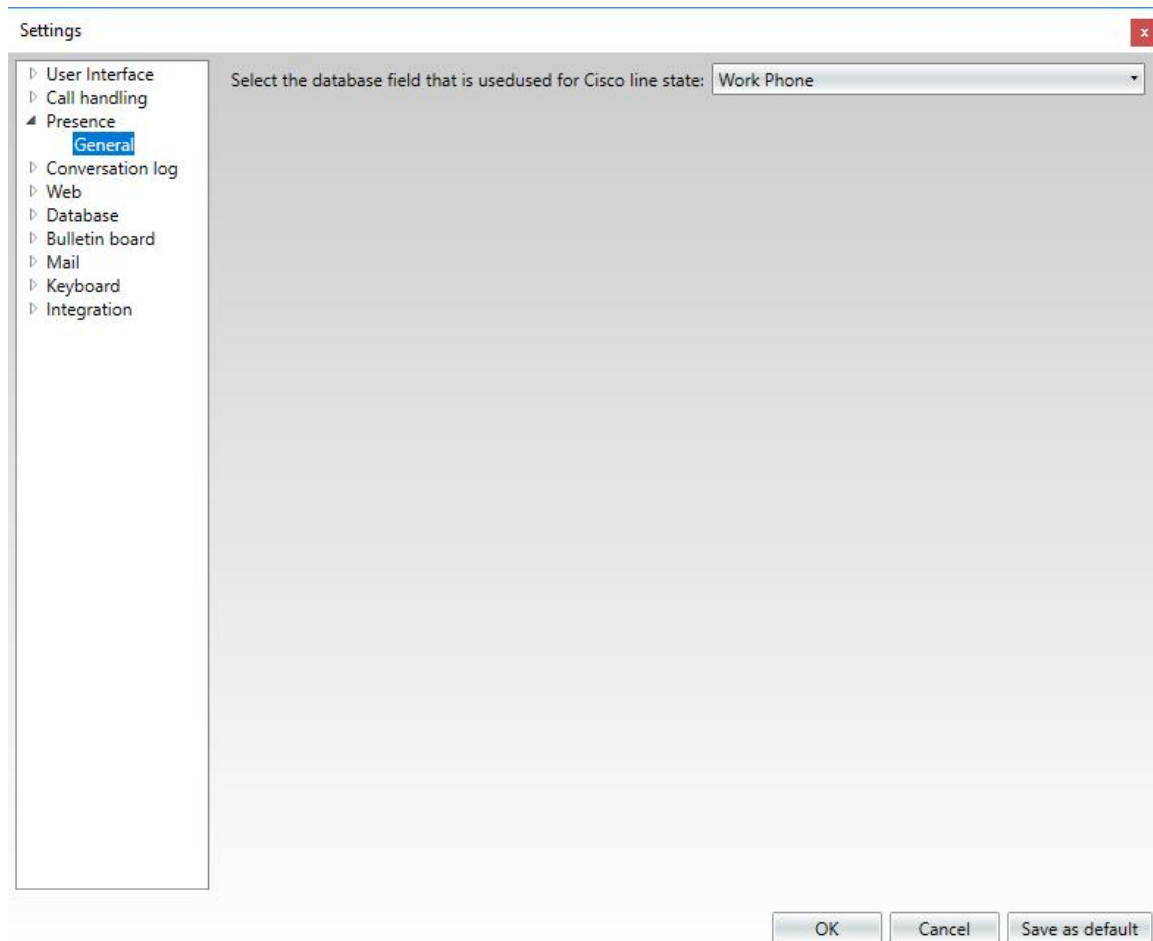
Set temporary busy if presence status is

Set the agent to temporarily busy for the selected presence.

Use Teams client for instant messaging **TESTA**

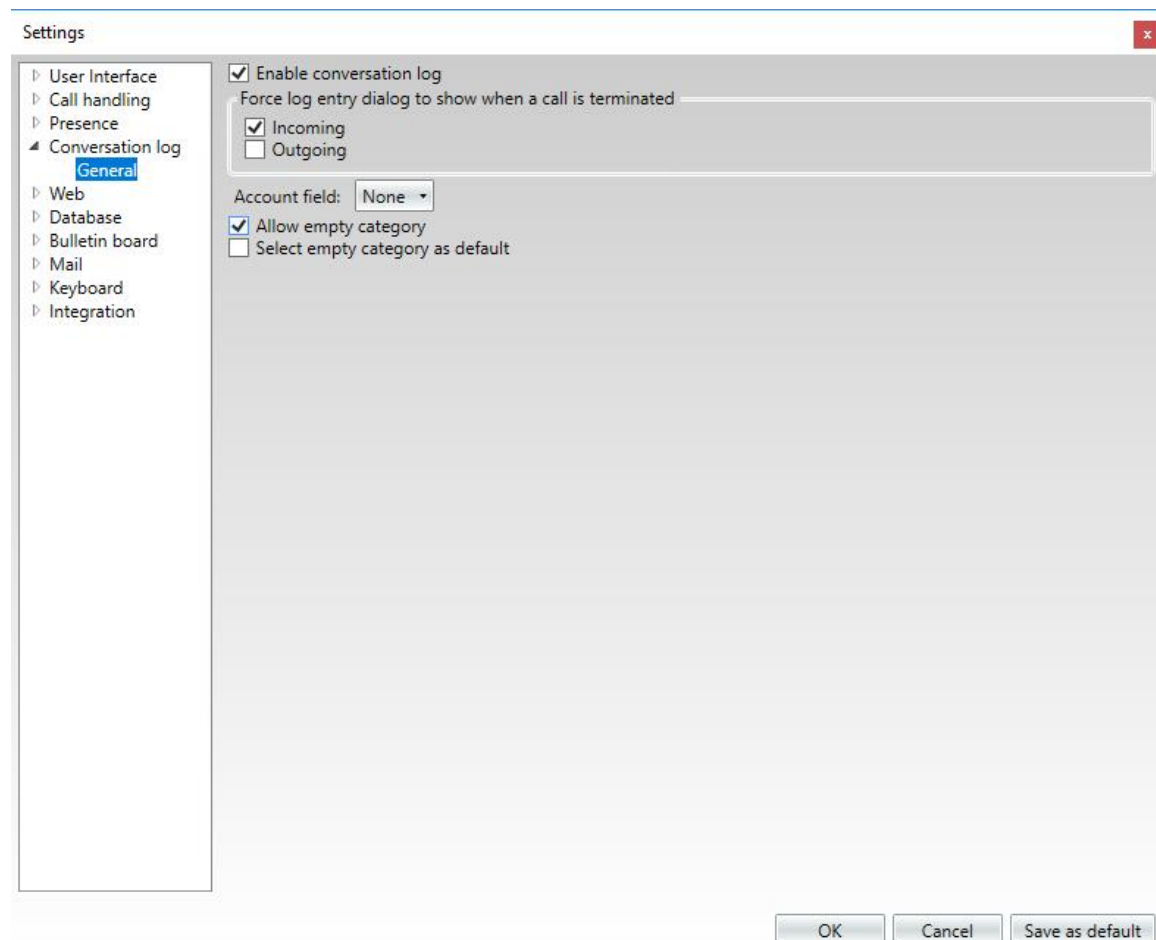
Check if you want to use Teams for instant messaging. If unchecked, instant messaging in Competella Multimedia Agent will be used.

Presence – General



Select the database field that is used for Cisco line state

Conversation Log – General



Enable conversation log

Check to enable the conversation log function.

Force log entry dialog to show when a call is terminated

Check to automatically open a new log entry after finishing a call.

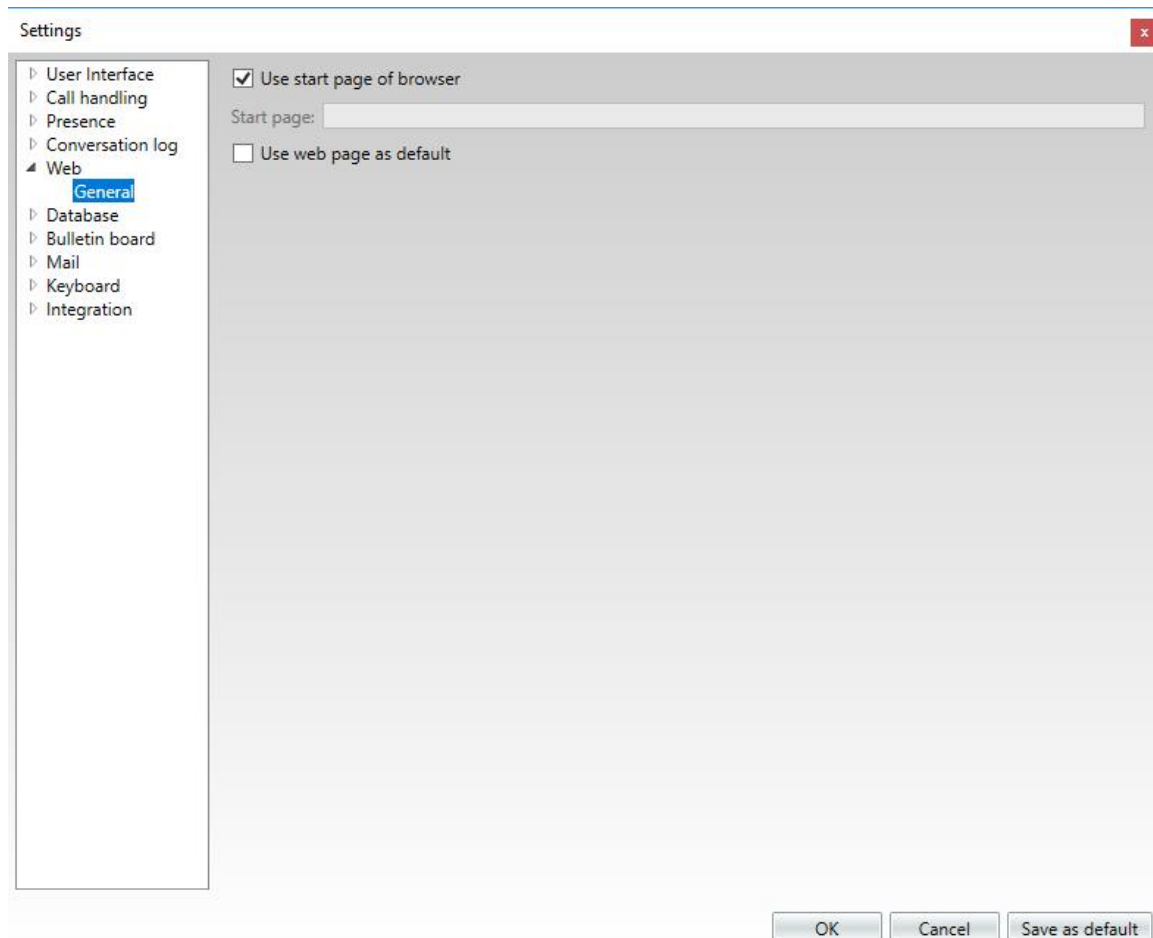
Account field

Select the account field.

Allow empty category

Select empty category as default

Web – General



Use start page of browser

Enter the start page for browser sessions.

Use web page as default

Check to use web page as default.

Database – General

Settings

▸ User Interface
 ▸ Call handling
 ▸ Presence
 ▸ Conversation log
 ▸ Web
 ▾ Database

General

▸ Search provider
 Phone numbers
 Search result fields
 Search result column fields
 Calendar info fields
 ▸ Bulletin board
 ▸ Mail
 ▸ Keyboard
 ▸ Integration

Default company: CompetellaProd

Office hours

Start time: 08:00

End time: 17:00

☒ Use paging for searches

Number of entries per page: 30

Minimum number of characters before auto search starts: 1

☒ Show user info in list
☒ Show info for selected user
☒ Skip weekend for default activity return time
☐ Enable multi select
☒ Show activity in status column
☒ Show keywords on one line
☐ Highlight search hits

OK Cancel Save as default

Default company

Select the default company database.

Start time

Selects the default time the workday starts. Used in the calendar view.

End time

Selects the default time the workday ends. Used in the calendar view.

Use paging for searches

Show the search results in pages if the number of search hits exceeds the number set below.



Number of entries per page

This setting determines the maximum number of search results that should be presented per page.

Minimum number of characters before auto search starts

Automatic search begins after you have written the given number of characters. Zero (0) means that automatic search is turned off. You can always search by pressing **Enter**.

Show user info in list

If checked, the user info will appear in the list. If unchecked, the user info will appear below the list. Toggle this checkbox with  + .

Show info for selected user

Check if you want to automatically show user info for the selected user.

Skip weekend for default activity return time

By unchecking this box, the default activity return time can be on weekends.

Enable multi select

If checked, each person in the list will get a check box, enabling you to select several persons to for example send e-mails to.

Show activity in status column

If this is checked and the user has an activity, the status text is replaced with the activity name.

Show keywords on one line

Check to show keywords on one line instead of several.

Highlight search hits

Check to visually highlight the search hits.

Database – Search Provider

Settings

- ▷ User Interface
- ▷ Call handling
- ▷ Presence
- ▷ Conversation log
- ▷ Web
- ▲ Database
 - ▷ General
 - ▷ **Search provider**
 - ▷ Phone numbers
 - ▷ Search result fields
 - ▷ Search result column fields
 - ▷ Calendar info fields
- ▷ Bulletin board
- ▷ Mail
- ▷ Keyboard
- ▷ Integration

Number lookup

Available providers		Selected providers		
Intouch Norway	→	Competella	↑	Reset providers
LDAP	←		↓	

User search

Available providers		Selected providers		
Intouch Norway	→	Competella	↑	Reset providers
LDAP	←		↓	
Skype				

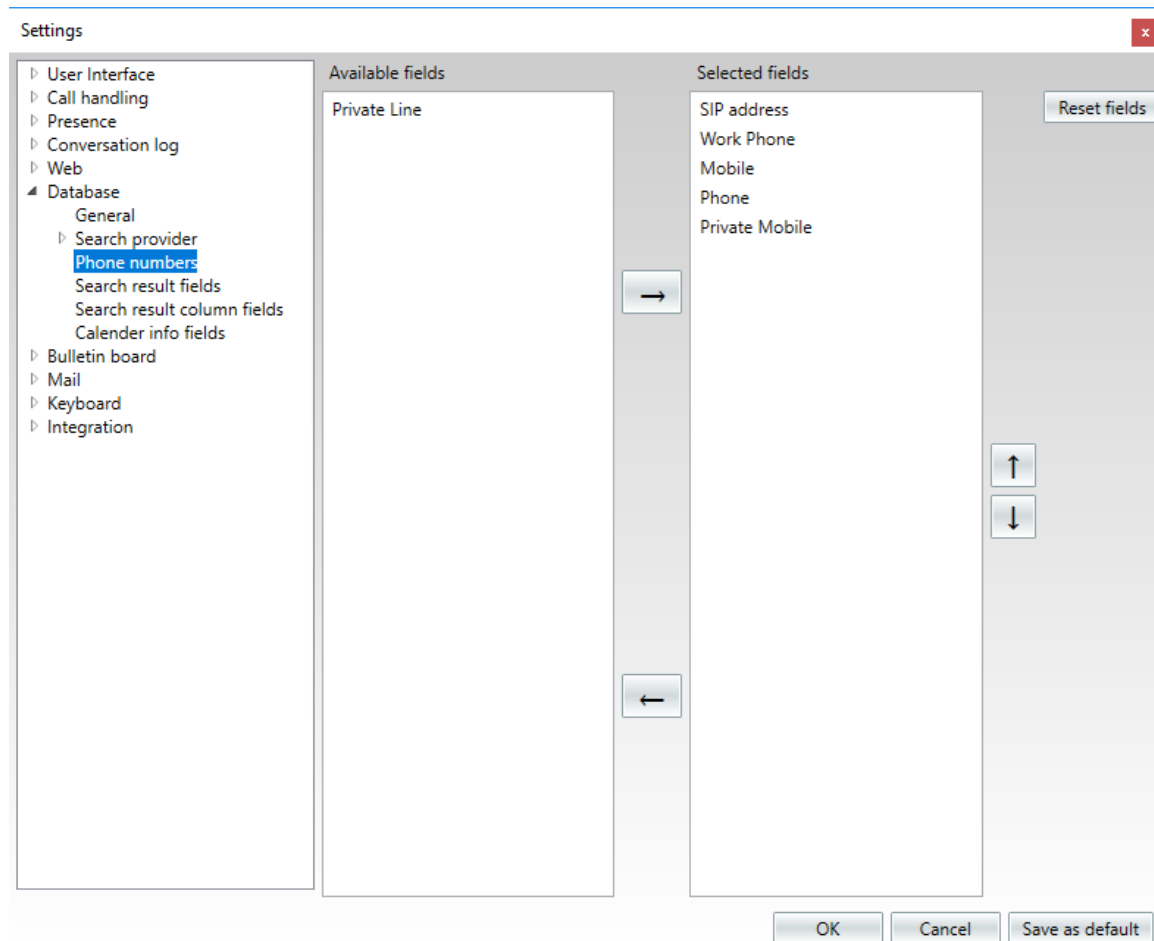
Prefix used to select provider:


OK Cancel Save as default

Select which search provider or search providers you want to use for searches. Select a search provider in the left column and click on the right arrow to put it in the **Selected providers** column to the right.

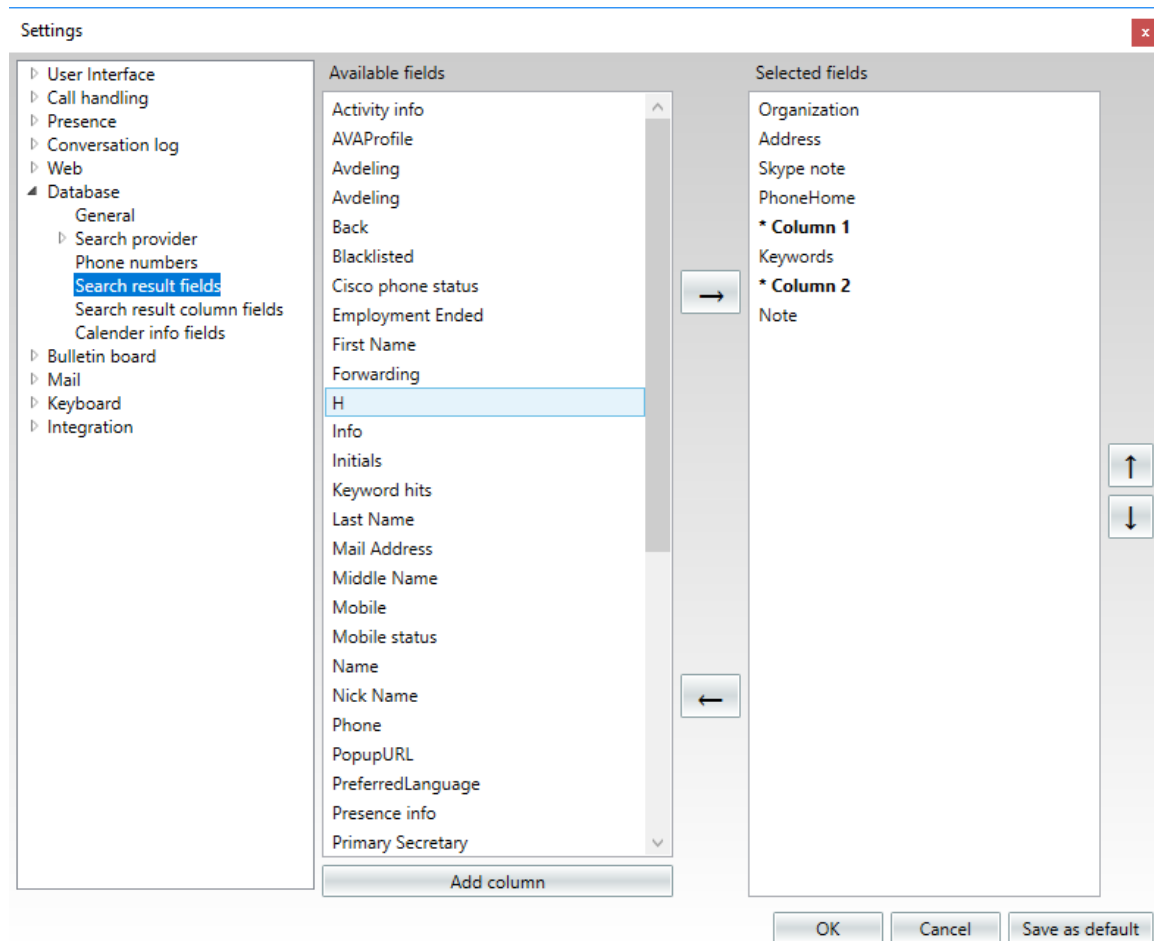
Further configuration of the search providers are made in separate sub settings.

Database – Phone Numbers



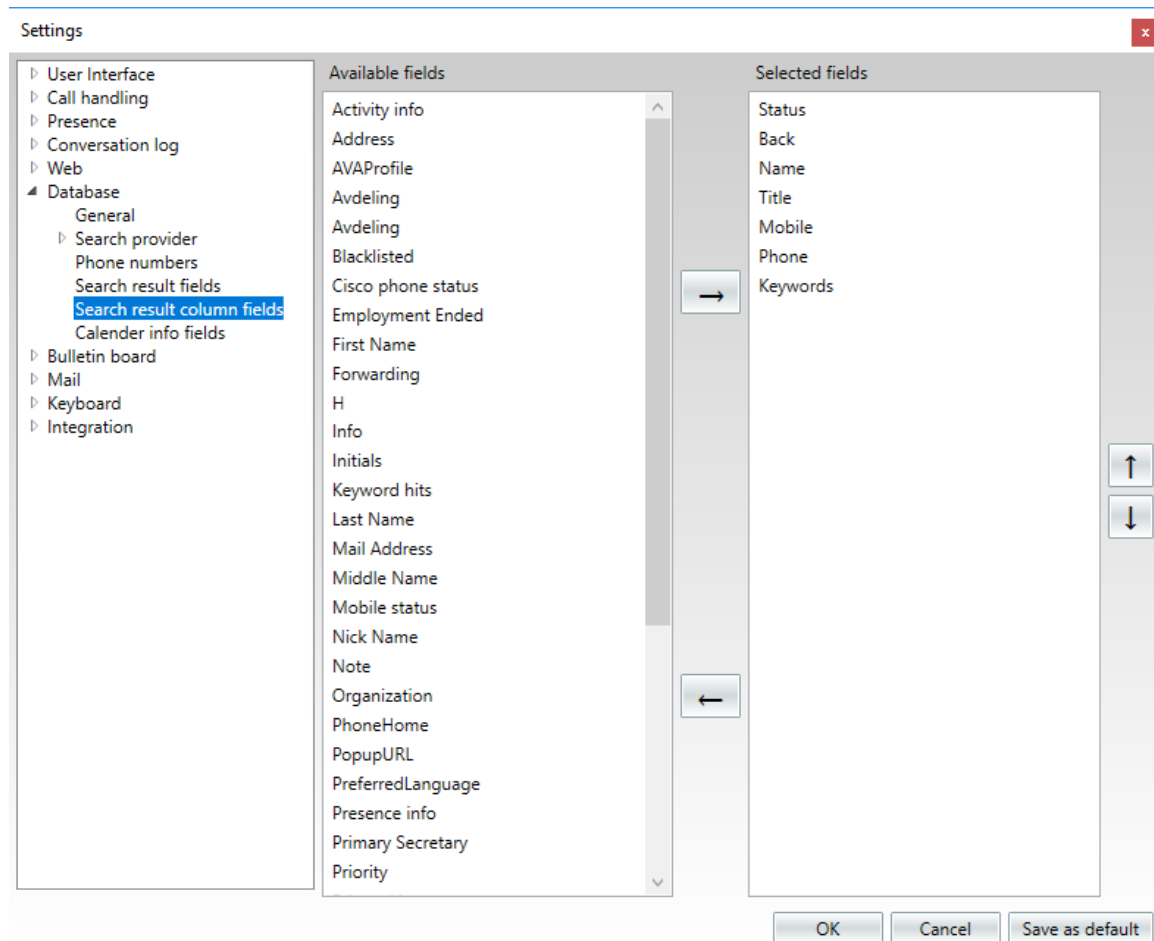
This dialog allows the user to select which field should be used to dial when the  button is pressed. The **Selected fields** column displays the currently selected fields. The application starts with the field on top and goes through each field until it finds a valid sip address or telephone number. For example, if all the users normally should be reached by their mobile phones, the **Work Mobile** field should be at the top of the list.

Database – Search Result Fields



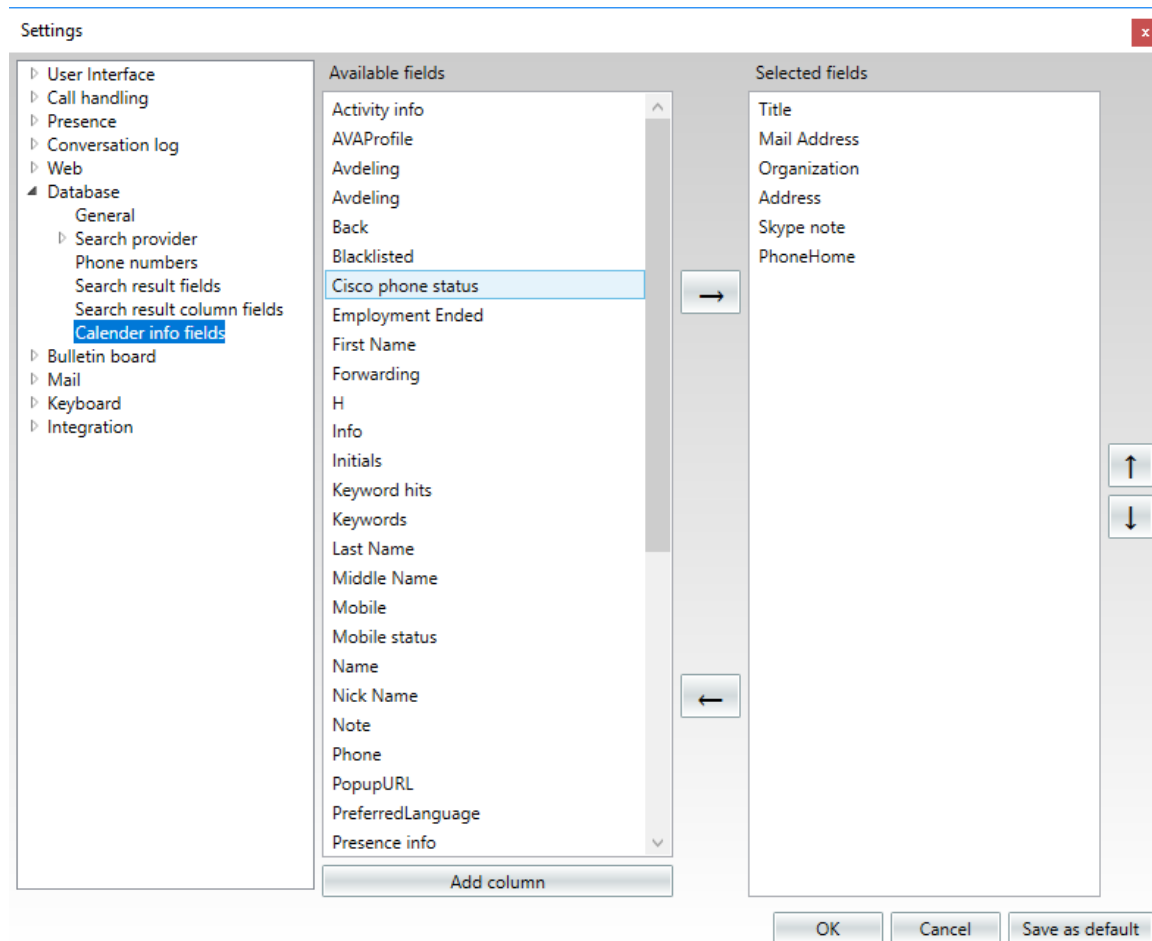
This dialog is used to select the fields visible in the info box that is displayed when selecting an entry in the search result list box.

Database – Search Result Column Fields



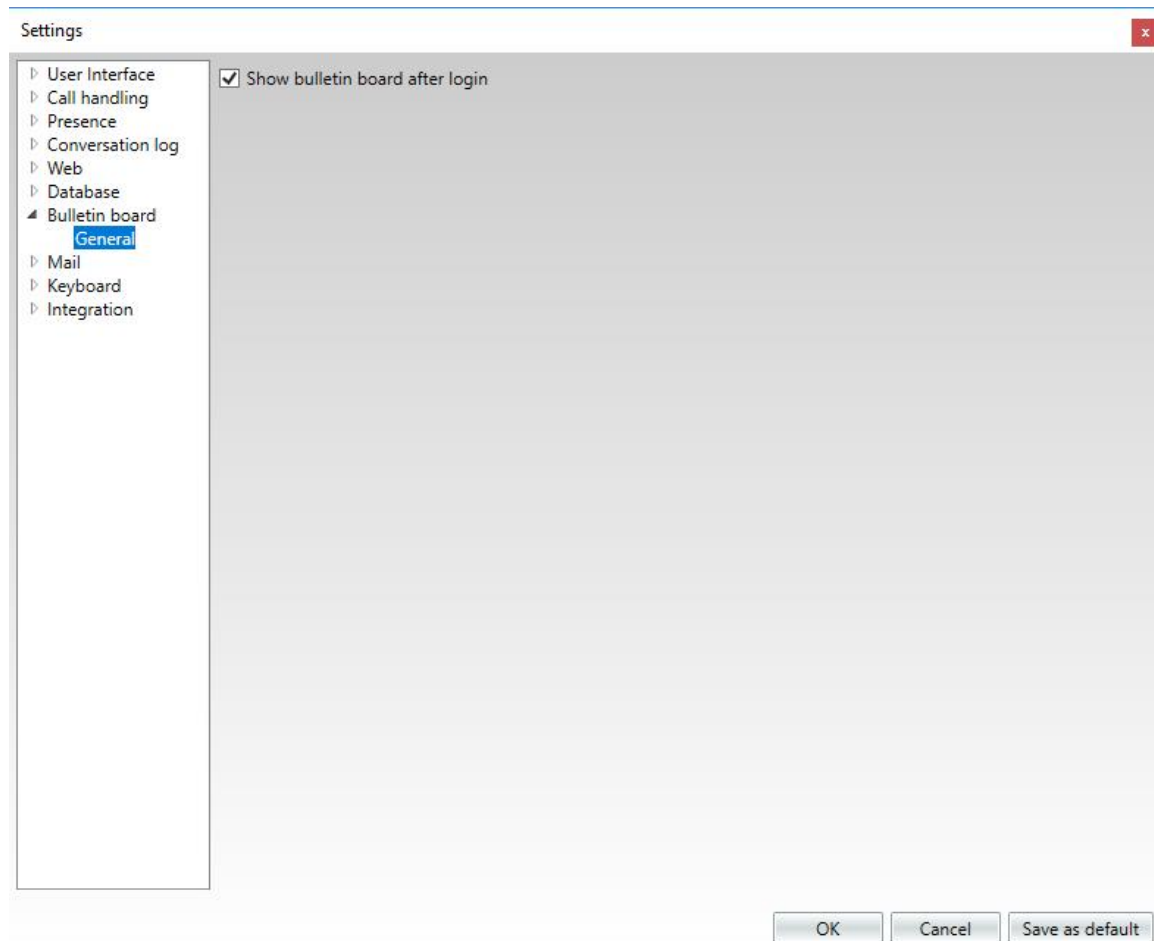
This dialog is used to select the columns that should be displayed for each entry in the search result list.

Database – Calendar Info Fields



This dialog is used to select the fields visible in the info box that is displayed when viewing the calendar for a user.

Bulletin Board – General



Show bulletin board after login

Enable the bulletin board function.

Mail – General

Settings

Agent Mail

Subject: Message from Agent

Select client for new mail: Integrated

☒ Use personal mail address of agent

Mail queues

Select mail reader: Outlook

☐ Show mails in list for incoming calls

☒ Show mails for inactive queues

☒ Show issue number in mail queue

☐ Can save messages

☒ Ask if any saved messages present on exit

☒ Ask if message should be saved when canceling editing

OK Cancel Save as default

Subject

Specifies the subject in e-mails from the agent.

Select client for new mail

Use personal mail address of agent

Use personal mail address of agent

Check to use the agent's personal mail address.

Select mail reader

Selects how to read incoming e-mails for mail queues.

Show mails in list for incoming calls

Check to show mails in list for incoming calls.

Show mails for inactive queues

Check to show mails for inactive queues.

Show issue number in mail queue

Check to show issue number in mail queue.

Can save messages

If checked, you can save not finished or sent e-mail messages with a button.

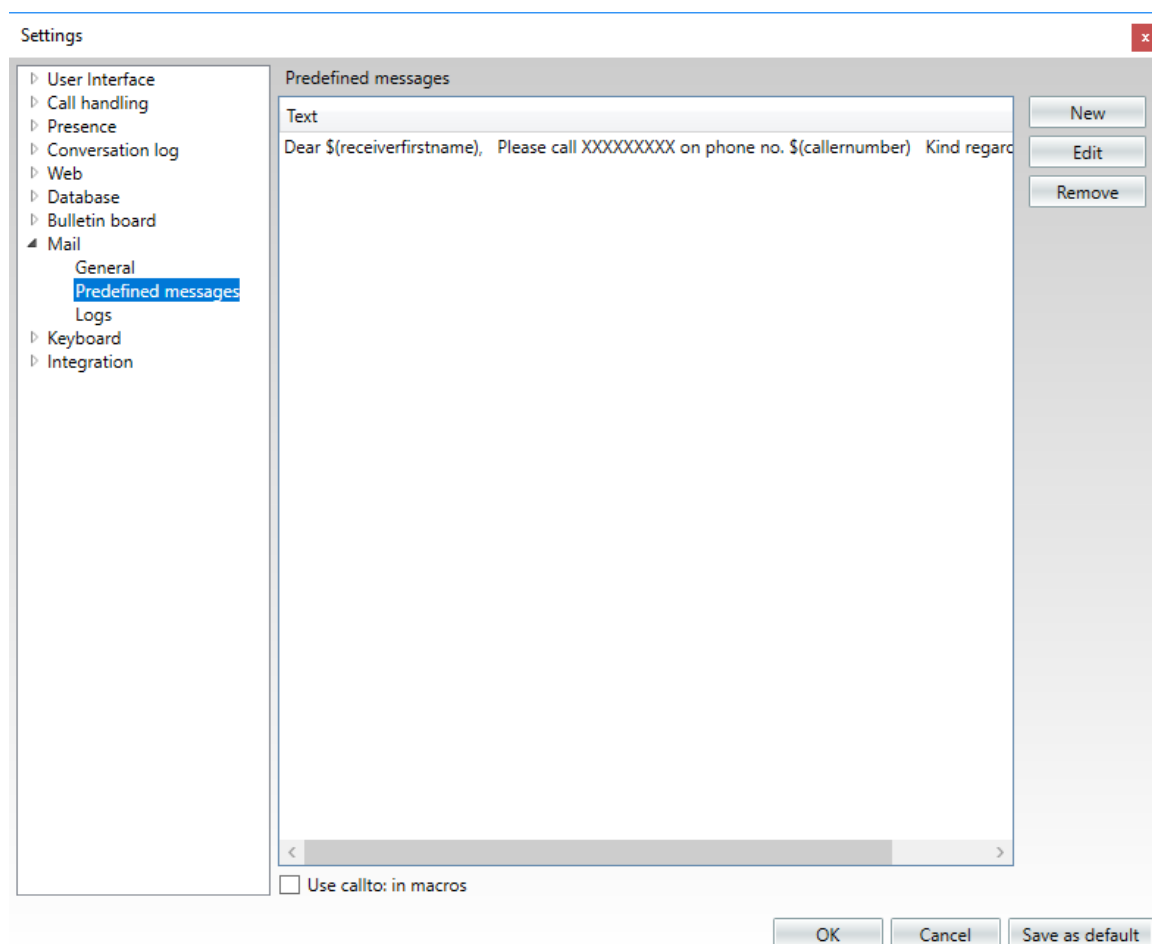
Ask if any saved messages present on exit

If checked, you will get a question if you still want to exit when you have saved messages.

Ask if message should be saved when cancelling editing

If checked, you get an opportunity to save an unfinished/unsent message when cancelling editing.

Mail – Predefined Messages



This dialog is used to declare predefined messages that the agent can use when sending e-mails to users.

To enter a new message, first press the **New** button and then enter the message in the text box. When ready, press **Save**.

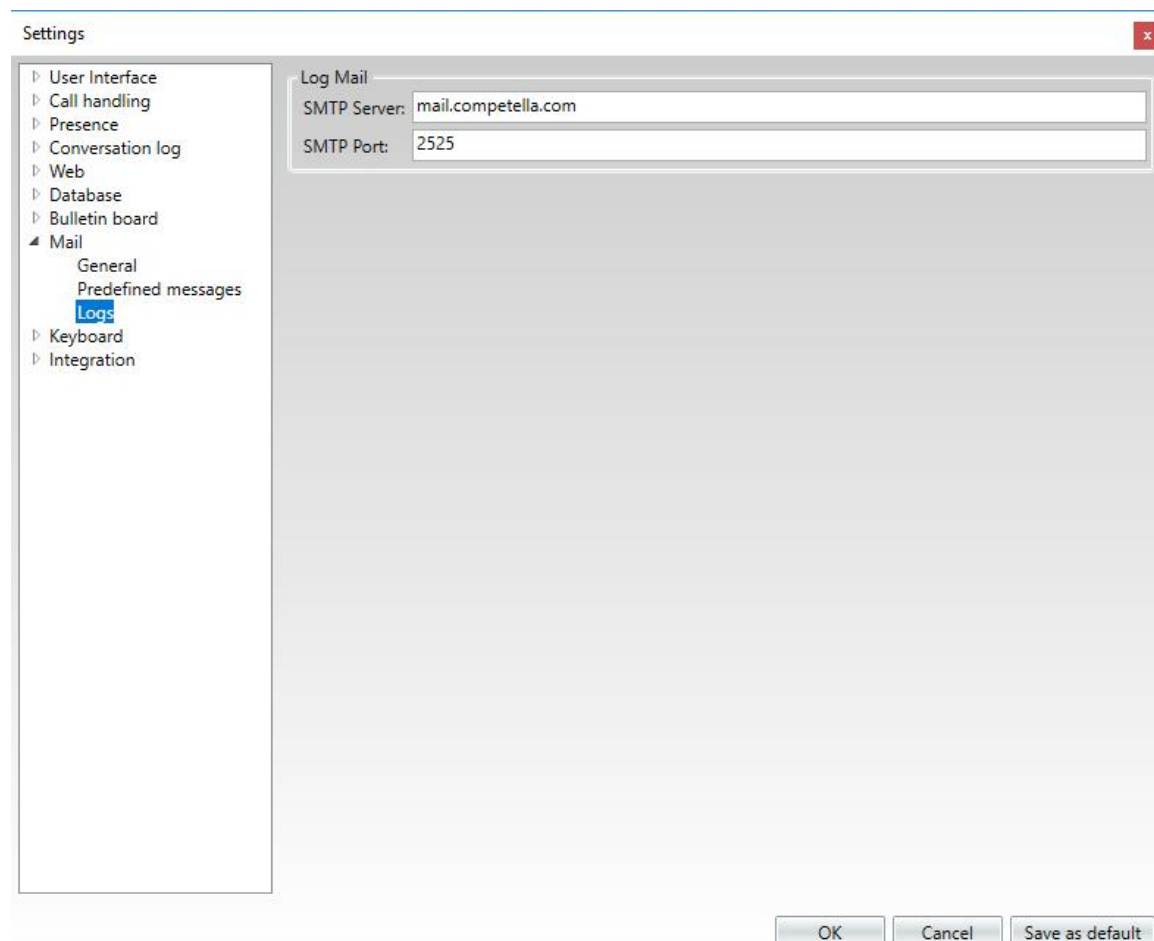
To make things even easier, there are some predefined macros that can be entered into the text. These macros will be replaced by text when the agent is actually sending an e-mail.

The following macros exist:

\$(caller)
\$(callername)
\$(callernumber)
\$(receivername)
\$(receiverfirstname)
\$(receiverlastname)
\$(receivertitlename)
\$(date)
\$(time)
\$(datetime)
\$(attendant)

If no data exist for the macro during operations, the macro will be replaced with empty text.

Mail – Logs



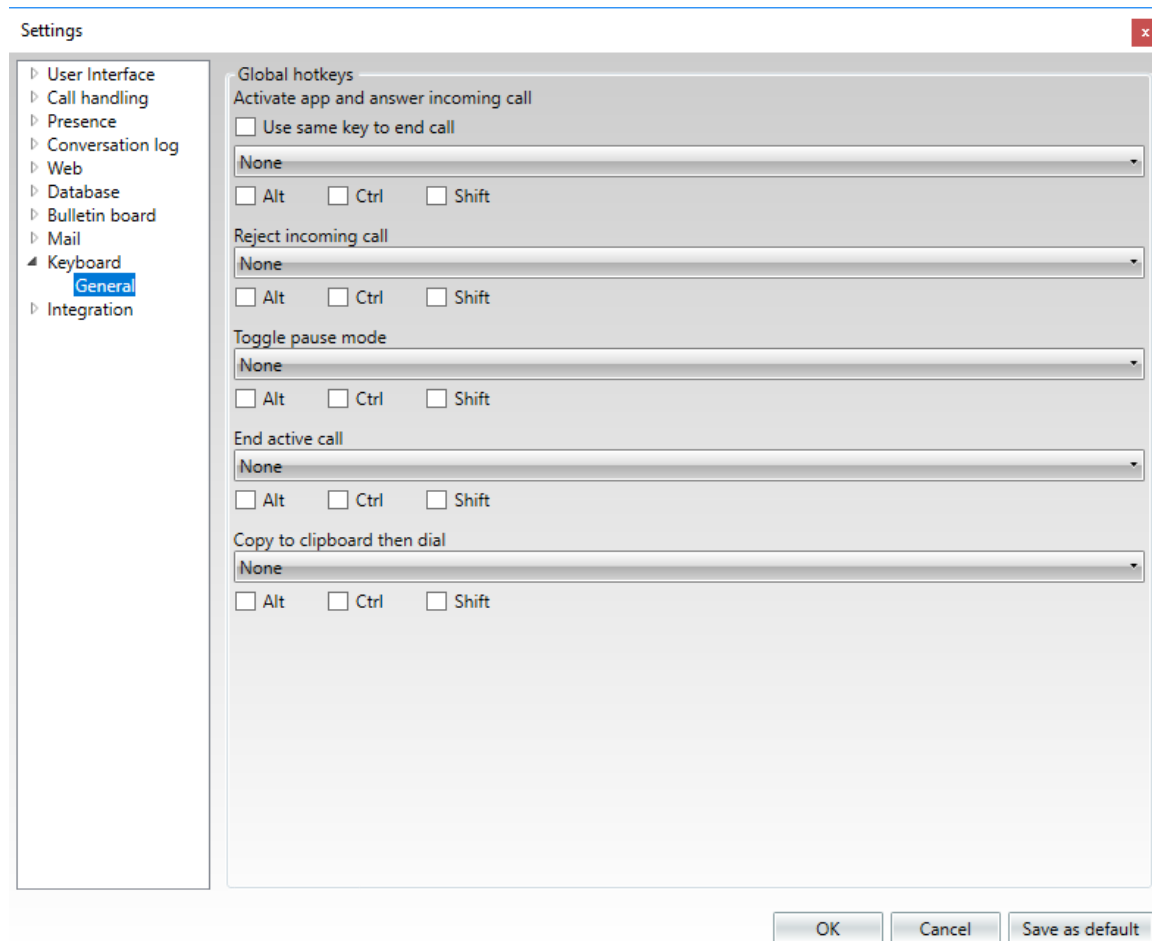
SMTP Server

Specifies which server to send log files to.

SMTP Port

Specifies the port used when sending log files.

Keyboard – General



Activate App and Answer Incoming Call

Specifies a hotkey for answering an incoming call and also to activate the application.

Use same key to end call

Check to use the key for answering incoming calls to end calls as well.

Reject Incoming Call

Specifies a hotkey to reject an incoming call.

Toggle Pause Mode

Specifies a hotkey to toggle pause mode.

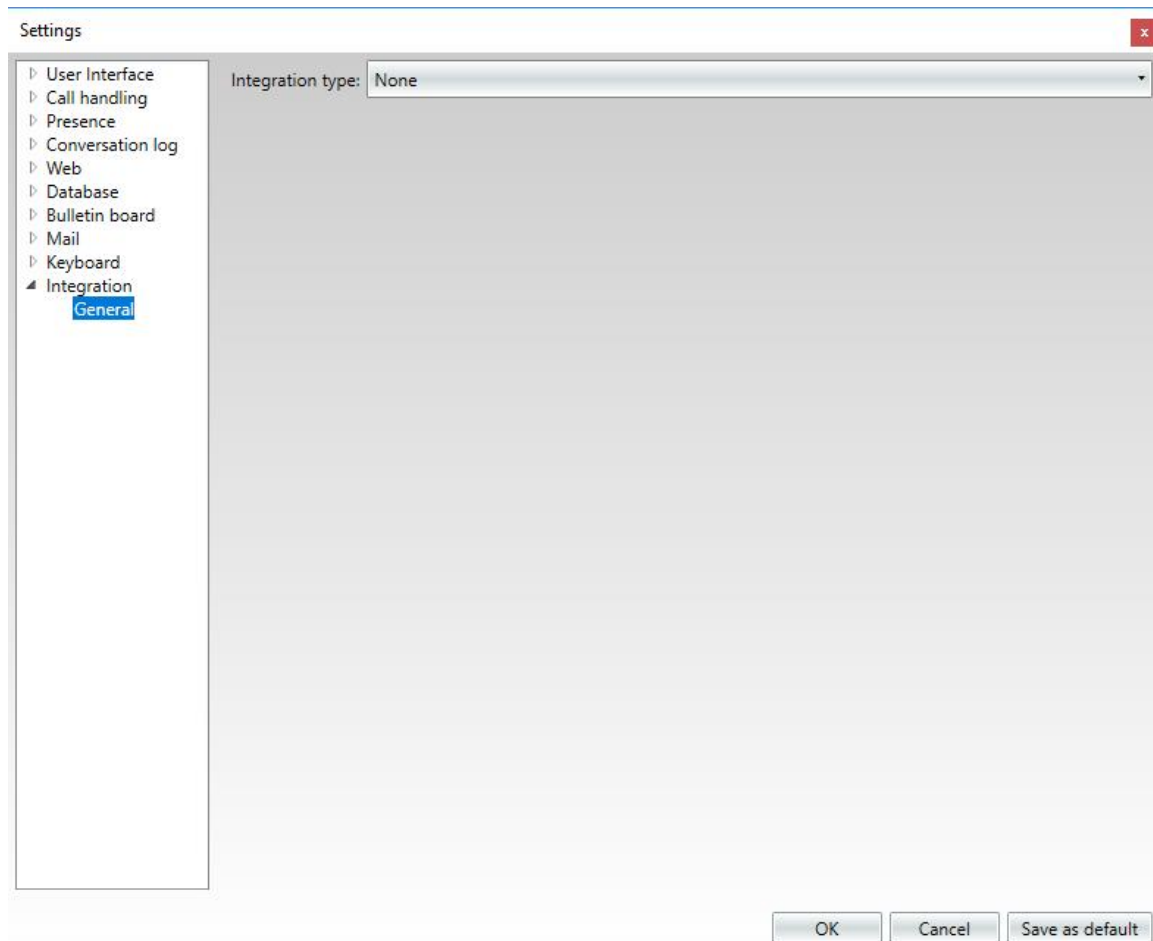
End active call

Specifies a hotkey to end active calls.

Copy to clipboard and dial

Specifies a hotkey to use a phone number copied from for example the web or a document and dial the number.

Integration – General



These settings are used for integration with external systems and are described separately in the system documentation.