

Desktop Client Application User Guide

Version 8.x

3/04/2014

Americas Headquarters OAISYS

7965 S. Priest Drive, Suite 105

Tempe, AZ 85284

www.oaisys.com

(480) 496-9040



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.



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



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

Login to http Login to http	System Authentication Bruce	Deskt Clients	<i>ာိုAISYS</i> စဉ	

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.

PAIS	YS	
	Select Active Extens	ion or Agent
	 Agent Extension Any 	Greg Castagna (x1004) 🔻

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.

Cancel

OK



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).

OAISYS Desktop Client - Logged in as lindaCA with x1009	×
File View Tools Help	
Call In Progress: Outside Number: (602) 222-3456	
upset caller Public Safety Sales Call Non Emergency	
+ Coaching Conversation 🗐 🚳	Request Help

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.



Click on the Add Button icon circled below to launch the Custom Button pop-up.

Desktop Clier	nt - Logged in as dawnd with Agent ID: 1019	3
File View	Tools Help	
No Call I	In Progress	
upset o	caller Public Safety Sales Call Non-Emergency	
Coaching C	Conversation	0
	Custom Button	
	Button Label: VIP Account Account Code: 554433	_
	Action Type: Attach Account Code	
	Preview: VIP Account	
	Save Cancel	

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.



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.

Attach Account Co	le
Account Code:	
	OK Cancel

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

Custom Button		
Button Label: Address	Subject: Shi	ipping Address
Action Type: Add Annotation	Message:	
Text Color Background		
Preview: Address		
	,	
(<u>S</u> ave C	ancel

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.

Add Annot	ation
Subject:	Shipping Address
Message:	
	OK Cancel



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.

Custom Button		
Button Label: Training Info Action Type: Navigate to web address	URL:	www.traininginfo.com
Text Color Background Preview: Training Info		
Sa	ave	Cancel

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.

Custom Button		
Button Label: Training Info	URL:	www.trainingresources.com
Action Type: Share URL with Coaching Participants		
Text Color Background		
Preview: Training Info		
<u>S</u> a	ive	Cancel



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.

Custom Button	
Button Label: Customer Levels	
Action Type: Set Call-Data Field	
Text Color Background	
Preview: Customer Level	
,	
Save Cancel	
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.

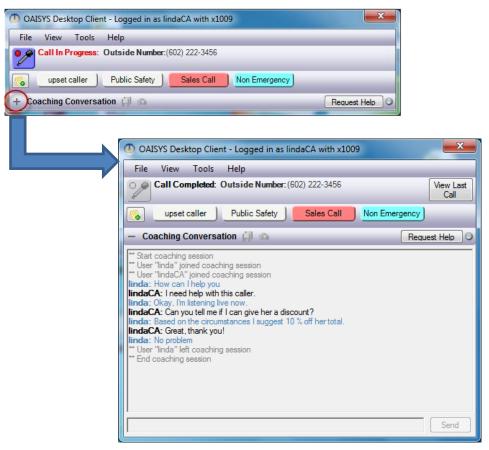


The Call Managers can respond:

- 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



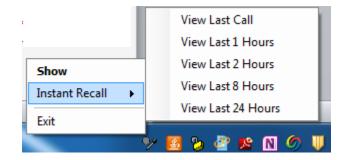
VIEW LAST CALL/INSTANT RECALL

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 \rightarrow Historical Calls.

This requires the user have permissions enabled to access the call, and permissions enabled to use the OAISYS Management Studio.

File	View Too	ols Help				-
	Call Complet	ed: Outsid	le Number: (602) 222-3456		View Las
						Call
4	upset caller) Publ	ic Safety	Sales Call	Non Emergency	-

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

ile View Tools Help
Preferences gress
Exit
Coach g Conversation O
Preferences
General Server Custom Buttons Instant Recall User Preferences
Always On Top
On New Phone Call
Visual Notification
No Visual Notification Show Rollup Notification Popup Main Screen
Play Audio Tone
Browse Test
Coach Session
Visual Notification
No Visual Notification Show Rollup Notification Popup Main Screen
Play Audio Tone
Browse Test
On New Coach Message
Visual Notification
No Visual Notification Show Rollup Notification Popup Main Screen
Play Audio Tone
Browse Test
Transparency: 0%
Save Cancel



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.



Preferences	x				
General Server Cus	tom Buttons Instant Recall				
User Login					
Automatically log r	ne in				
Automatically startup when PC starts					
Select Active Devic	e				
Agent					
Extension	Linda (x1009) 🔹				
C Any					
	Save Cancel				

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



Preferences								
General Server Custom Buttons Instant Recall								
Custom Buttons Defaults								
Button Border and Comer:								
Border Height: 2 Rounded Comer Radius: 5 (1-5) (0-11)								
Button Colors:								
Text Color Background								
Preview: Preview Restore Buttons To System Settings								
Custom Buttons Configuration								
upset caller Public Safety Customer Level Non Emergency VIP Account								
<u>Save</u> Cancel								

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

Preferences
General Server Custom Buttons Instant Recall
Instant recall button: View Last Call Custom Instant Recall Add
<u>Save</u> Cancel

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.

File	View Tools	Help			-
2	No Call In Progre	* \$\$			View Last 1 Hours
4	upset caller	Public Safety	Customer Level	Non Emergency	
	VIP Account				

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.

	View Last Call				
	View Last 1 Hours				
Show	View Last 2 Hours				
Instant Recall 🔹	View Last 8 Hours				
- Exit	View Last 24 Hours				
	y 🖪 🔈 🔐 🕿 🛯 Ø 🔰				



EXIT

Click once to Exit the application.

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

VIEW

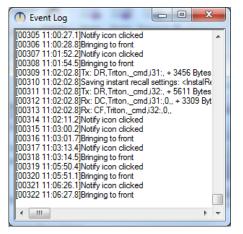
CALL HISTORY

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

File View Config Tools			_	_	_	_	_	_	
Historical Calls	My Ca	ills							
My Folders Models I Shared	🚱 🔇 1 - 13 of 13 🜍								
Calls Shared To Me (0)		Start Date/Time	Duration	0	utside Name	Outs	ide Number	Call Dire	
My Calls		3/29/2011 1:21:4	7:08	BI	UE VIOLET NE	T (714) 708-94 31	Inbour	
Call Folders Call Folders Call Folders Call Search Folders Call Search Folders Self Evaluation Queue		3/29/2011 12:58:	1:28			(714) 708-9 431	Outbou	
		3/29/2011 10:37:	3:19			(480) 529-61 49	Outbou	
		3/29/2011 10:19:	11:21			(480) 529-61 49	Outbou	
		3/29/2011 9:42:3	1:46			(602	2) 222-3 456	Outbou	
_		3/29/2011 9:15:4	1:38			(317) 802-2 526	Outbou	
	•								
	Selected Call: Outside Number: (714) 708-9431 Date: 3/29/2011 Start Time: 1:21 □ • > <								
	– Detailed View D			Displayed	isplayed Sections -				
	Reta 2	BLUE VIOLET NET (7 1 DNIS: 3344 xT9204	14) 708	L 28 x10	1:00 09 - Linda	2:00	3:00	4:00	

EVENT LOG

This is used for troubleshooting purposes.





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.