Agent Module Quick Reference Guide

The Main Form

Here is a brief outline of what you will see in the Agent Module's main form.

Menu Bar - Here you can use the File, Edit, Information, & Help options to reach further settings & functions.

Minimize, Maximize, Close - Here are the buttons to change the window size as well as close the program.

Change Button - The button you click to accept the change in status. **Must be clicked in order for status change to take effect.**

Status - Your current status. Available will receive ACD calls. Any unavailable status should not receive ACD calls.

Status Drop Down Menu - From here you can select what status you should be in. When you are Available, you will be sent calls.

Status Details - Here you can write what you are currently doing.

Status Detail Clear - Click this button to clear the status details you have entered.

Skills Grid - You will see the skills that are assigned to you. This will also show how many ACD calls are in queue, how many other agents are available to take calls, & how many callback messages are waiting to be handled.

Connection State - Here you will see what server your Agent Module is connected to. When connected, the text will be green. When disconnected & attempting to connect, the text will be red.

Call Statistics Grid - Here you will see statistic information regarding your calls. The *Task*, *State*, & *Status* will change as you handle calls, but you will most likely stay in the *Ready*, *Idle*, & *Available* state.

Messaging - Use this button to bring up the instant message window. Depending on individual site restrictions, you may be able to send instant messages to other agents that are logged in.

Emergency Button - This button will send an emergency message to every supervisor that is currently logged in.

Expand Window - Above is what the Agent Module will generally look like. However clicking the Expand button will not only make the Agent Module large, but show you many more statistics regarding calls in queue as well as your own calls.

Link to the T-Metrics Web Page - Click this link to be automatically directed to the T-Metrics web page.
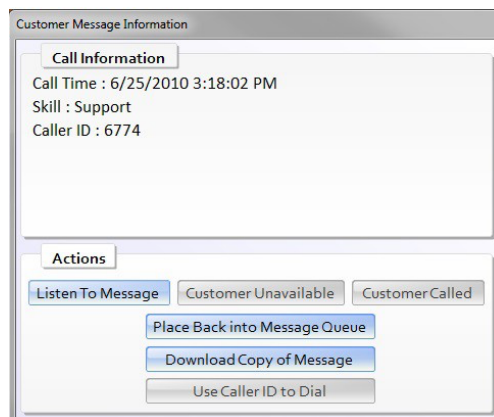
Logging On

Open the Agent Module by selecting either of the following:**Start / Programs / T-Metrics Applications / ACD Agent Module** or Double-click the **ACD Agent Module** shortcut on your desktop

Ensure the Agent Module says you are **Connected**. If it says **Attempting to Connect to Server**, contact your Supervisor or Administrator. Enter your logon name and press the **Log On** button to begin receiving ACD Calls. If your Agent logon name has been automatically entered by the ACD system, simply press the **Log On** button.

Customer Callbacks

Callbacks allow a caller to make a recorded message to take their place in the call queue. The caller may then hang up, and the recorded message will be delivered to an **Available** agent in lieu of a live phone call. When you receive a Callback Message, the Customer Message Information box will appear.

- **Call Time**: The time the phone call was made.
- **Skill**: The agent skill the message is for.
- **Caller ID**: The phone number from which the message was made.
- **Listen To Message** allows the message to stream directly to you, the recipient agent
- **Customer Unavailable** and **Customer Called** indicate the action taken by you the agent after listening to or downloading the callback message. One of these options MUST be selected after handling the message. If not, the callback message window will not close, and further calls will not be routed to your position.
- **Place Back into Message Queue** returns the message to the call queue to be routed to the next **Available** agent.
- **Download Copy of Message** downloads the file to your local computer. This is useful if you are having trouble with **Listen To Message**.

Logging Off

To log off any time of the day, change your position status to **Logged Off**. Be sure to press the **Change** button to complete the process. Afterward, close the Agent Module by selecting **File > Exit**

Sending Trouble Reports

If an issue is experienced with the ACD Agent Module, follow the directions in the screenshot below via the Help menu.

… from the Help menu.

Trouble Report for the IT Helpdesk   ✕

Trouble Report Process Description

Having trouble? We'd love to help! Please make the proper information selections below, and then write a clear and detailed description about your problem in the space provided. You have virtually unlimited space, so feel free to express yourself completely. For best results, please make this log file immediately after noticing the problem.

Once you have described your problem, choose an option from the three buttons that best describes your follow up intention. If you desire immediate follow-up from University IT Help Desk, please choose either "Send E-Mail to University IT Help Desk" or "I Will Call University IT Help Desk ". If you choose "Send E-Mail to University IT Help Desk ", an email will automatically be created for you that will be addressed to T-Metrics Support. Please feel free to add your supervisor's e-mail address to the To: or CC: fields in order to make them aware of the problem. If you choose "I will call University IT Help Desk" please contact us at 585-275-2000 or extension 52000. If you choose "I Will NOT Contact University IT Help Desk ", please be aware that your

Step 1: Enter contact information (e-mail address or phone number required)

Name:	E-mail Address:	Phone Number:
UR/URMC Username	Email@ur.rochester.edu	5857564800

Department:	Skillset (if applicable to problem):
CTS Engineering	N/A

Step 2: Choose from the following before entering the trouble report description

◯ This issue occurred within the last 30 minutes   ◯ This issue did NOT occur within the last 30 minutes

Step 3: Enter a detailed description of the trouble that you experienced (20 character minimum)

Ticket Number (Optional):

Step 4: Choose your follow-up option

| Send E-Mail to the IT Helpdesk | I Will Call the IT Helpdesk | I Will NOT Contact the IT Helpdesk |