Desktop Client Application User Guide

Version 8.x

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OVERVIEW

The OAISYS Desktop Client is a powerful desktop application that dramatically enhances the OAISYS solution experience. This guide provides installation procedures, and details on the available features.

INSTALLATION

Browse to the server URL. The URL may be similar to this: http://ServerName/DesktopClient/

NOTE: Secondary DNs are supported within the Desktop client – this configuration requires the primary extension be configured as the extension for the client.

The page shown below will display in the browser. Click on the Get Started button to install the application.

NOTE: When starting the Desktop Client for the first time from IE10, the application will be blocked and a Windows Smart Screen message will be displayed noting "Windows protected your PC". There is an option to Run Anyway; select that option to continue.

Log in

a. Enter the user name and password

NOTE: The system may require a password change after the first successful log in. If the user account is configured to use Windows Authentication it will not require the user to log in

b. Auto Log In

Enter a check mark in the box to indicate the system should automatically login next time; it will use the last populated login information to automatically bypass entering your login credentials

c. Hot Desk RTP

If using the Hot Desk RTP feature, users must select the Hot Desk checkbox

NOTE: The first time the Hot Desk checkbox is selected, the Port combo box will be blank

Click the Refresh Ports button to query every Tracer in the system; this will populate the combo box with the Location Names of all HDRTP ports.

Select the proper Location Name to log in

NOTE: Subsequent logins will automatically populate the last selected "friendly" Location Name. Using the Refresh Ports button will populate a complete list of available ports.

d. Active Device

Your log in must be associated with at least one extension number or agent ID which is configured by the system administrator. If you are assigned multiple extension numbers, or a combination of extensions and an agent ID, the Active Device window will prompt you to select which extension or agent ID is associated with the Desktop Client session.

If you have multiple extensions or agent IDs associated with your account, you can select one of the following options:

- Agent
- Extension
- Any

This determines which specific agent ID, single extension or "any" extension is associated with the Desktop Client session. Selecting "Any" will allow you to use the Desktop Client when you have calls on any extension associated with your user log in.
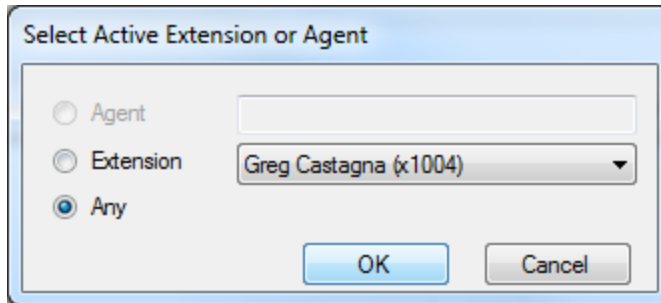
NOTE: When using this feature in conjunction with the Auto Log In option, the Desktop Client will bypass the extension selection and connect with the last selected option. To change your extension selection, you must log out, uncheck the Auto Log In checkbox, and log back in.

USING THE DESKTOP CLIENT

The OAISYS Desktop client can be used to:

- Stop or Start a recording (permission based)
- View information about a call in progress

- Add information to a live call
- Request help from a manager or participate in a coaching session
- View the Last Call or Calls

RECORDING CONTROL

The user must have permission enabled to start or stop a recording in progress.

To start or stop a recording, click on the Stop/Start button (circled below).

CALL INFO

The call information displayed on inbound and outbound calls includes the extension and outside number. Intercom call information is not displayed in the OAISYS Desktop Client for trunk side recording.

CALL TAGGING: ADDING INFORMATION TO A CALL

Six programmable buttons are available for customization by users with permissions enabled, or a Call Manager can publish buttons per user/user group.

ADD A CUSTOM BUTTON

Click on the Add Button icon circled below to launch the Custom Button pop-up.
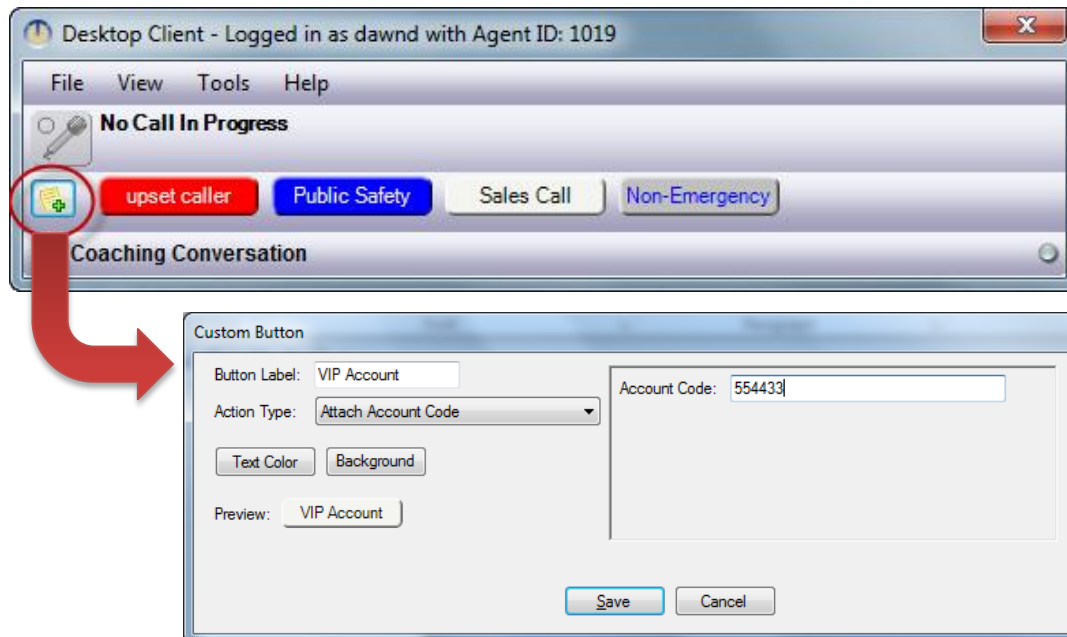
NOTE: If the icon appears grayed out that indicates the user does not have permission to add buttons or the maximum number of buttons (six) have already been programmed.

Button Label

Enter a name for the button.

Action Type

Select an option from the drop down list. (Each type will be discussed in greater detail below.)

Text Color

Select the text color for the button.

Background

Select the background color of the button (not including the text).
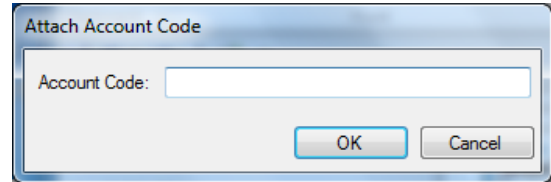
Preview

Click to see what the programmed button will look like.

ACTION TYPES

Account Code
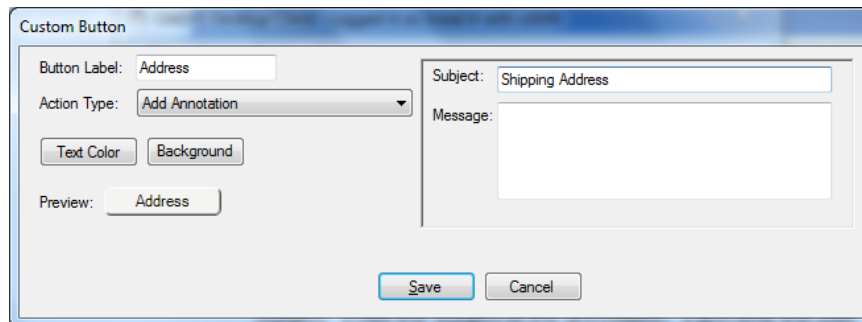
When the user clicks the corresponding button, the hard coded account code will be added to the call. However, if this field is left blank, the user will be prompted to enter an account code.

Add Annotation

When the user clicks the custom button, they are prompted to attach an annotation to the call. This information becomes part of the call and is searchable from the OAISYS Management Studio
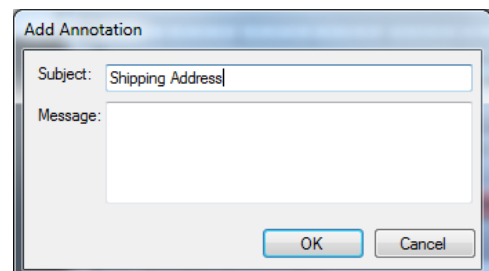
Subject

Enter the subject of the annotation. Each time the user clicks this button this subject will appear as the subject of the annotation. If left blank, the user will be able to enter any subject.

Message

Enter a message that will appear each time the user clicks the annotation button. If left blank, the user will be prompted to enter the message or body of the annotation.
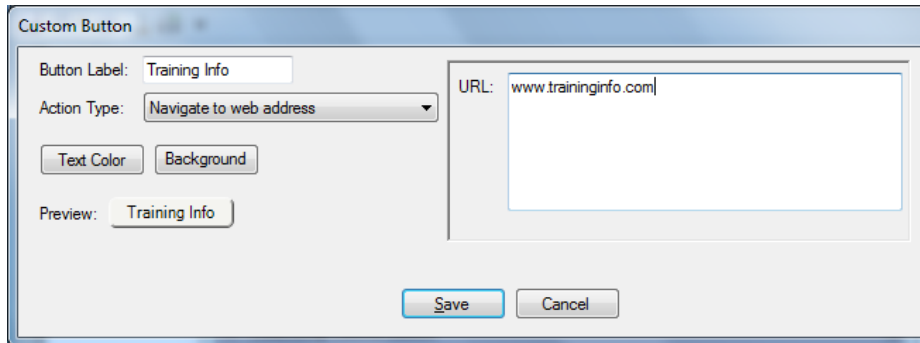
Example

The user clicks on a button called Shipping Address. Shipping Address is hard-coded as the subject, and the user would enter the address provided by the caller in the pop-up window.

Navigate to Web Address

Enter the URL so when a user clicks this button their browser will launch and they will be taken to the preprogrammed URL. This can also be programmed for a path to an important file on the PC, or a document, etc.
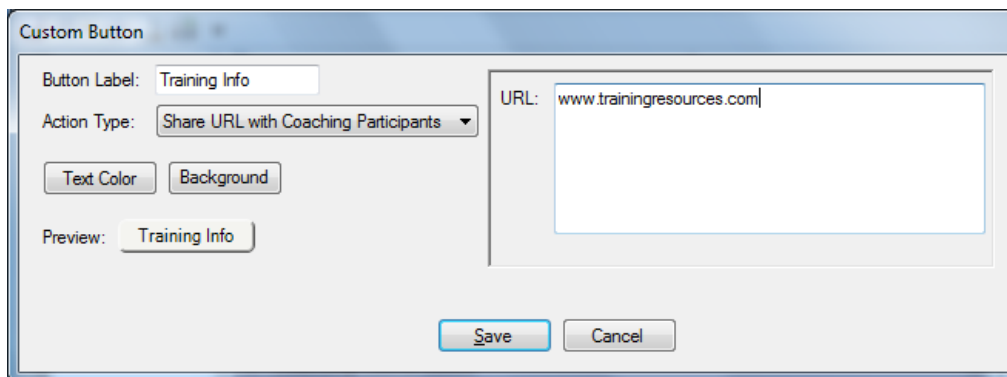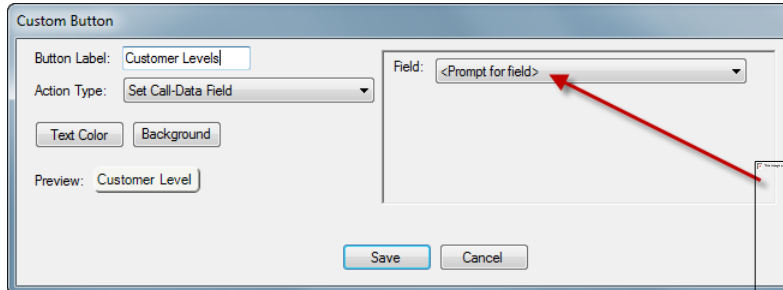

Share URL with Coaching Participants

Enter the URL so when a user clicks this button during a coaching session the coaching recipient's browser will launch and they will be taken to the URL programmed here. This can also be programmed for a path to an important file on the PC, or a document, etc.

Set Call Data Field

Select a field from the drop down list.

This can be set to Prompt for Field which will allow the user to select from the drop down list while on a call.

*Example*

Callers are identified according to customer level.

The user takes a call and clicks the Customer Level button, which then prompts the user to select the level and continue the call. The Call Manager can later run a report to see how many times their Platinum Level customers called over the past month.

NOTE: This drop-down list will be populated with fields that have been set up in the Administrator. Please refer to the OAISYS Administrator Guide for more information.

COACHING

The user can request help from Call Managers while on an inbound or outbound call.

Click the Request Help button.
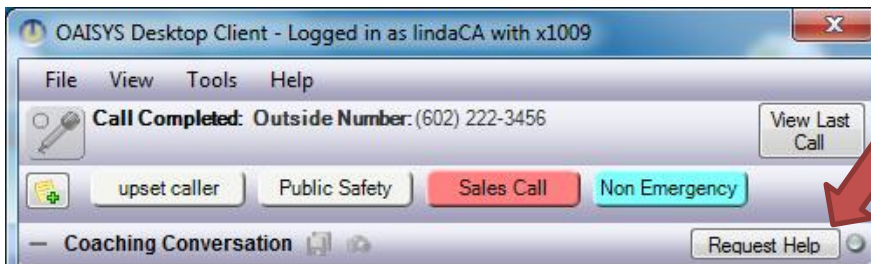
A message will go out to all Call Managers who are logged into the system.

The Call Managers can respond:

1. Ignore the Request
2. Accept the Request
3. Deny the Request
   i. If the request is denied, a reason can be entered for the file.

More than one Call Manager may accept the request from the user. The user can cancel their request at any time by clicking on the Cancel Request button which appears after a Request Help message is sent.

Click on the **+** sign to expand the coaching conversation as shown below.
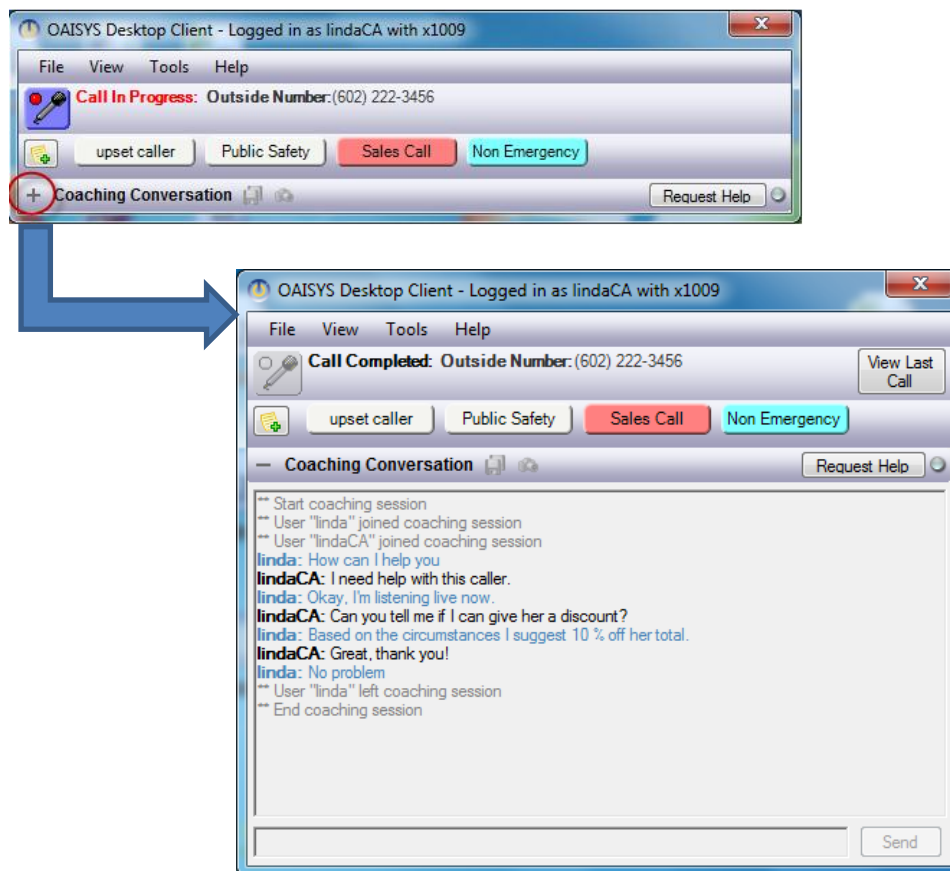
Once a Call Manager accepts the user's request, their name will appear in the Coaching Conversation. The user and Call Manager can send text messages, URLs, screen captures, and files or shortcuts to one another. The user can end the coaching session at any time.

The coaching session can continue even after the call is complete, until one of the

participants ends the session.

VIEW LAST CALL/INSTANT RECALL

The Desktop Client User can click once on the View Last Call/Instant Recall button to bring up the last call they were on in the Management Studio → Historical Calls.

This requires the user have permissions enabled to access the call, and permissions enabled to use the OAISYS Management Studio.
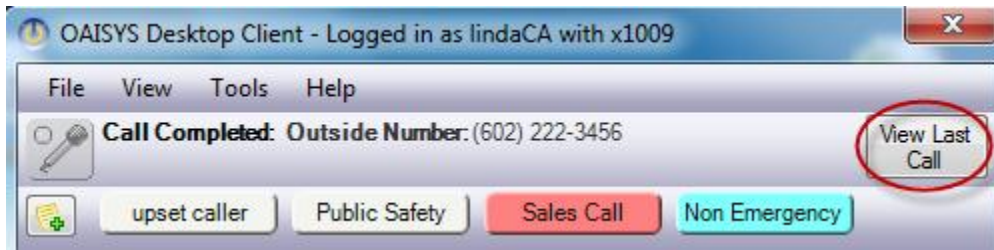
NOTE: The View Last Call/Instant Recall button can be configured to view the last call or other preconfigured options as shown here:
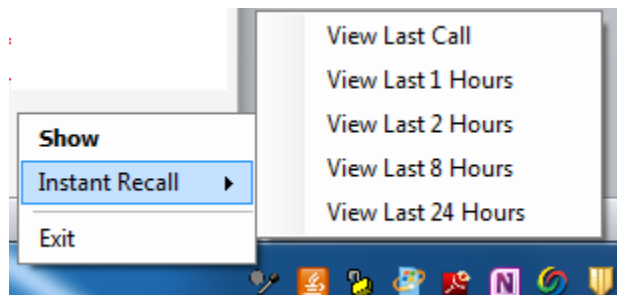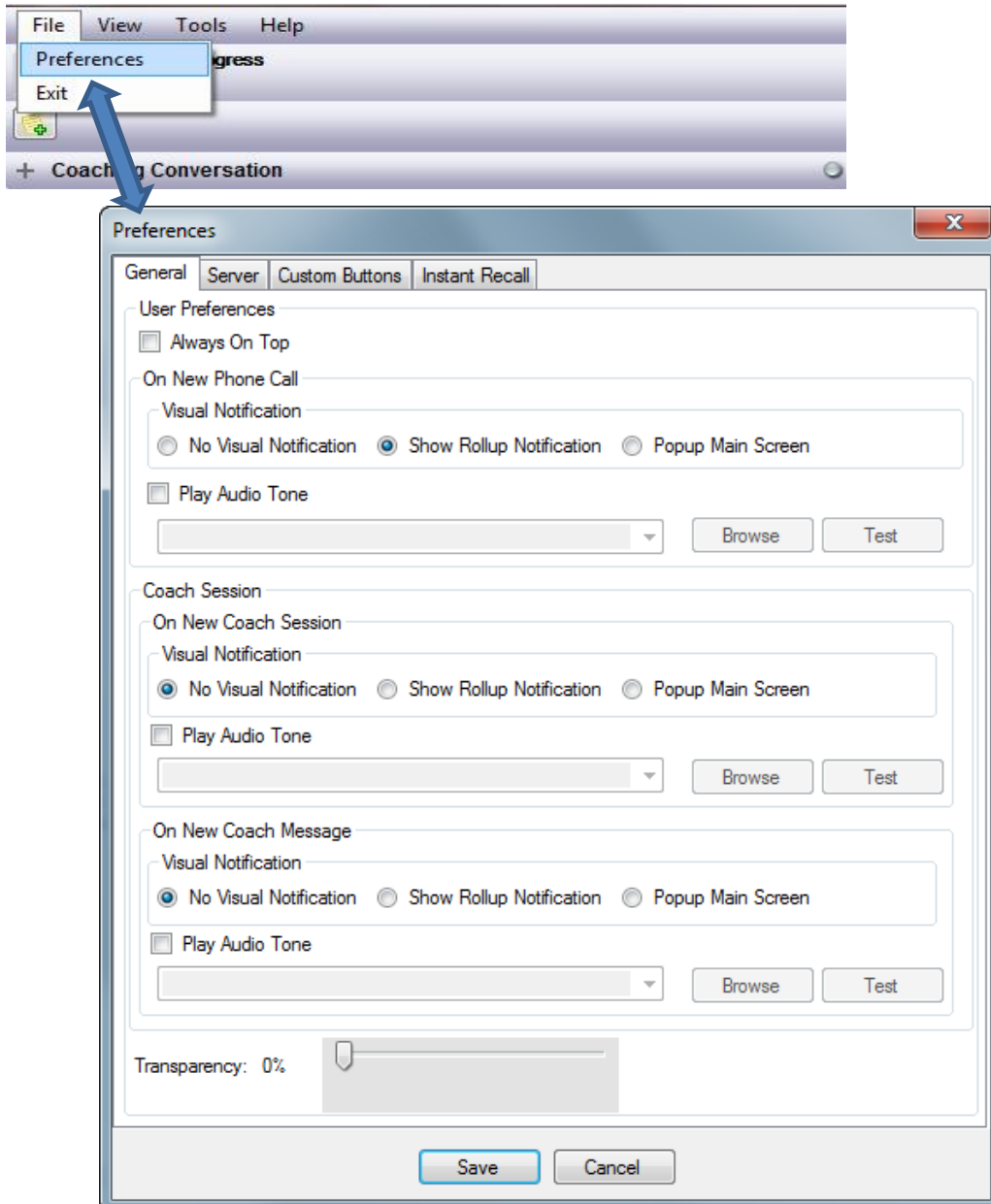
OAISYS DESKTOP CLIENT MENU

This screen provides customization of the OAISYS Desktop Client Menu preferences; each tab and selection options are discussed in further detail on the following pages.

To view or edit Preferences

Select File → Preferences

GENERAL TAB

Always on Top

Check this box to keep the OAISYS Desktop Client application on top of all other applications on the desktop.

On New Phone Call

Check the radio button to indicate the desired behavior when the user is active on a new phone call.

No Visual Notification

The application will remain displayed or in the tray. Nothing will change when a new phone call begins.

Show Roll up Notification

When a new phone call starts, the application will roll up briefly to indicate an active phone call is in progress. It will roll back down automatically.

Popup Main Screen

When a new call starts, the application will popup on your screen. It will not roll down automatically.

Play Audio Tone

Play the selected tone when a new call arrives.

On New Coach Session

Check the radio button to indicate the desired behavior when a new coaching session is active.

No Visual Notification

The application will remain displayed or in the tray. Nothing will change when a new coaching session begins.

Show Roll up Notification

When a new coaching session starts, the application will roll up briefly to indicate a coaching session is active. It will roll back down automatically.

Popup Main Screen

When a new coaching session begins, the application will popup on the screen. It will not roll down automatically.

Play Audio Tone

Play the selected tone when a coaching session begins.

On New Coaching Message

Check the radio button to indicate the desired behavior when a new coaching message is received.

No Visual Notification

The application will remain displayed or in the tray. Nothing will change when a new coaching message is received.

Show Roll up Notification

When a new phone call starts, the application will roll up briefly to indicate a new coaching message arrives. It will roll back down automatically.

Popup Main Screen

When a new coaching message arrives the application will popup on your screen. It will not roll down automatically.

Play Audio Tone

Play the selected tone when a new coaching message arrives.

Transparency

Use the slider bar to indicate the desired percentage of transparency for the Desktop Client application.

SERVER TAB
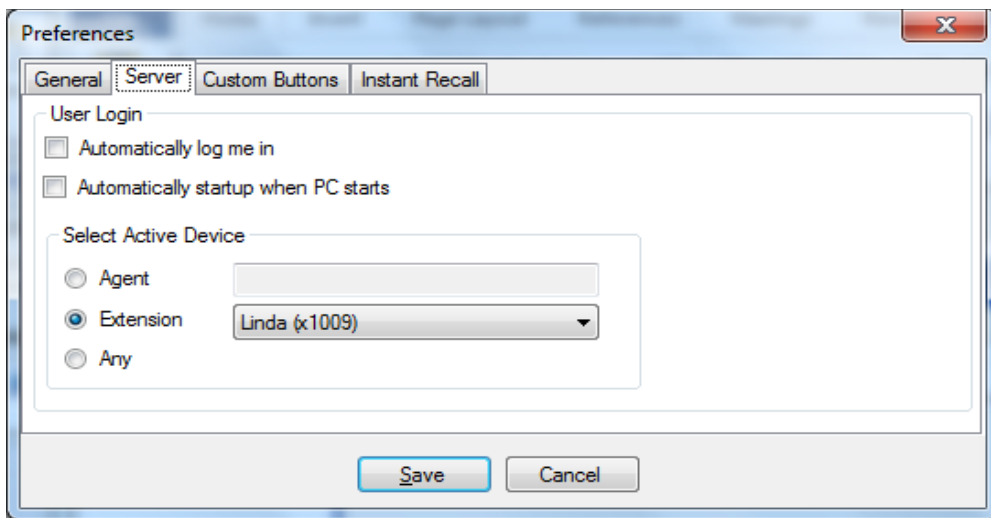
User Login

> Selections for login behavior

> *Automatically log me in*

> Check this box to indicate the system should log in automatically when the Desktop Client application starts.

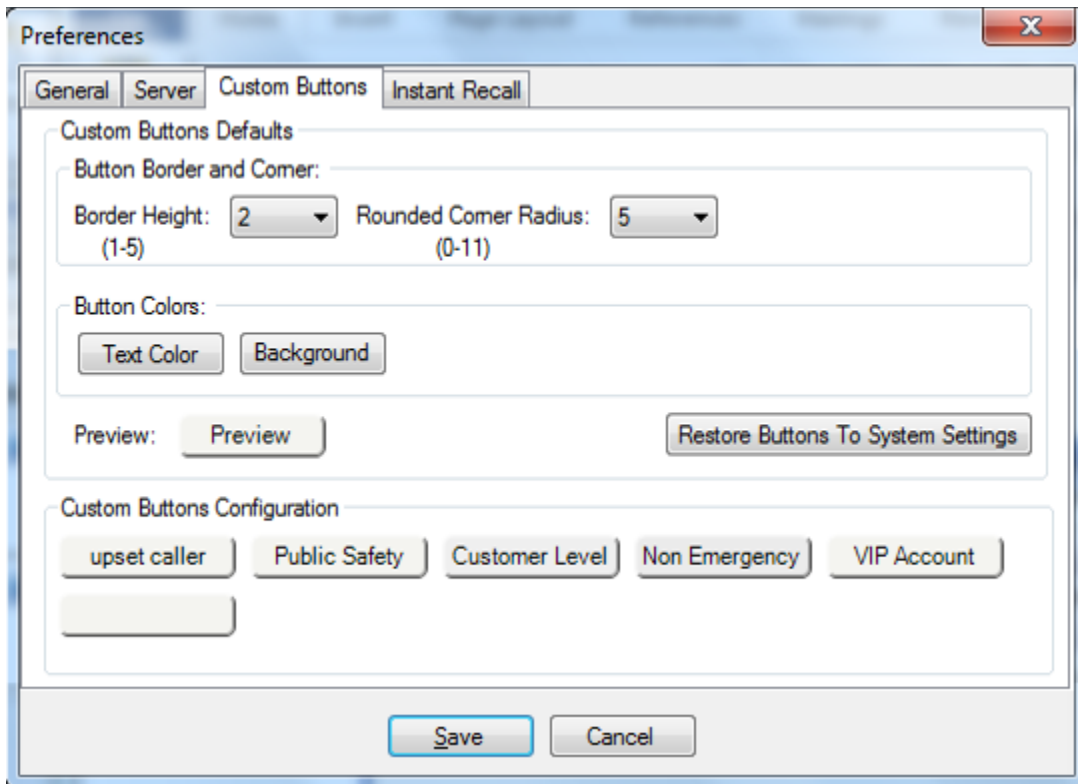> *Automatically startup when the PC starts up*

> Check this box to indicate the Desktop Client application should start up automatically when the PC starts.

Select Active Device

> Select the device type to use for the Desktop Client:

> ➢ Agent

> ➢ Extension

> ➢ Any

CUSTOM BUTTONS TAB

Custom Buttons Defaults

Select the desired height for the button borders and corners.

➢ The height can be from 1 to 5

➢ The radius can be from 1 to 11

Button Colors

Text Color
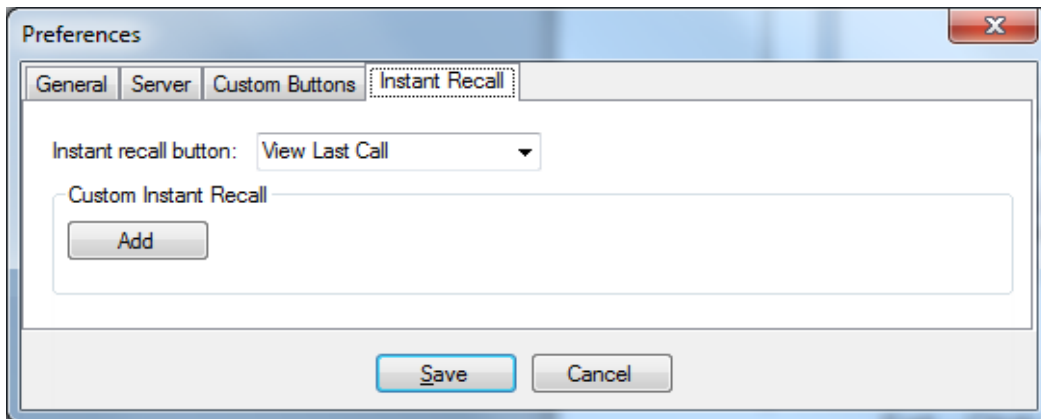
Select the color for the text display on the buttons

Background

Select the color for the background display on the buttons.

Preview

Click Preview to view a sample of what the button will look like.

INSTANT RECALL TAB
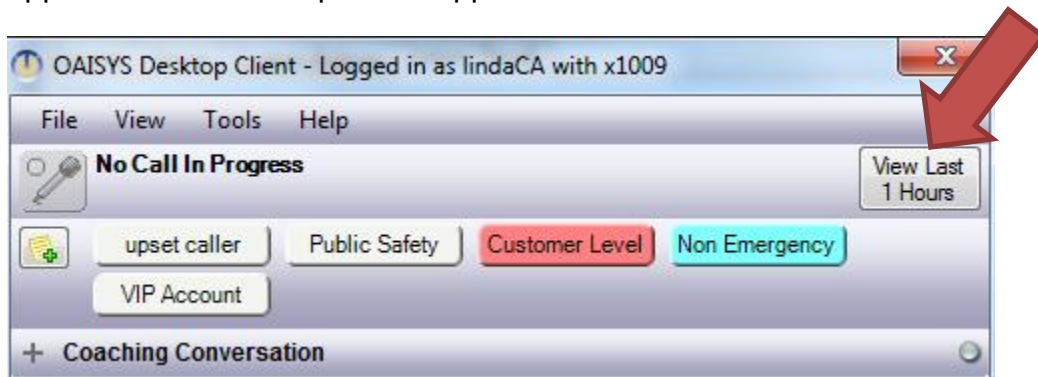

Click the Add button to configure additional timeframes for instant recall.

➢ Up to four additional time frames can be entered.

➢ The timeframe is from 1 to 24 hours.

Instant recall button

Select the timeframe to be displayed for the main Instant Recall button which appears in the Desktop Client application.

NOTE: The timeframes referenced above can be accessed at any time from the icon in the tray, and are available in the drop down list for the main Instant Recall button.
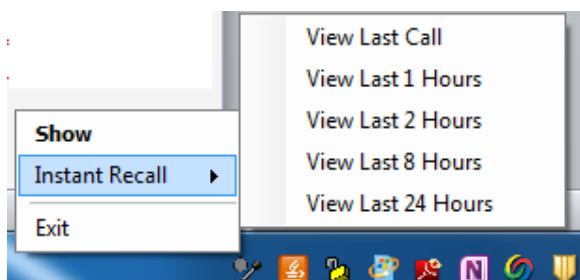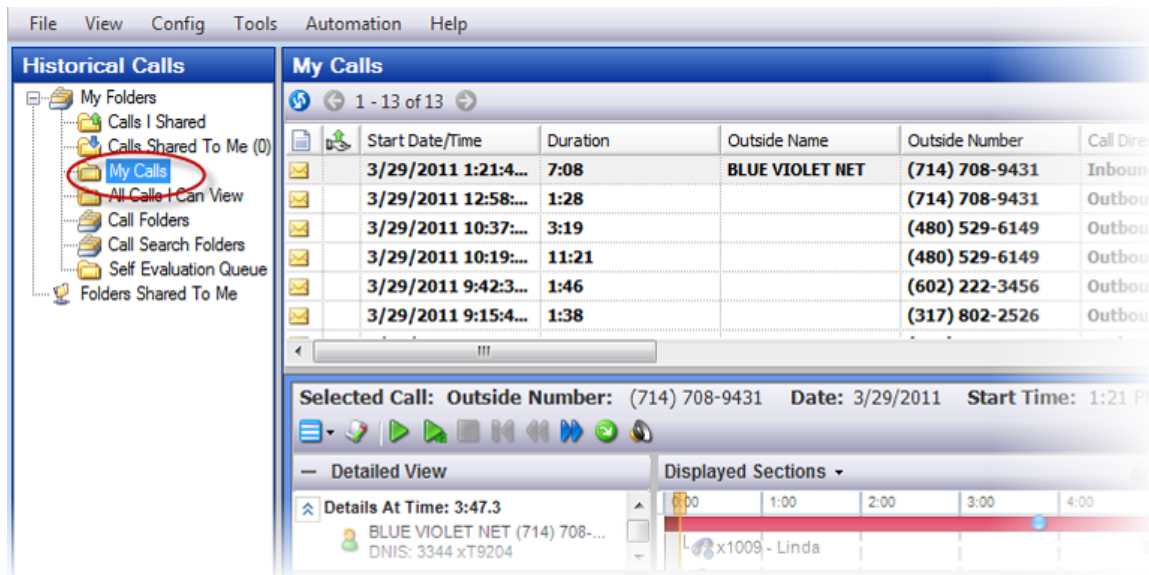
EXIT

Click once to Exit the application.

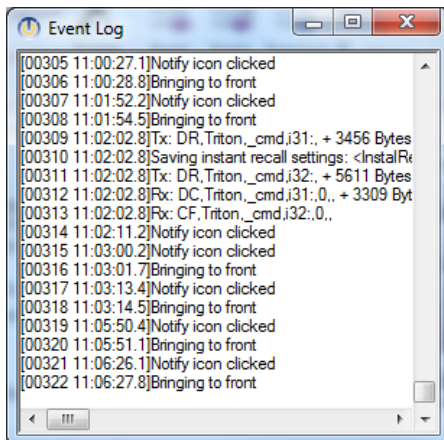**NOTE:** Users must be given the permission to exit the application by an administrator.

VIEW

CALL HISTORY

Click once to display the calls in the Historical Calls view.

EVENT LOG

This is used for troubleshooting purposes.

TOOLS

REGISTER COM INTERFACE

Click this once to register the interface that is required for some API integrations.

HELP

CONTENTS

Display the contents of the OAISYS Desktop Client application.

ABOUT

Display the current version information.