

ACD AGENT ASISTANT WITH FILE POP-UP IN R9.x FOR OMNIPCX OFFICE

This document gives all necessary information on ACD Agent Asisitant with File Pop-up in R9.x for OmniPCX Office.

Note: this technical communication replaces Technical Communication "57AI_ACD Agent Asisitant with File Pop-up in R8.0_ed05".

Revision History

Edition 1: June 21, 2013	creation of the document
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Warning

Note: This technical communication replaces Technical Communication "57AI_ACD Agent Assistant with File Pop-up in R8.0_ed05".

CUSTOMER INFORMATION AND SCREEN EXTRACTION FUNCTION

When an ACD call is presented to an agent via the "Agent Assistant" application, it has the option to automatically display a "client file" pop-up according to the "CLI" (Caller Identification) or a "customer code" (functionality available since release R8.0).

Note: The "Customer code" is proprietary on the "CLI".

Using "Agent Assistant" application in "Admin" mode, the call center administrator may choose the type of "file pop-up" in agent assistant configuration and administration menus.

The client information file is automatically extracted if the agent has selected the "automatic screen pop-up" option in its configuration. In other cases, the agent may always ask for a "manual file pop-up" available in its tool bar "Client info management". The list of clients is then displayed and it is possible to choose the corresponding file or apply a "search filter".

As for the previous releases, the file pop-up may be executed via 3 different modes: integrated mode, connected mode and specific mode.

This feature is available on PC's using Windows XP SP2, Windows VISTA, Windows 7 (32 and 64 bits) and Windows 8 (32 or 64 bits) operating systems.

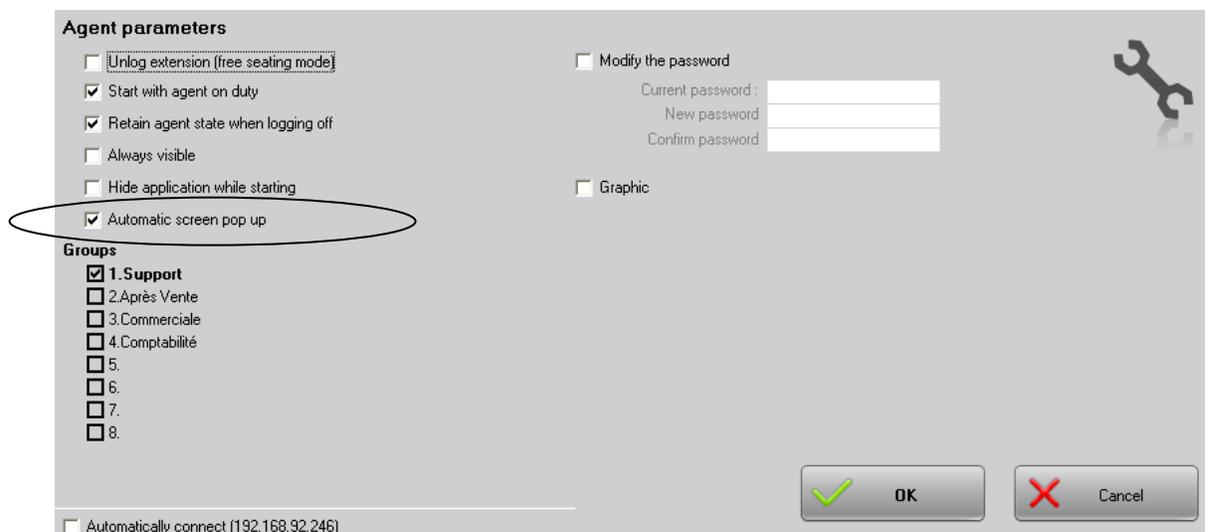
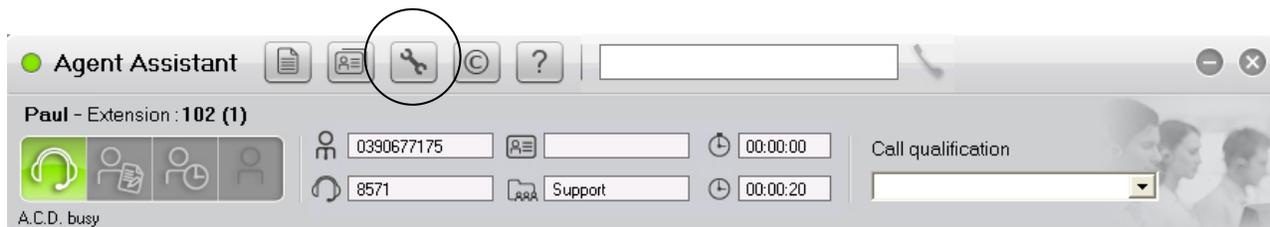
On incoming ACD call to the "agent assistant" application, the "client file" is automatically extracted according to the caller id (CLI) or the "customer code".

Note: all functionalities described in this document are also available for previous OXO releases (R3.x to R8.x).

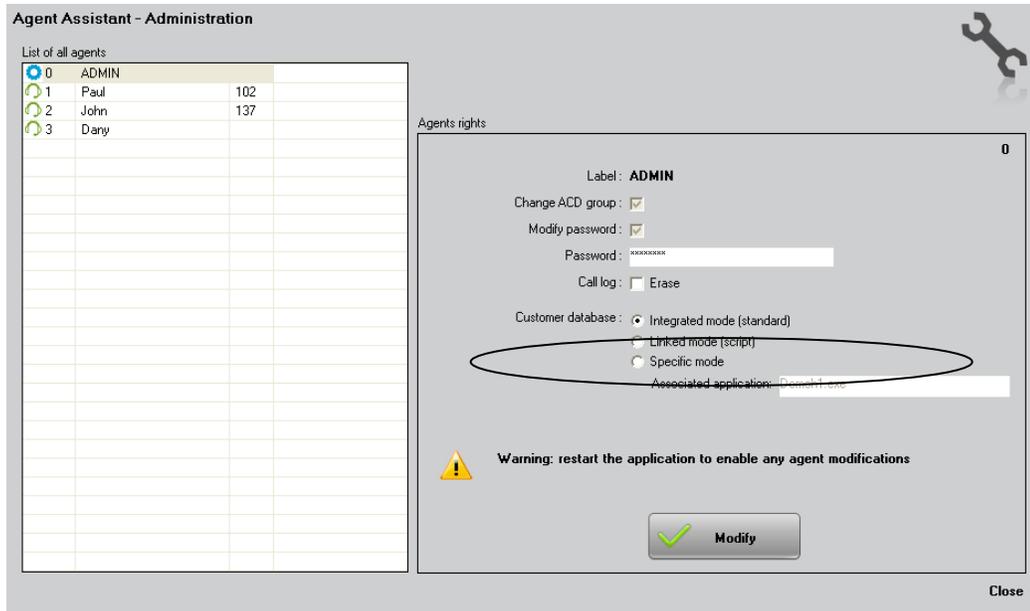
1 Integrated mode with standard file.

1.1 Integrated mode with standard file in local

The "agent application" includes a built-in contact management application (gestfiche.exe) based on Microsoft access database. This database contains the standard fields for contact management requirements such as name, telephone, address, etc... To activate the file pop-up mechanism, it is necessary to enable it in the "agent assistant/agent parameters/automatic screen pop-up" menu.



In "Agent Assistant" "Administration mode, it is also necessary to verify if "customer database" is set on "Integrated mode (standard)"



"Standard integrated mode" is using an integrated and predefined "Access" data base natively included in agent assistant application.

Example of "integrated" file pop-up:

On an incoming ACD call to the agent phone and "agent assistant", if the "file pop-up" has been enabled in the "agent assistant" and set-up in "integrated mode" in "agent administrator", the system opens a file from the "dam.mdb" Access data base (pre configured during ACD applications installations).

During the file pop-up process, the system verifies the path of the "dam.mdb" data base defined in the "dam.ini" file available under the same "DAM" directory.

The database path is under "[database]" parameter:

[database] PATH_database= DAM.mdb (we stay in the current "DAM" directory)
If nothing is specified, we stay under the current repertory where "agent assistant" is located.

Example of "Dam.ini" file by default

Example of default file

[AGENT]

Poste=102

Dernier_agent=

langue=0

[VOICE_SERVER]

VS_addr=192.168.92.246

VS_port=20772

SaisiePoste=1

[CONFIG]

Server_Tcp=1

TCP_port=32000

Discofone=0

Server_Ftp=1

PATH_config=

FTP_addr=

FTP_port=30021

FTP_userid=dam

FTP_passwd=dam

FTP_pathtemp=c:\temp

[DATABASE]

PATH_database=DAM.MDB

ODBC_nom=Microsoft.Jet.Oledb.4.0

[TIMER]

Refresh_groupe=2

Refresh_groupe_veille=20

Refresh_qualif=30

[Version]

Dam.exe=9.53.01

By default, the database is located on each PC and there is no interactivity between them.

It is possible to modify the path of the data base by editing and modifying the "dam.ini" file (see § 1.2 for shared data base).

The data base is upgraded in real time and the time response depends on the PC' s memory availability.

The customer file may be modified at any time.

1.2 Integrated mode with standard file in Network (shared)

In order to share the database between different agents and PC's on a same network (LAN), it is necessary to install it on a server (or a specific PC) on this LAN.

In this case it is necessary to modify the database path, editing and modifying the file "**dam.ini**" on all PC's (see § 1.1).

For example: if the database is located under a specific PC on the LAN:

Pc name: test-pc

Directory: C:\ACD

- On the PC server, the directory containing the data base must be shared (share c:\ACD for the example)
- On each agent PC, the concerned network drive must be connected (connect drive E on [\\test-pc\ACD](#) for this example)
- On each PC, specify the new path in the "dam.ini" file by the following way:
PATH_database= [\\test-pc\ACD\dam](#)

Example of modified "Dam.ini" file

```
[AGENT]
Poste=101
Dernier_agent=paul
langue=0
```

```
[VOICE_SERVER]
VS_addr=192.168.92.246
VS_port=20772
[CONFIG]
Server_Tcp=1
TCP_port=32000
Server_Ftp=1
PATH_config=
FTP_addr=
FTP_port=30021
FTP_userid=dam
FTP_passwd=dam
FTP_pathtemp=c:\temp
[DATABASE]
DB_odbc=
PATH_database= \\test-pc\ACD\
ODBC_nom=DAM_DBC
ODBC_userid=DAM
Etc.....
```

The database will automatically be updated in real time according the network "answers time" and memory available in each PC.

All agents with "agent assistant" application will access the same database.

Note: if 2 agents access simultaneously the same customer file and make modifications in this file, only modifications done by the first agent closing the file will be saved.

When the second agent closes this same file, the system will propose a choice between:

- record the file and save his modifications and erase the one done by the previous agent
- record the file without saving his modifications (modifications from the previous agent are displayed and saved)

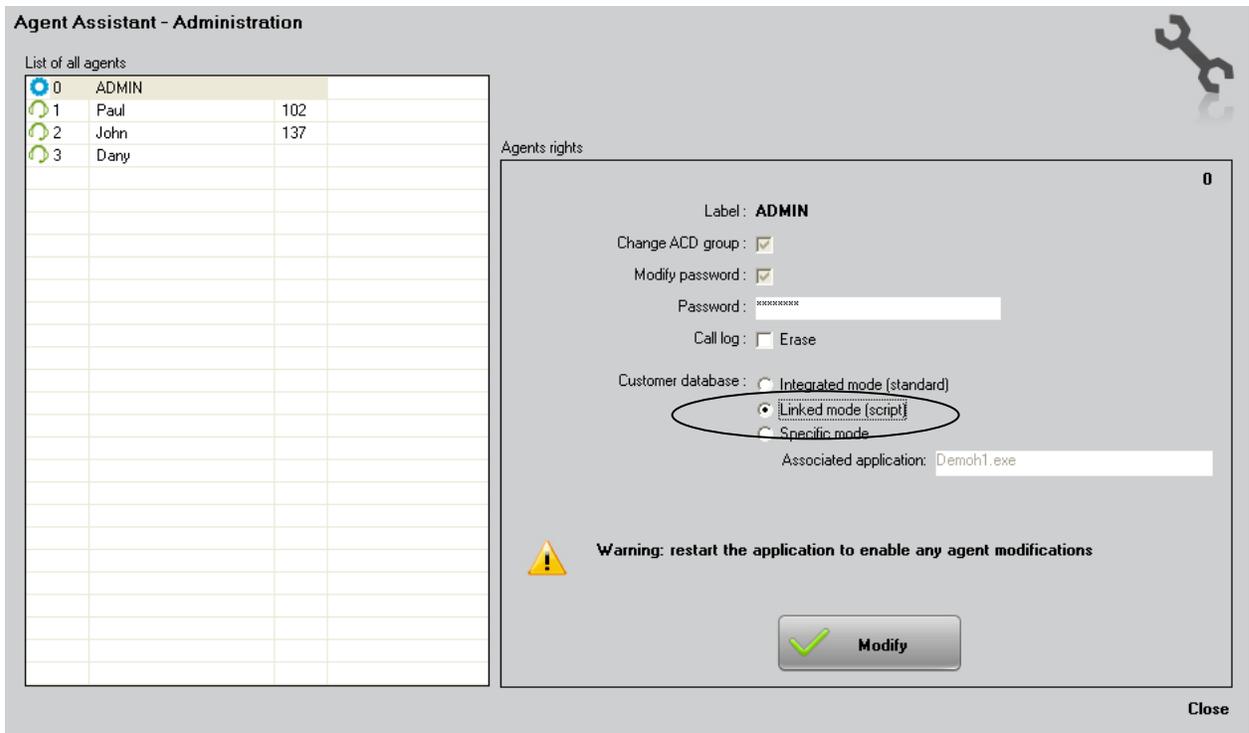
2 Linked mode

The "Agent assistant" application is delivered with a "script" which authorizes a "contact" file pop-up in interconnectivity with Microsoft Outlook 20xx.
The "agent assistant" configuration remains unchanged.

Note: "Customer code" information is not supported in "Connected mode"

2.1 Linked mode in Local

In "Agent Assistant Administration" mode, it is necessary to enable "customer database" with "linked mode (script)"



The screenshot displays the "Agent Assistant - Administration" window. On the left, a table titled "List of all agents" shows the following data:

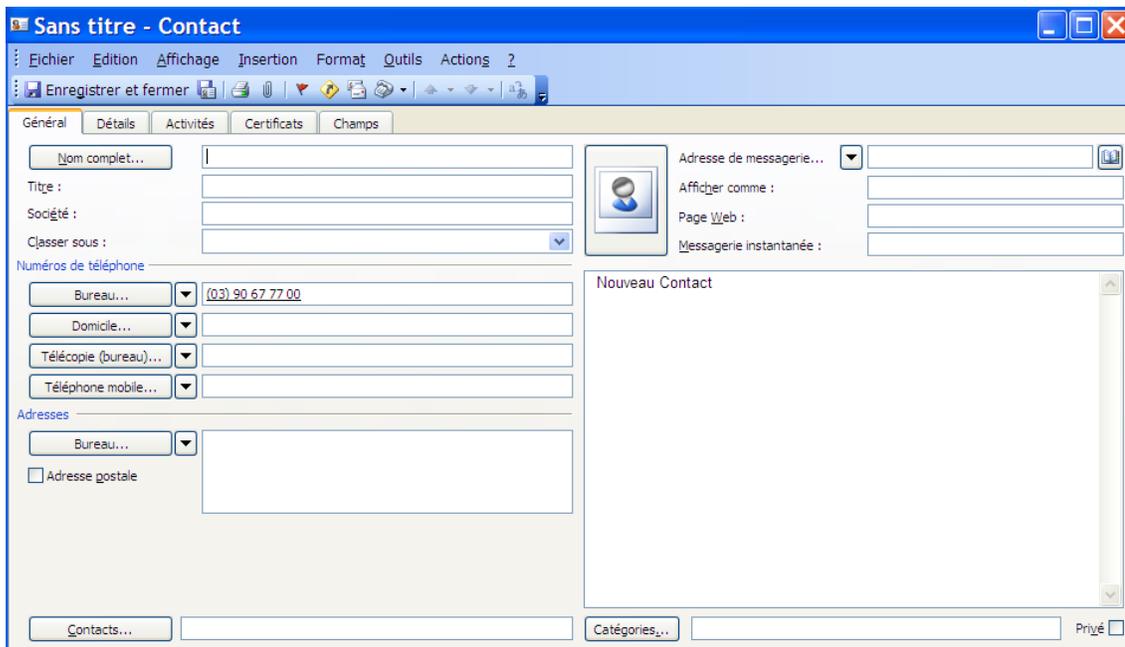
ID	Name	Phone Number
0	ADMIN	
1	Paul	102
2	John	137
3	Dany	

The right pane, titled "Agents rights", shows configuration for the selected agent "ADMIN". The "Customer database" section has three radio button options: "Integrated mode (standard)", "Linked mode (script)" (which is selected and circled in red), and "Specific mode". Below this, the "Associated application" field contains "Demoh1.exe". A warning message states: "Warning: restart the application to enable any agent modifications". A "Modify" button with a green checkmark is at the bottom.

"Microsoft Outlook 20xx" must be installed on the client PC.

A predefined script is integrated in "agent assistant" application (Wscript.exe Script.vbs) referring to "Outlook".

On an ACD incoming call into the agent, an Outlook contact will automatically be open; the agent will then be able to enter and record information and data concerning the client. All this information will be stored under the "Outlook contact" repertory.



Principles:

The "agent assistant" application receives the "caller number" (CLI) and forwards it to "Wscript" which executes "script.vbs".

"Wscript.exe" (Windows Script Host) is the default program executing "Visual basic scripts".

"Script.vbs" is executed by "Wscript" located in the "agent assistant" application installation repertory.

2.2 Connected mode in network (share database)

The only way to share Outlook contacts is to create a public contacts repertory. The administrator will have to install a Microsoft Exchange and shared Outlook public contact database.

All agents must have Outlook 20xx installed on their PC and a specific account (login) in order to have access to the Microsoft Exchange server and the to the public repertory. A picture of this specific public repertory will be created on each PC. It is also mandatory to modify the "Script.vbs" file in order to reference it to this database.

3 Specific mode

This mode is used to provide interconnection between the "agent assistant " application and a third party application. This is useful if companies use their own customer relation management software.

To connect the agent application to another customer application, the call center manager specifies an application which will be called by the "agent application" when there is an ACD incoming call.

When the ACD call is assigned to an agent, the associated "agent application" executes a command line entered in this section, including the 3 parameters specific to this call: the caller number (CLI), the called number (DDI) and he "customer code".

3.1 Specific mode with "post_it script" (available per default): example 1

In "Agent Assistant Administration" mode, it is necessary to enable "customer database" with "specific mode"

As an example and by default, we can use "Wsript.exe post_it.vbs".

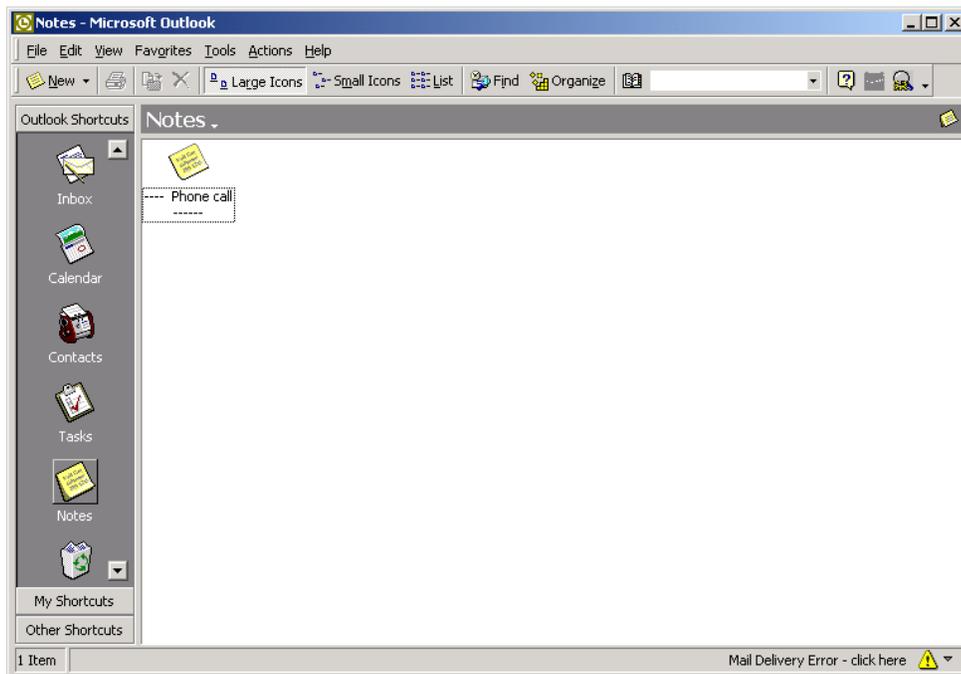
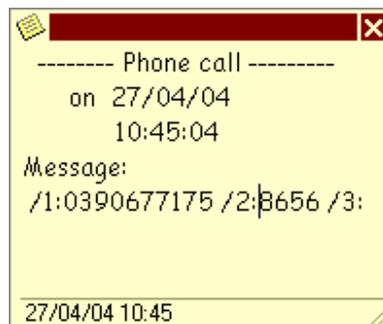
The file "Post_it.vbs" is available under:

C:\program files\Alcatel OmniTouch Call Center Office\agent_assistant\....

When an ACD call is assigned to the "Agent Assistant" application, the 2 following parameters are delivered:

- argument 1 : /1:XXX > Calling phone number (CLI)
- argument 2 : /2:XXX > Called phone number (SDA)

Execution of "Post_it.vbs (in visual basic script) generates an Outlook note including the date, time, CLI, DDI and "client code" information. This memo will be stored in the "Outlook" note repertory.



3.2 Specific mode open

With the "specific mode" it is also possible to execute scripts and/or complete programs managing ACD CSTA information's and parameters send by Agent Assistant application.

For all information's, please contact:

Discofone (Alcatel Lucent program Partner)

www.discofone.fr

Tel: + 33 (0)1 57 61 40 14

4 File pop-up with Pimphony

Pimphony may also be used for the file pop-up feature.

Pimphony supports the following contact managers:

- Microsoft Outlook
- Act ! (Sage Contact from Sage group)
- GoldMine from FrontRange Solution
- Microsoft Access

For more details on interconnections with Pimphony, please consult the Pimphony technical communication.

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Before submitting a Service Request, make sure that:

- In case a Third-Party application is involved, that application has been certified via the AAPP
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- You have read through the Troubleshooting Guides and Technical Bulletins relative to this subject available in the [Technical Documentation Library](#)
- You have read through the self-service information on commonly asked support questions, known issues and workarounds available in the [Technical Knowledge Center](#)

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