



USER MANUAL



ADMIN PORTAL

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1 About this document

This document is a guide with advice, guidance and examples of the use of the Zyline Administration Portal. The guide contains detailed screenshots and detailed explanations of the 4 first menu sections named queues, clients, audio and users. The other menus (forwarding, network, system and install) are described on the technical wiki, and instructions for typical values are described in the install guide, upgrade guide and on the relevant module documentation pages, available on the Zyline technical wiki.

All relevant screenshots and the online help texts from the actual portal are included in this guide, so it should not be necessary to have online access to a working Admin Portal while reading this guide.

1.1 References to other documents

The following documents supplement this guide with additional required knowledge, and should therefore be read before continuing.

1.1.1 Routing Guideline PDF on the technical wiki

The concepts for queues (call distribution) are described in the “Routing Guideline PDF”. It is recommended to read this document and to be familiar with the following concepts before continuing:

- Modes: Automatic call distribution (ACD) vs. manual mode
- “Route offered calls” vs. “Offer calls before routing”
- Primary, secondary and standby agents
- Skill based routing
- Historical routing
- Caller rated routing (VIP Routing)
- Follow-Me
- Failover settings and backup queues
- Timeouts: “Manual Mode Idle”, “Unavailable Timeout” and “NoAnswer Reactivation”
- User states: Idle, unreachable, busy, wrap-up, offline
- Queue Call Limit
- Queue Priority (weight)
- Callbacks
- Queue Timeouts
- Private vs. public queues
- Opening hours (open, closing, closed)

1.1.2 Media and Announcement Guideline PDF on the technical wiki

The concepts for the use of audio files and announcements are described in the “Media and Announcement Guideline PDF”. It is recommended to read this document and to be familiar with the following concepts before continuing:

- Flow diagram – general announcements
- Flow diagram – callback announcements
- Queue waiting announcements (welcome, adhoc, custom, new calls, returned calls, private)
- Announcement repetition and frequency
- Position announcements
- Closure and Failover Announcements
- Call-back announcement
- Pickup and personal announcement

- Language
- Music on hold
- Audio file formats and uploading
- Dial-in recording (announcement recording)

1.1.3 Installation guide on the technical wiki

It is recommended to read the installation guide (and optimally follow it and make a real installation) to be familiar with the following concepts before continuing:

- Basic architecture of a Zylinc solution.
 - Windows Application Server and its roles
 - ZyCall Switch Linux Server and its roles
 - Microsoft SQL Server and its roles. “ZyDB” and “ZyStatDB” databases.
 - Apache Tomcat webservers on both servers and their different roles
 - Zylinc related Windows Services and their different roles
- Setup and installation concepts including Zylinc Deployment Manager
- Basic configuration of the “Network”, “System” and “Install” menus in the Admin Portal
- Enabling the minimum required Admin Portal features. Portal Configuration.
- Promote the built-in administrator into an agent
- Adding a ZyDesk profile
- Adding a Queue
- Assigning an Agent (the built-in administrator) to a Queue
- Create a basic Wallboard

It is also assumed that the installation guide was followed when the Zylinc environment was installed. This ensures that:

- The minimum set of required modules are installed.
- The installed modules are configured up to at least the minimum required level, and able to run at a basic level and provide basic functionality.
- The minimum set of required features are enabled and pre-configured with their required data and default values.
- The installation was validated for common errors via the validation script in the install guide.

1.1.4 Upgrade guide on the technical wiki

It is assumed that the upgrade guide was followed if the Zylinc environment has been upgraded from a previous version. This ensures that:

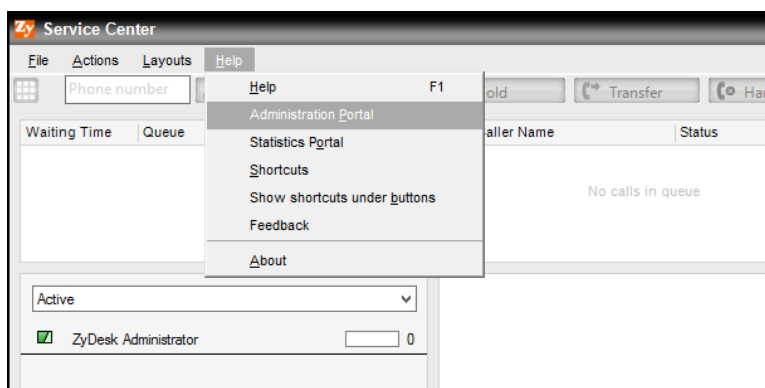
- New required modules are added and configured correctly.
- Changed modules and features are upgraded correctly.
- The upgrade was validated for common errors via the validation script in the upgrade guide.

2 General information about the Admin Portal

The Admin Portal is a web portal that can be accessed via a web browser. It runs in Java on an Apache Tomcat webserver, which is a part of the Zyline solution and the installation guide includes instructions about how to install and access it.

2.1 URL and username/password to access the Admin Portal

If the system is correctly installed, the URL to access the portal should automatically open in the default web browser, when you select the Menu / Help / “Administration Portal” from the ZyDesk Client.

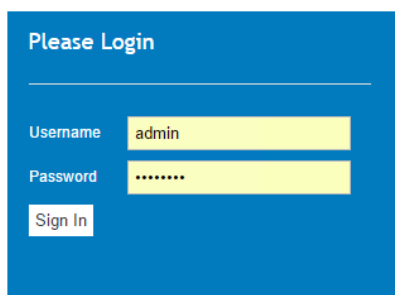


If this does not work, then the typical URL will be:

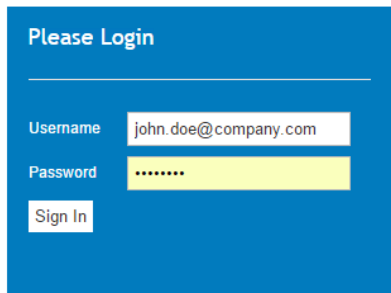
`http://<ZyCall_Switch_Server>:8080/zyline-admin/`

For system maintenance or during installations or upgrades, you can access it from a web browser directly on the Zyline Windows Application Server and log in with the special Tomcat “admin” user, which have unrestricted access to all parts of the portal. This username is “admin”. The password for this “admin” user is referred to as *SwitchTomcatPwd* in the installation guide, if the portal is installed on the ZyCall Switch Linux Server. If the portal is installed on a Windows Server, the password is referred to as *WinTomcat8080AdminPwd* in the installation guide.

The “admin” login will also work when not accessing the Admin Portal directly on the server.



After installation and configuration of a user sync module, additional users can be added, and if your account is enabled for access, you can log in with your normal e-mail address and your normal password.

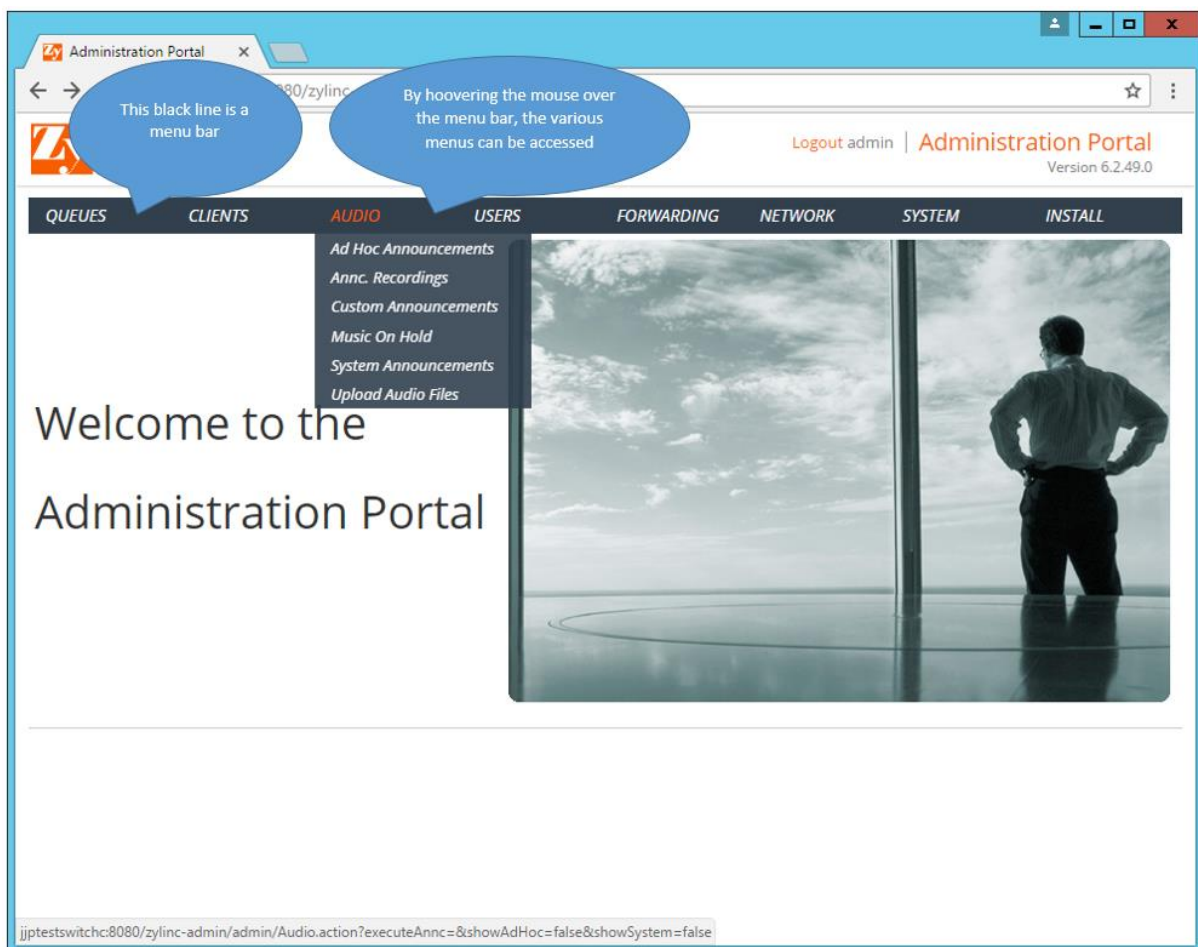


Please Login

Username

Password

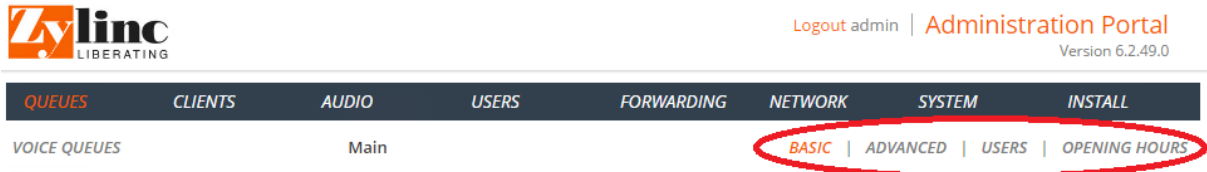
After logging in, you should see the welcome page, which looks like this:



2.2 Menu structure, pages and subpages (tab sheets)

The black line is a menu bar. The menus can be accessed by hovering the mouse pointer over the various menus.

Each menu will take you to the main page for the relevant function. That main page may have additional subpages (tab sheets), which cannot be accessed directly from the menus.



Basic Settings:

Name: ? Number: ?

Queue Display Name: ? Colour Code: ?

Public Queue: ?

Call Distribution:

In this case, you can see that the “Main” voice queue” page has 4 subpages available named “basic”, “advanced”, “users” and “opening hours”. The subpage named basic is currently selected since it is highlighted in a brighter (orange) color.

You can click on the other subpages (tab sheets) to access them.

2.3 Deep link shortcuts from lists to subpages (tab sheets)

In many lists, deep link shortcuts can take you directly to the relevant subpage.

The screenshot shows a table of voice queues. The table has columns: Display Name, Name, Number, Weight, Users, and Lang. There are three rows of data. To the right of each row, there are five icons: a document, a list, a person, a clock, and a trash can. These icons are circled in red. Below the table, there is a link 'Add Voice Queue'.

Display Name:	Name:	Number:	Weight:	Users:	Lang:
Accounting Voice Queue	Accounting	765432	1	0	en
Main number voice queue	Main	91361	1	1	en
Sales voice queue	Sales	1234	1	0	en

Bulk administration of queue settings

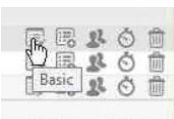
[Add Voice Queue](#)

In this example, you can see 5 icons to the right of each voice queue.



These icons are deep link shortcuts that take you directly to the relevant subpage for that queue.

When you hover the mouse pointer over each icon, you will see the name of the subpage that the deep link shortcut will take you to when you click on it.



In this case, you can see that the first shortcut will take you the subpage named “basic”, since the mouse pointer is hovered over the first shortcut icon.

2.4 Sort list contents by clicking on column headers

Display Name:	Name: ▲	Number:	Weight:	Users:	Lang:	
Accounting Voice Queue	Accounting	765432	1	0	en	   
Main number voice queue	Main	91361	1	1	en	   
Sales voice queue	Sales	1234	1	0	en	   

Bulk administration of queue settings    

The default sort ordering for lists are “A-Z” sort order, ordered by the first column.

In many lists, you can change this sort ordering, and re-sort the list based on another column, simply by clicking on the column headers.

An up or down arrow icon ▼ ▲ will appear to show that the list is now sorted by this column, and to show the selected sort ordering, which can be either up or down (A-Z or Z-A).

If no arrows are visible, the sort ordering is the default, as described above.



2.5 Online help texts and question mark icons



On-line help texts are available on almost all settings in the Admin Portal.


QUEUES
CLIENTS
AUDIO
USERS
FORWARDING
NETWORK
SYSTEM
INSTALL

VOICE QUEUES Main BASIC | ADVANCED | USERS | OPENING HOURS


Basic Settings:



Name:  Number: 

Queue Display Name:  Colour Code: 

Public Queue: 

Call Distribution:


Distribution: 

Historical Routing:  minutes 

Help ✕





If checked this Queue is considered public and will be visible in all clients.

Note: This setting can be used to hide Test queues or other types of queues that are only relevant for people subscribing to the queue.

When you click on an  icon next to a setting, a pop-up window will show the help text for the relevant item.

The help texts are also included next to the screenshots in this document. This gives a better overview of all the settings available for a specific function, than when using the portal directly; where only one help text can be expanded at a time.

2.6 Adding and removing entries to a list via left/right arrows or +/- icons



A general concept used all around the Admin Portal, is that entries can be added or removed from a list via left/right arrow icons   or via +/- icons  .

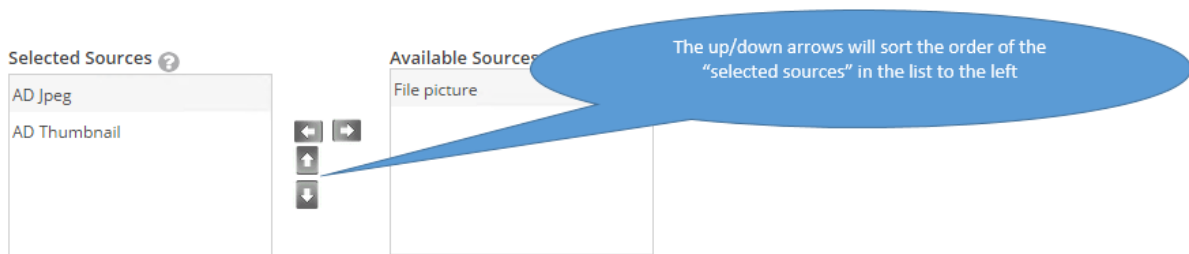
The left/right icons typically removes the list entry from the master list (to the left) so it can only be used once.

The +/- icons typically adds or deletes the entry without removing it from the master list (to the left), so re-use is possible.



2.7 Sorting entries in a list via up/down arrows or drag and drop


The up/down arrow icons   are generally used to move items in a list up or down to change their prioritizations in lists.



Some lists can also be sorted by using drag-and-drop on the elements in the list.

2.8 On-mouse-over shows additional info in many lists

In many lists, additional information will be available when hovering the mouse over elements.

This is an example of additional info that appears when hovering the mouse over the info icon  in a list:



Here is another example of extra information that is displayed when hovering the mouse pointer over a user:



2.9 Access to Admin Portal features can be disabled or restricted

This guide covers all available pages and settings of the entire Admin Portal product.

Various menus, submenus, pages and subpages can be disabled, so you may be unable to access or change some of the settings described in this document.

Even individual settings may be disabled or made read-only.

The next chapters explains the different mechanisms to disable access to various parts of the Admin Portal.

2.9.1 Disabling Admin Portal features via “Portal Configuration”

The special page “Admin Portal / Install / Portal Configuration” allows you to enable or disable various parts of the Admin Portal.

The screenshot displays the Admin Portal configuration interface. At the top, there are navigation tabs: QUEUES, CLIENTS, AUDIO, USERS, FORWARDING, NETWORK, SYSTEM, and INSTALL. Below these is a 'PORTAL SETTINGS' section with a grid of checkboxes for various features. A dropdown menu is open over the 'INSTALL' tab, showing options: Database Connection, Monitoring Configuration, Network Overview, License, IVR Script, IVR Menu, Queue Alarms, Server Settings, Portal Configuration (highlighted in orange), and Server Logs.

Pages:

Category	Feature	Feature	Feature	Feature	Feature
Queues	<input checked="" type="checkbox"/> Wallboard	<input checked="" type="checkbox"/> CallBacks	<input checked="" type="checkbox"/> Dial Lists	<input checked="" type="checkbox"/> Queue Advanced	<input checked="" type="checkbox"/> Per...
	<input checked="" type="checkbox"/> Voice Queues	<input checked="" type="checkbox"/> Chat Queues	<input checked="" type="checkbox"/> Mail Queues		
Audio	<input checked="" type="checkbox"/> Annc. Recording				
Users	<input checked="" type="checkbox"/> Admin Roles				
Client	<input checked="" type="checkbox"/> Absence Templates	<input checked="" type="checkbox"/> Activity Templates			
Forwarding	<input checked="" type="checkbox"/> Forwarding	<input checked="" type="checkbox"/> Spoken Absence			
Network	<input checked="" type="checkbox"/> Messaging	<input checked="" type="checkbox"/> Mobile Status	<input checked="" type="checkbox"/> BroadWorks	<input checked="" type="checkbox"/> Cisco	
	<input checked="" type="checkbox"/> Directory Sync	<input checked="" type="checkbox"/> Exchange Sync	<input checked="" type="checkbox"/> Google Sync	<input checked="" type="checkbox"/> SIP Presence	<input checked="" type="checkbox"/> XMPP
	<input checked="" type="checkbox"/> Lync/SfB	<input checked="" type="checkbox"/> Zylinc Proxy			<input checked="" type="checkbox"/> Sametime
System	<input checked="" type="checkbox"/> Call Lookup	<input checked="" type="checkbox"/> Client	<input checked="" type="checkbox"/> ID Lookup	<input checked="" type="checkbox"/> Mobile/Web Operator	<input checked="" type="checkbox"/> SIP Trunks
					<input checked="" type="checkbox"/> SIP Account
Install	<input checked="" type="checkbox"/> Monitoring	<input checked="" type="checkbox"/> Switch Logs	<input checked="" type="checkbox"/> IVR Script		
Voicemail	<input type="checkbox"/> Zylinc Voicemail				

Integrations:

Voice Queue Handlers: Media Server BroadWorks RP

Chat Queue Handlers: Skype for Business Chat XMPP Chat

Functions:

Default Language: English

Extra: Use Time zones: Queue Directory ID: Skill Based routing: Bulk edit of users:

Allow Internal Phone: AC/CC/SC Operator

Audio Backup on upload: Prompt First

Buttons: Export, Reset, Save

It is recommended that you only enable the minimum required features according to the installation guide.

After that, you can additionally enable more of the features as needed. But generally you should not enable unneeded features.

Note that the feature availability does not depend on available licenses. Technically, it is possible to enable unlicensed features. If this is done, the unlicensed features will be visible in the Admin Portal, but may not work.

2.9.2 Disabling Admin Portal features via “Admin Roles & Privileges”

The availability of the enabled features from “Portal Configuration” (see the previous paragraph), can be further restricted on a per-user basis, via the “Admin Roles & Privileges” function.

Therefore, you may see fewer available menus, submenus, pages, subpages and even individual settings, if you log in to the portal with a restricted user.

Some settings can also be made read-only.

A user may even be restricted down to only being able to change ad-hoc announcements or queue opening hours. This is very useful, to prevent end users from changing system settings, or other settings that they not need.

The “Admin” user is always unrestricted, since it is meant for expert access during installation, upgrade and initial configuration.

For more info, see the section “Admin Roles & Privileges”.

2.10 Short overview of the 8 menus in the menu structure

This table gives a very short overview of the main purpose of each of the 8 menus in the Admin Portal:

Menu name	Short description of the menu
Queues	In "Queues", you can create and administer queues in the system, including which users are associated with which queues. This menu also gives access to administer callbacks, dial lists, IVR Menus and Wallboard configuration.
Clients	In "Clients", you can administer various settings that relates to the client software, including templates for absence, activity, appointment categories and custom presence. This menu also gives access to configure various timers and timer profiles and general settings for the clients.
Audio	In "Audio", you can upload, delete and listen to the audio messages. There are four types of audio files available: Custom announcements, ad hoc announcements, system announcements and music-on-hold. One audio announcement can be a group of similar files, recorded in different languages. The language logic will automatically play the announcement in the correct language, depending on the language settings for the queue.
Users	In "Users", you can see and administer the users of your system. You can configure their telephone settings, their access privileges in the system and their membership of queues and profiles. You can view all ZyDesk profiles in the system, and map them to users or groups.
Forwarding	In "Forwarding", you can define a set of forwarding rules and add forwarding configuration groups. This is also where you configure calendar based forwarding and spoken absence.
Network	In "Network", you can change how the system connects to other services, including telephony systems such as BroadWorks, Cisco and Skype for Business. This also includes "IM & Line state" from mobile providers, XMPP providers or SIP presence. This is also, where you connect to directory and calendar synchronization services such as Active Directory, Notes, Exchange and Office 365.
System	In "System", you can configure connection settings and other configuration options for the various components of your Zylinc solution.
Install	In "Install", you can configure various settings, which are mainly relevant during setting up and testing of the Admin Portal and your Zylinc products. Log files from the ZyCall Switch can be accessed here, and software license information and updates is accessed from here.

3 Queues

Queues are used to receive calls and to configure and handle the various call flows that the customer needs. Calls can be either voice calls, e-mails or instant messages (chats). In this document, we will refer to all of them as “calls”.

Users of the type “agent” can be added to queues and will then be able to receive calls from the queue. Other user types than “agents”, cannot be added to queues and cannot directly receive calls from the queue.

Agents must use a client type that supports the queue functionality. (Typically Attendant Console, Service Center, Contact Center and the ZyMobile app supports queues. Operator, time or web clients do not.)

3.1 Common features for all queue types (voice / mail / chat / personal)

The different queue types share many common features between them.

Since almost all of the common features are available on the voice queue type, these features will only be described in the “Voice Queues” chapter, to avoid repetition of the documentation.

The chapters for mail-, chat-, and personal queues will describe only the features unique to these queue types.

3.2 List of features supported by each of the 4 different queue types

The following features are available in the Admin Portal for each of the 4 different queue types:

Queue feature	Feature availability			
	Voice	Personal	Mail	Chat
Select users/groups for primary/secondary/standby/owner	X	-	X	X
Specify opening hours	X	-	-	X
Basic Settings: Queue name, display name and color	X	X	X	X
Basic Settings: Queue number/mail address/chat username	X	X	X	X
Basic Settings: Public queue	X	-	X	X
Call Distribution: Distribution and weight	X	-	X	X
Call Distribution: Historical routing on number/address/limit	X	-	X	X
Call Distribution: Standby user, calls/time to activate/deactivate	X	-	X	X
Call Distribution: Caller rated distribution and low priority expire	X	-	-	-
Call Distribution: Caller rated queueing	X	-	-	-
Call Distribution: Follow me priority	X	-	-	-
Call Distribution: Update Connected Line ID	X	X	-	-
Call Distribution: On mail-tag	-	-	X	-
Call Distribution: Redirect direct calls from ZyDesk	-	X	-	-
Threshold Values: Service goal and warning level	X	X	X	X
Threshold Values: Queue Limit - New Calls	X	X	-	X

Threshold Values: Queue Limit - Waiting Calls	X	X	-	-
Timers: Timeout Public	X	X	X	X
Timers: Timeout Private (Moved)	X	-	X	X
Timers: Timeout Private (Callbacks)	X	-	-	-
Timers: WrapUp time	X	X	-	-
Announcements: Primary language and language autodetect	X	X	-	-
Announcements: MoH, adhoc, custom and private (audio files)	X	X	-	-
Announcements: Chat text welcome, connected, disconnected	-	-	-	X
Announcements: Position announcement by audio files	X	X	-	-
Announcements: Chat text position announcements	-	-	-	X
Failover to voice queue/audio announcement/forwarding/trunk/IVR	X	(X)	-	-
Failover by auto-replying with text messages	-	-	-	X
Voice Queues Advanced: Call lookup, reason codes, callback, survey...	X	-	-	-

3.3 Voice Queues

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES							
Display Name:	Name:	Number:	Weight:	Users:	Lang:		
Main number voice queue	Main	91361	1	1	en		
Sales voice queue	Sales	91362	1	0	en		
Support call cente voice queue	Support	91363	1	0	en		
Bulk administration of queue settings							

[Add Voice Queue](#)

Voice queues are used to handle the call flow of voice calls that typically originates from a phone system. Therefore, we can see that each queue has been assigned a different phone number.

Voice queue settings are split into 4 different Admin Portal pages (tab sheets) for each queue.

Basic Advanced Users Opening hours

A delete button is also available, to delete a queue.

Each shortcut button is a deep link that will take you directly to the relevant subpage (tab-sheet) for the relevant function. This requires fewer clicks than first clicking on the queue and then on the subpage for the function.

3.3.1 Voice Queue Basic

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES		Main				BASIC ADVANCED USERS OPENING HOURS	

3.3.1.1 Basic settings

Basic Settings:	
Name:	Main ? Number: 91361 ?
Queue Display Name:	Main number voice queue ? Colour Code: <input type="text"/> ?
Public Queue:	<input checked="" type="checkbox"/> ?

Name: The name to uniquely identify the queue

Number: The number to reach the queue. Make sure this number is routed to the ZyCall Switch (or similar queue handler). If a number is routed to the ZyCall Switch and matches the value in this field, the switch will pick up the call and queue it (play welcome announcement etc). You can use the “asterisk tail” command on the switch to see how the number looks after being routed to the switch. The number may have been normalized and country codes may have been added or deleted. The number specified in this field must match the number as seen in the “asterisk tail” command)

Queue Display Name: The display name for the queue. This can for example be a text describing the queue or the number or associated user. If left empty the Queue Name is used.

Color Code: The color code used for this queue by clients to display differences between queues in the queue overview. If left empty no color-coding is used.

Public Queue: If checked this queue is considered public and will be visible in all clients. Note: This setting can be used to hide test queues or other types of queues that are only relevant for people subscribing to the queue.

3.3.1.2 Call Distribution

Call Distribution:	
Distribution:	Longest idle ? Weight: 1 ?
Historical Routing:	On Number: - default - ? Limit: <input type="text"/> minutes ?
Caller Rated Distribution:	<input type="checkbox"/> Enable ? Low prio expire: Never ?
Caller Rated Queueing:	Never ?
Follow Me Priority:	<input type="checkbox"/> Automatic ?
Update Connected Line ID:	System Default ?
Standby User - Calls:	Activate: 5 ? Deactivate: 3 ?
Standby User - Sec.:	Activate: 0 ? Deactivate: 0 ?

Distribution: The call distribution algorithm to use for this queue when users are in automatic mode. Possible values are: Longest idle - Calls are distributed to the user that has been idle for the longest time. Round robin – Calls are distributed to each user circular order. The distribution does not depend on idle time.

Weight: Queue Weight can be used to prioritize queues. The weight decides how frequent the system distributes calls from a queue to agents in automatic mode. Calls in queues with weight none are always served last, regardless of waiting time. Example: If Queue A's Weight=2 and Queue B's Weight=6 and

both have a call that has been waiting for 10 seconds, then the call from Queue A will have a total weight of 20 (2×10) and the call from Queue B will have a total weight of 60 (6×10), i.e. the call from Queue B will be distributed first.

Historical Routing On Number: Can be default, enable or disable. If default is selected, the settings from Admin Portal / Clients / General Settings are used. If enable or disable is selected, this “general setting” can be overruled on a per-queue basis.

Historical Routing Limit x minutes: If enabled, calls received from the same number will be distributed to the previous handling agent, if this agent is currently logged-in and active on the queue. The limit defines how long back in time the system should look for the user. A limit of 0 means that there are no limit. Note: Waiting calls in the queue will be overtaken if distributed due to historical routing.

Caller Rated Distribution Enable: If checked calls will be distributed according to the priority of the caller. Note: If the calling number is not defined with a priority, this setting has no effect.

Caller Rated Distribution Low prio expire: Defines how long callers with low priority (less than 0) should be considered as lower than callers with priority 0. This time-out can be used to avoid starvation of callers with low priority.

Caller Rated Queueing: Whether to move calls to another queue, if one is defined for the caller. Possible Values are: Never - Functionality disabled. If Available - Only move call, if the target queue is open and monitored. Always - Always move the call, regardless of the status of the target queue. Note: If the calling number is not defined with a queue name, this setting has no effect.

Follow Me Priority: If checked, users in follow-me mode are treated as automatic, i.e. calls will be distributed to a follow-me user even if a manual user is available.

Update Connected Line ID: Decides if the Line ID should be updated with the agent/receptionists line ID after a call has been distributed and connected. This setting can be used for example to hide an Agents caller ID for a customer. System Default - Use the system default (Admin Portal / System / Switch Settings). Yes - Update ID. No - Do not update ID

Standby User – Calls. Activate value / deactivate value: The threshold value for how many calls should be in a queue for standby users to become active and inactive. A value of 0 in activate disables the threshold. Note: If no other users are handling the queue, standby users are always activated independent of this setting.

Standby User – Sec. Activate value / deactivate value: The threshold value in time/seconds for standby users to become active and inactive. If one or more calls have waited in the queue for longer than the specified time, standby users become active. A value of 0 in activate disables the threshold. Note: If no other users are handling the queue, standby are always activated independent of this setting.

3.3.1.3 Threshold Values

Threshold Values:

Queue Limit - New Calls: calls or No limit ?

Queue Limit - Waiting Calls: seconds or No limit ?

Service Goal: seconds ? Warning Level: calls ?

Queue Limit - New Calls: The maximum allowed queue length. If the maximum length is reached, new incoming calls will handled according to the “failover - queue open” settings. Enable the “No limit” checkbox to disable the queue “new calls” limit.

Queue Limit - Waiting Calls: The maximum allowed time a call could be waiting in the queue. If the maximum time is reached for a waiting call, this call will be handled according to the “failover - queue open” settings. Enable the “No limit” checkbox to disable the queue “waiting calls” limit.

Service Goal: The service goal for this queue, i.e. the goal used by statistics and wallboard to indicate if calls waiting in the queue have waited longer than the service goal for this queue.

Warning Level: The threshold value for when a warning is indicated in the client. If set to 0 a warning is never shown due to this threshold. If there is no limit on new calls and the warning level is bigger than zero, then queue limit will be set to twice the warning level.

3.3.1.4 Timers

Timers:	Public	Private (Moved)	Private (Callbacks)
Timeout:	- default - ?	- default - ? - default - Never 1 sec 5 sec 10 sec 20 sec 30 sec 45 sec	- default - ?

Each of these timers can be either “default” or be or individually selected to a specific value. If “default” is selected, the value from Admin Portal / Clients / Global Timers are used. If not, each timer can be individually overridden on a per-queue basis.

Public timeout: The interval for how long calls are kept in a queue after the last user has logged off the specific queue.

Private (Moved) timeout: The interval for how long calls that has been placed in the private queue by another user are kept before they are publically available.

Private (Callbacks) timeout: The interval for how long callbacks are kept in the private queue before they are publically available. Note: Callbacks can only be in a private queue if they have been transferred from another agent before dial out.

3.3.1.5 Announcements

Announcements:		
Language, Primary:	English ?	Autodetect: <input type="checkbox"/> ?
Music on hold:	default ?	Answered: - no difference - ?
Welcome announcement:	- None - ?	
Adhoc announcement, Welcome:	- None - ?	
Adhoc announcement, Queue:	- None - ?	
Custom announcement, New Calls:	- None - ?	Frequency: 30 sec ?
Custom announcement, Returned Calls:	- None - ?	Frequency: 30 sec ?
Private announcement:	- None - ?	Frequency: 10 sec ?

Language, Primary: Language used for this queue.

When you set up a queue, you need to specify a language for the queue. Only announcements whose language matches that of the queue may be used in the queue. This ensures that all announcements, which are made in the queue, are in the correct language.

Language Autodetect: If enabled, the language will be auto detected on this queue according to system settings. I.e. if the prefix of an incoming call matches a prefix in the “Language Auto-detection prefix-list” for that language, the announcement will be played in that language instead. (The prefix-lists can be found in Admin Portal / System / Switch Settings).

Music on hold: The music played when a caller is waiting in the queue.

Music on hold Answered: The music played when a caller is waiting in the queue - after the call has been answered by an agent. If set to default, the normal music on hold setting is used throughout the call.

When you select music on hold for a queue, you do not select one or more pieces of music directly. Instead, you select a group, and all music belonging to this group will be used as music on hold for the queue. When you upload a piece of music, you should therefore select a group, in which this piece of music is to be included.

Welcome announcement: The announcement played when a call enters the queue.

Adhoc announcement, Welcome: The adhoc announcement played directly after the welcome announcement.

Adhoc announcement, Queue: The adhoc announcement played when the caller enters the queue. This announcement can for example be used to inform callers about special situations such as long waiting time etc. Note: The announcement will not be played if the caller is routed directly to an agent without waiting time.

Custom announcement, New Calls: The announcement played in interval for new calls when a caller is waiting in the queue. If position announcement is enabled this announcement is played after the position announcement. Frequency: If position announcement or custom announcement is set this setting decides how often they are played.

Custom announcement, Returned Calls: The announcement played in interval for a returned call when a caller is waiting in the queue. When this announcement is played, the music is temporarily stopped. Frequency: If Custom announcement (returned calls) is set this setting decides how often it is played.

Private announcement: The announcement played in interval for a private call when a caller is waiting in the queue. When this announcement is played, the music is temporarily stopped. Frequency: If Private announcement is set this setting decides how often it is played.

3.3.1.6 Position Announcement:

Position Announcement:

Enable Position Announcement: enable ?

Pre-Position announcement: ?

Position announcement #1: ? ?

Position announcement #n, Part 1: ? ? Part 2: ? ?

Enable Position Announcement: If enabled, a position announcement is played for a new caller, informing him about the number he currently is in the queue. The repeat frequency above decides how often it is played.

Pre-Position announcement: The announcement played in interval when a caller is waiting in the queue before the position announcement is played.

Position announcement #1: The announcement being played for number 1 in queue.

Position announcement #n, Part 1: The first part of the announcement being played for callers not currently number 1 in queue. Example(s): 'You are now number 5 in queue. Please wait.' Part 2: The second part of the announcement being played for callers not currently number 1 in queue. Example: 'You are now number 5 in queue. Please wait.'

3.3.1.7 Failover - Queue Open

Failover - Queue Open: ?

Unmonitored Queue:	<input type="text" value="Queue Calls"/>	?	
Failover queue:	<input type="text" value="- None -"/>	?	
Failover Announcement:	<input type="text" value="- None -"/>	?	
Failover Forwarding:	<input type="text"/>	?	SIP Trunk: <input type="text" value="- Local Extension -"/>
Failover IVR:	<input type="text" value="- None -"/>	?	

Specifies the settings for queue failure handling, for example in the following cases:

- Queue limit reached
- Unmonitored queue
- Last user logs out

Unmonitored Queue: The action to take if a queue is open but unmonitored. Failover action - treat calls with the settings below. Queue calls - queue incoming calls (ignore settings below).

Failover queue: Alternative queue to send calls to. Settings for this queue such as language, failover settings and announcements are kept when the call is moved. Failover queues cannot be cascaded. Only the first failover queue will be used. It is possible to failover from queue A to queue B. Not from A to B to C. Note: If the transferred call should use settings from the failover queue use failover forwarding and local extension in SIP trunk instead.

Failover Announcement: Announcement to play for incoming calls. If Failover queue is also set, this announcement is only played in case that queue is unreachable (e.g. closed or no users monitoring).

Failover Forwarding: Number to forward incoming calls to. If a failure announcement is also set, this announcement will be played first. **SIP Trunk:** The SIP Trunk to use for the forwarding number (closed queue). If the number to forward to is within the Zylinc system local extension in SIP trunk should be selected.

Failover IVR: Alternative IVR to send calls to. Settings for this queue such as language, failover settings and announcements are kept when the call is moved. i.e. if the call ends up in another queue after the IVR it will use settings from this queue. Note: If the transferred call should use settings from the failover queue, use failover forwarding to the IVR number and local extension in SIP trunk instead.

3.3.1.8 Failover - Queue Closed

Failover - Queue Closed: ?

Queue:	<input type="text" value="- None -"/>	?	
Closure Announcement:	<input type="text" value="- None -"/>	?	
Forwarding:	<input type="text"/>	?	SIP Trunk: <input type="text" value="- Local Extension -"/>
IVR:	<input type="text" value="- None -"/>	?	

Specify the settings for closure handling, i.e. what to do with an incoming call outside opening hours.

Queue: Alternative queue to send calls to. Settings for this queue such as language, failover settings and announcements are kept when the call is moved. Failover queues cannot be cascaded. Only the first failover queue will be used. It is possible to failover from queue A to queue B. Not from A to B to C. Note: If the transferred call should use settings from the failover queue use failover forwarding and local extension in SIP trunk instead.

Closure Announcement: Announcement to play for incoming calls when the queue is closed. If failover queue is also set, this announcement is only played in case that queue is unreachable (e.g. closed or no users monitoring).

Forwarding: Number to forward incoming calls to. If a failure announcement is also set, this announcement will be played first.

SIP Trunk: The SIP Trunk to use for the forwarding number (closed queue). If the number to forward to is within the Zylinc system local extension in SIP trunk should be selected.

IVR: Alternative IVR to send calls to. Settings for this queue such as language, failover settings and announcements are kept when the call is moved. i.e. if the call ends up in another queue after the IVR it will use settings from this queue. Note: If the transferred call should use settings from the failover queue use failover forwarding to the IVR number and local extension in SIP trunk instead.

3.3.2 Voice Queue Advanced

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES	Main					BASIC ADVANCED USERS OPENING HOURS	

3.3.2.1 Client Settings

Client Settings:

Client Support: Allow Attendant Console: ? Allow Mobile: ?

Call Lookup: ? Use from Original Queue: ?

Call Reason Code list: Multiselect: ? Min. one selection: ?

Category: ?	Reasons: ?
<input type="text" value="Partner"/>	<input type="text" value="Support Case; General Support; S"/> Delete
<input type="text" value="Customer"/>	<input type="text" value="1'st Line; Support; Sales"/> Delete
<input type="text" value="Internal"/>	<input type="text" value="Testing; Demo"/> Delete

Add Category

Allow Attendant Console: If checked Attendant Console Clients will subscribe to this queue. If unchecked they will ignore the queue.

Allow Mobile: If checked, mobile clients will subscribe to this queue. If un-checked, they will ignore the queue.

Call Lookup: The Caller lookup configuration to use in the client for incoming calls. Note: If 'Use from Original Queue' is also set, this setting will NOT be used for calls forwarded from another queue.

Use from Original Queue: If checked the caller lookup settings from the original queue will be used - if the call was forwarded from another queue.

Call Reason Code list: A list of call reasons that will be presented to the agent when the call is ended. The agents selections will be stored in the statistics database. Multiple reasons can be configured by separating them with semicolons ;

Call Reason codes can be organized into categories. When configured with a category an agent will be presented with the reason code categories before the final reason code can be selected. Both the category and the code are stored in the statistics and as such this feature can both be used for

categorizing the agents choice as well as it can be used for customers who needs both a call resolution and a call reason code.

Multiselect: If checked the agent can select multiple values from the list.

Min. one selection: If checked the agent must select at least one reason code.

Category: The category field is mandatory if there are more than one category. If there is only one category, this field won't be saved. The ordering of categories can be rearranged by dragging and dropping. If more than one reason is provided, they should be separated by a semicolon ','.

3.3.2.2 Timers

Timers: ?

WrapUp time: seconds ?

WrapUp time: The value for how many seconds users should have between a call is ended and the next is distributed by the system in automatic mode. Note: WrapUp time is fixed in some clients - i.e. this setting is not supported by all clients.

3.3.2.3 Callback Settings

Callback Settings: ?

Start Callback Offer: Offer callback if a call is waiting in queue as number or more. ?

Offer callback if a call has waited more than seconds. ?

Stop offering callbacks minutes before the queue closes. ?

Callback Caller ID: ?

Callback Queue: ?

Callback Announcement: ?

Offer Voicemail: Enable ?

Frequency: ?

Digit: ?

Start Callback Offer: The limit for when a Callback should be offered. If set to 0 callback will not be offered based on that threshold.

Offer callback if a call is waiting in queue as number x or more: The limit for when a callback should be offered based on the amount of calls waiting in the queue.

Offer callback if a call has waited more than x seconds: The limit for when a callback should be offered based on the time the call has been waiting.

Stop offering callbacks x minutes before the queue closes: Callbacks will not be offered 'x' minutes before closing time of the queue. Example(s): If set to '15' and Queue closes at 16:00 - Callback will no longer be offered from 15.45

Callback Caller ID: Caller ID used when dialing out for a callback. If empty, the agents defined number is used.

Callback Queue: Alternative queue to send callbacks to. This setting can be used to move calls to another queue when a callback is requested. The call will then be distributed based the new queues priority. Note: Opening hours of the new queue will be ignored.

Callback Announcement: Announcement to play when a callback is being offered. Note: If default is chosen the system default corresponding to the digit choice will automatically be set.

Frequency: Decides how often the callback announcement is played.

Digit: The digit that must be entered to trigger a callback.

Offer Voicemail: If enabled the caller is offered to leave a voicemail when ordering a callback. This voicemail message can be played back the agent before the callback is made.

3.3.2.4 Digit Collection Settings

Digit Collection Announcement: Announcement to play when requesting digit collection.

Digits Max.: When this maximum is reached, no more digits are collected. Digit collection are also stopped when # is entered

Digits Timeout: Maximum allowed timeout in seconds between two digits. When reached, the digit collection restarts if at least one attempt is still left

Digits Attempts: Maximum attempt before digit collection is discarded.

3.3.2.5 Customer Survey

If customer survey has been configured, it can be activated on a per queue basis.

If activated, the system will prompt the caller before they enter the queue, and if accepted the Zyline system will request the external customer survey system to dial the caller after the agent disconnects.

Currently, the following survey vendors are supported:

- RecordIt

Activate: If selected, callers will be include in the survey process.

Prompt: Different kind of announcements to inform about the survey. Note: “None” will not play any announcement. “Info” will play an announcement about the survey. “Prompt” will play the announcement, and the user can express his will of taking part of the survey by pressing 1.

3.3.2.6 Skill Based routing

Use Skillbased routing: If enabled the skills based routing will be used when distributing calls.

Importance: Defines how important the given skill is for this queue. The importance factor is multiplied by the agent’s skill level. Example(s): A queue has skill-Importance=3 and an agent have that skill with level=2. The agent gets a score of 6 and would get the call if no other has a higher score for this call.

3.3.3 Voice Queue Users

QUEUES
CLIENTS
AUDIO
USERS
FORWARDING
NETWORK
SYSTEM
INSTALL

VOICE QUEUES
Main
BASIC | ADVANCED | **USERS** | OPENING HOURS

Queue:

Main

Queue Users

Available

Person

- Michel Test 1
- Test1 User

Group

- Administrators
- ADTestGroup
- Forwarding
- Level1_group1
- Level2_group1
- Level2_group2
- Level3_group1
- mssqlCloudSMRead
- orgtestgroup
- ssssssssssss
- WebVPN-Sales
- ZyExchange Test
- zyincludegroup
- Zylinc Exchange Sync Group
- Zylinc Lync Federated Users
- Zylinc Lync Test Users
- Zylinc Lync Users
- Zylinc Scale XMPP Users
- zylinc_ocs_users
- Zylincs Legacy Lync Users (i.e. users on Lync
- ZylincSyncGroups
- ZySVNAccess
- ZySync
- ZyTest's grüppen
- Zytæst Gröåp
- Zytæst SübGröåp

Primary ?

Person

- Helen Patterson
- Jytte Laursen
- ZyDesk Administrator

Secondary ?

Person

- Jean-Paul Test8 Français User
- Peter Hansen

Standby ?

Owners ?

-- visible for all --

Result ?

- Helen Patterson
- Jytte Laursen
- ZyDesk Administrator

Result ?

- Jean-Paul Test8 Français User
- Peter Hansen

Result ?

Result ?

- Azita Test 1
- Helen Patterson
- Helle Test 1
- Jean-Paul Test8 Français User
- jip sync test jipsyn.
- Josley Test 11

The voice queue users subpage are used to add or remove users or groups as either primary, secondary, standby or owner on the queue.

The list to the left called “Available” will show all available agents, and all available groups. Note that individual users will disappear from this list, when they are added to either primary, secondary or standby. Therefore, you will have to remove them from a list, to be able to add them to another. (This is indicated with the left/right arrow icons, used to add or remove the user or group). The list called owners, will not remove the user or group from the list. (This is indicated with the +/- icons used to add or remove the user or group).

In the middle of the screen, you see “Primary”, “Secondary”, “Standby” and “Owners”.

Primary: New calls are always first routed to primary users in automatic mode if they are available.

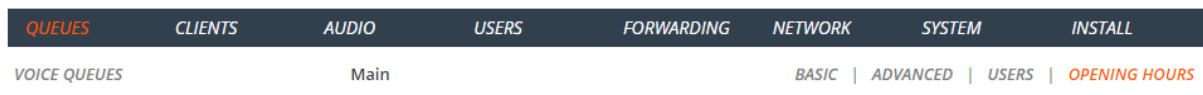
Secondary: New calls are only routed to secondary users in automatic mode if no primary users are available.

Standby: Users in standby mode does not see or receive calls from this queue until the limit is reached.

Owners: Users that are owners of this queue, can change settings and view statistics even if they are not explicitly defined above as primary, secondary or standby users. Note: If empty, everyone with access is permitted to view this queue, independent of the above settings.

On the right side of the screen, you can see 4 “result” lists. These lists expands groups into group members. Each “result” list corresponds to the primary, secondary, standby or owner immediately to its left.

3.3.4 Voice Queue Opening Hours



The opening hours for a queue are determined by three factors:

1. The queue's opening hours
2. Calendar based exceptions
3. Queue specific exceptions.

To determine the queue's opening hours on a given date, the existence of any queue specific exceptions to opening hours is checked first. In their absence, it is left up to the linked calendars to determine the queue's opening time. If no calendars contain exceptions for the day, the queue's standard opening hours are used.

3.3.4.1 Timezone



Timezone: Timezone for this queue.

3.3.4.2 Opening Hours

Opening Hours:

Monday	<input checked="" type="checkbox"/>	08:00 - 16:00
Tuesday	<input checked="" type="checkbox"/>	08:00 - 16:00
Wednesday	<input checked="" type="checkbox"/>	08:00 - 16:00
Thursday	<input checked="" type="checkbox"/>	08:00 - 16:00
Friday	<input checked="" type="checkbox"/>	08:00 - 16:00
Saturday	<input type="checkbox"/>	08:00 - 16:00
Sunday	<input type="checkbox"/>	08:00 - 16:00

Default opening hours for the queue can be specified here.

3.3.4.3 Exceptions from Schema

Exceptions from Schema: Added to queue

<ul style="list-style-type: none"> trertre retr WeekendClosed XMAS yearlyrecurtest zam3 zam3_reimport ZylincHelligdage 	<input type="button" value="➔"/> <input type="button" value="➠"/>	<ul style="list-style-type: none"> danishholidays WeekendPropt 	<input type="button" value="⬆"/> <input type="button" value="⬇"/>
---	--	--	--

Exceptions on queue: Queue specific exceptions to the default opening hours, prioritized in the order they appear in the list.

The exceptions can be administered via Admin Portal / Queues / Calendar.

3.3.4.4 Exceptions on queue

Exceptions on queue: Added to queue

<p>Open: <input type="checkbox"/></p> <p>Date: <input checked="" type="radio"/> 16/02/2017 <input type="checkbox"/> Repeat Yearly</p> <p>Day: <input type="radio"/> Monday</p> <p>Time: <input checked="" type="checkbox"/> All Day</p>	<input type="button" value="➔"/> <input type="button" value="➠"/>		<input type="button" value="⬆"/> <input type="button" value="⬇"/>
--	--	--	--

Exceptions are queue specific exceptions to the default opening hours, prioritized in the order they appear in the list.

Open: If checked, the exception will be extraordinary open. If not the exception will be extraordinary closed.

Either “date” or “day” can be selected:

- Date: The date of the exception. May repeat yearly if this option is checked.

- Day: The exception will be for a specific weekday, e.g. every Monday

Either all day or the start time + end time can be selected.

- All day: the entire day will be active
- Time: enter a start time and end time of the exception

3.3.4.5 Priority between “Queue Exceptions”, “Schema Exceptions and “Normal Opening Hours”

A date or time for queue opening or closure can be specified more than once.

When calculating if a queue is open or closed, the following prioritization is used:

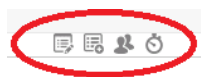
1. Priority is “Exceptions on Queue”. The “added to queue list” can be sorted using the up/down arrow. The top of the list has the highest priority.
2. Priority is “Exceptions on Schema”. The “added to queue list” can be sorted using the up/down arrow. The top of the list has the highest priority.
3. Priority is “Opening Hours”.

The system reads the lists in the order described above. As soon as the system finds an “open” or “close” command this command will be used, and no further “open” or “close” commands will be read until the just found command expires.

3.3.5 Voice Queue bulk administration

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES							
Display Name:	Name:	Number:	Weight:	Users:	Lang:		
Main number voice queue	Main	91361	1	5	en		
Sales voice queue	Sales	91362	1	0	en		
Support call cente voice queue	Support	91363	1	0	en		
<i>Bulk administration of queue settings</i>							
Add Voice Queue							

The bulk administration feature is available if more than 1 queue exists. It can be used to mass update a setting on several selected queues at once.



Use these 4 shortcut buttons to select which of the queue setting subpages (tab sheets) to bulk update.

You will then see the normal options for either basic, advanced, users and opening hours and in addition to the normal options, the top of the subpage will show a list of all queues, and list to select the queues to bulk update.

One or more queue can be selected for bulk update.

Note that when bulk updating queues with several different languages, all those languages must exist if audio files are to be changed. Otherwise, the bulk update will fail.

3.4 Mail Queues

Display Name:	Name:	Email Address:	Weight:	Users:
Support mail queue	SupportMailQueue	mail@address.domain	1	0

[Add Mail Queue](#)

Mail queues are similar to voice queues in many ways and concepts. Instead of being voice calls, the communication media is written and delivered via e-mail.

Compared to voice queues, mail queues does not have

- Opening hours and hence not failover open/closed settings
- Caller rated distribution
- Caller rated priority
- Queue limits
- Announcements

3.4.1 Basic Settings

Name, display name, color code, public queue: see voice queues

Address: The mail address to reach the queue. This is also the email address that will be used as sender if the from and reply-to fields are empty. Note: In contrast to the from address below, this mail address must be unique for the queue.

Display Name: The mail display name for the queue used when answering emails.

From Address: The mail address to use in the from header when answering mails received on this queue. If empty, the above settings will be used.

Reply-To Address: The mail address to use in the reply-to header when answering mails received on this queue.

Display Name: The display name to use in the reply-to header when answering mails received on this queue.

Reply-To Bcc: The mail address to use in the reply-to bcc header when answering mails received on this queue.

Display Name: The display name to use in the reply-to bcc header when answering mails received on this queue.

3.4.2 Connection Settings

Connection Settings:

Mail Account:	<input type="text"/>	<input type="text"/>	IMAP User:	<input type="text"/>	IMAP Password:	<input type="password"/>
SMTP User:	<input type="text"/>	SMTP Password:	<input type="password"/>			

Mail Account: The mail connection used for this queue.

IMAP User: The username to login to the mailbox. Note: A username might already be defined on the mail account. If this setting is left empty that will be used.

Password: The password to login to the mailbox.

SMTP User: The username used for sending emails. Note: A username might already be defined on the mail account. If this setting is left empty that will be used. If none are defined, SMTP authentication will not be used.

Password: The password used for sending emails.

3.4.3 Call Distribution

Call Distribution:

Distribution:	<input type="text"/>	Weight:	<input type="text"/>
Historical Routing:	On Address: <input type="text"/>	Limit:	<input type="text"/> minutes
Standby User - Calls:	Activate: <input type="text"/>	Deactivate:	<input type="text"/>
Standby User - Sec.:	Activate: <input type="text"/>	Deactivate:	<input type="text"/>

Distribution, weight, standby user: see voice queues



Historical Routing On Address: Can be default, enable or disable. If default is selected, the settings from Admin Portal / Clients / General Settings are used. If enable or disable is selected, this “general setting” can be overruled on a per-queue basis.

Limit x minutes: If enabled, mails received from the same mail-address will be distributed to the previous handling agent if this Agent is currently logged-in and active on the queue. The limit defines how long back the system should look for the user. A limit of 0 means that there are no limit. If no value defined the default value is used. Note: Waiting mails in the queue will be overtaken if distributed due to historical routing.

On Mail-Tag: If enabled the system will distribute replies to mails that has already been handled by an agent to the same agent base on a private/hidden tag in the mail header. Note: Waiting calls/mails in the queue will be overtaken if distributed due to historical routing.

3.4.4 Threshold Values



Threshold Values:

Service Goal: seconds  Warning Level: calls 

Service goal, warning level: see voice queues


3.4.5 Timers

Timers: Public Private (Moved)

Timeout:  

Timeout: see voice queues.

3.5 Chat Queues

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
CHAT QUEUES							
Display Name:	Name:	User Address:	Weight:	Users:	Lang:		
Support chat queue	SupportChat	admin	1	0	en		
Add Chat Queue							

Chat queues are almost identical to e-mail queues.

Compared to e-mail queues they do support more functions:

- Opening hours
- Fail over functions
- Queue limits on new calls
- Announcements based on chat texts queues

3.5.1 Basic Settings

Basic Settings:	
Name:	lynchatqueue02 ?
Queue Display Name:	SfB Chat Q02 ?
Queue Type:	SfB Chat ?
Public Queue:	<input checked="" type="checkbox"/> ?
User:	sip:lynchatqueue02@zylinc.com ?
Colour Code:	#FFBA30 ?

Name, queue display name, color code, public queue: see voice queues.

User: The user identifying the queue. Warning: Changing this value will drop all active chat sessions.

Queue Type: Defines the type of queue. Possible values are SfB Chat (for Skype for business chat queues) and XMPP Chat (for XMPP chat queues)

3.5.2 Call Distribution

Call Distribution:	
Distribution:	Longest idle ?
Historical Routing:	On Address: Disable ?
Standby User - Calls:	Activate: 0 Deactivate: 0 ?
Standby User - Sec.:	Activate: 40 Deactivate: 20 ?
Weight:	1 ?
Limit:	15 minutes ?

Distribution, weight, standby user: see voice queues.

Historical Routing On Address: Can be default, enable or disable. If default is selected, the settings from Admin Portal / Clients / General Settings are used. If enable or disable is selected, this “general setting” can be overruled on a per-queue basis.

Limit x minutes: If enabled chats received from the same Chat-address will be distributed to the previous handling agent if this agent is currently logged-in and active on the queue. The limit defines how long back the system should look for the user. A limit of 0 means that there are no limit. If no value defined the default value is used. Note: Waiting chats in the queue will be overtaken if distributed due to historical routing.

3.5.3 Threshold Values

Threshold Values:	
Queue Limit - New Calls:	0 calls or <input checked="" type="checkbox"/> No limit ?
Service Goal:	60 seconds ?
Warning Level:	0 calls ?

Queue limit - new calls, service goal, warning level: see voice queues

3.5.4 Timers

Timers:	Public	Private (Moved)
Timeout:	- default - ?	- default - ?

Public timeout, private (moved timeout): see voice queues.

3.5.5 Announcements

Announcements:

Language, Primary: ?

Welcome Text: ?

Connected Text: ?

Disconnected Text: ?

Language, Primary: Language used for this queue.

Welcome Text: Text to send to user when entering a chat queue. The following tags can be used: - \$caller\$: name of the caller/chatter (if available) Example(s): Hi \$caller\$. Please wait for an agent to become available

Connected Text: Text to send to user when connected to an agent. The following tags can be used: - \$agent\$: name of the connected agent Example(s): You are now being connected to \$agent\$

Disconnected Text: Text to send to user when the user is disconnected by the system.

3.5.6 Position Announcement

Position Announcement:

Enable Position Announcement: enable ?

Enable Position Announcement: see voice queues.

3.5.7 Failover - Queue Open

Failover - Queue Open: ?

Unmonitored Queue: ?

Queue Full Text: ?

Unmonitored Text: ?

Unmonitored queue: see voice queues.

Queue Full Text: Text to send to user when the queue is full. The following tags can be used: - \$queue\$: name of the queue. Example(s): The queue \$queue\$ is full right now. Please try again later.

Unmonitored Text: Text to send to user when the queue is unmonitored. The following tags can be used: - \$queue\$: name of the queue Example(s): The queue \$queue\$ is right now closed. Please try again later.

3.5.8 Failover - Queue Closed

Failover - Queue Closed: ?

Closed Text: ?

Closed Text: Text to send to user when the queue is closed. The following tags can be used: - \$queue\$: name of the queue Example: The queue \$queue\$ is right now closed. Please try again later.

3.6 Personal Voice Queues

The purpose of personal voice queues is to “catch” direct calls to an agent’s phone.

If an agent’s phone is called directly, the system will detect it and immediately forward it to the personal voice queue number.

By doing this, the call is now placed in a queue, and hence all the features for queues will now become available to direct calls.

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
PERSONAL VOICE QUEUES							
Display Name:	Number:	Lang:	Redirect:				
Jean-Paul Test8 Français User	95555	en	✓				
Helen Patterson	91555	en					
Jytte Laursen	91557	en					
Peter Hansen	91556	en	✓				

[Add Personal Voice Queue](#)

Compared to voice queues, personal queues differ in the following ways:

- A function to enable “Redirect direct calls from ZyDesk” is available for personal queues.
- Personal queues have only one user, and therefore no function exists to add users. No other agents can be primary/secondary/standby/owner and so on.
- No call distribution, since no other agents can be added
- No timers for moved or callback, since calls cannot be transferred to personal queues
- The failover concept is simpler. Failover open does not exist.

3.6.1 Basic Settings

Basic Settings:	
User:	Helen Patterson
Queue Name:	<input type="text" value="pq_zhp_zylinc.com"/> ?
Number:	<input type="text" value="91555"/> ?
Queue Display Name:	<input type="text" value="Helen Patterson"/> ?
Colour Code:	<input type="text"/> ?

Queue name, number, queue display name, color code: see voice queues

User: Cannot be changed, since each personal queue maps to exactly one agent

3.6.2 Timers

Timers:	
Public Timeout:	<input type="text" value="- default -"/> ?
WrapUp time:	<input type="text" value="2"/> seconds ?

Public timeout: see voice queues

WrapUp time: see voice queues advanced

3.6.3 Call Distribution

Call Distribution:

Redirect direct calls from ZyDesk: ?

Update Connected Line ID: ?

Update connected line id: see voice queues

Redirect direct calls from ZyDesk: If checked direct calls to this users phone will be redirected to their personal queue - if they are logged into the ZyDesk client.

3.6.4 Threshold Values

Threshold Values:

Queue Limit - New Calls: calls or No limit ?

Queue Limit - Waiting Calls: seconds or No limit ?

Service Goal: seconds ? Warning Level: calls ?

Queue limit new calls, queue limit waiting calls, service goal and warning level: see voice queues.

3.6.5 Announcements

Announcements:

Language, Primary: ? Autodetect: ?

Music on hold: ? Answered: ?

Welcome announcement: ?

Adhoc announcement, Welcome: ?

Adhoc announcement, Queue: ?

Custom announcement, New Calls: ? Frequency: ?

Custom announcement, Returned Calls: ? Frequency: ?

Private announcement: ? Frequency: ?

All announcement functions: see voice queues

3.6.6 Position Announcement

Position Announcement:

Enable Position Announcement: enable ?

Pre-Position announcement: ?

Position announcement #1: ? ?

Position announcement #n, Part 1: ? ? Part 2: ? ?

All announcement functions: see voice queues

3.6.7 Failover

Failover: ?

Failover queue:	- None -	?	
Failover Announcement:	- None -	?	
Failover Forwarding:		?	SIP Trunk: - Local Extension -
Failover IVR:	- None -	?	

Note that failover open does not exist.

For the failover functions: see voice queues (fail over closed)

3.7 Callbacks

The callbacks function is used to remove callbacks from the queues.

It provides a view of

- Scheduled Callbacks
- Active Callbacks

Callbacks can be deleted from the system via this page.

Scheduled CallBacks (1)

Queue:	CallBack number:	Created at:	Scheduled for:	Note:
Main number voice queue	+4512345678	Feb 17 15:20	Feb 17 15:25	

Active CallBacks

No Active CallBacks

Scheduled callbacks are the ones that are currently waiting for the “Scheduled timer” to trig. (Typically if an agent has selected “postpone until date/time” when a callback was not picked up.)

Scheduled CallBacks

No Scheduled CallBacks

Active CallBacks (1)

Queue:	CallBack number:	Created at:	Scheduled for:	Note:
Main number voice queue	+4512345678	Feb 17 15:08	Feb 17 15:08	

When the timer trigs, the callback will become active, which means that it is no longer waiting, and will be routed to the first available agent.

3.8 Dial Lists

Dial lists provides a feature to import, create or delete planned outgoing calls into the system.

Dialout	Queue	Number	Display name	Date	Time	Note
Create	Main number voice queue	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
Delete	Main number voice queue	Type:	<input type="text" value="Scheduled Only"/> <ul style="list-style-type: none"> <input type="text" value="Scheduled Only"/> <input type="text" value="Active Only"/> <input type="text" value="All"/> 			
Scheduled Dialouts (1)						
Display Name:	Queue:	Number to dial:	Created at:	Scheduled for:	User:	Note:
Will Doe	Main number voice queue	+4545454545	Feb 17 15:29	Feb 17 15:29	admin	
Active Dialouts (2)						
Display Name:	Queue:	Number to dial:	Created at:	Scheduled for:	User:	Note:
John Doe	Helen Patterson	+4512233445	Feb 17 15:19	Feb 17 15:19	admin	
John Doe	Main number voice queue	+4512233445	Feb 17 15:19	Feb 17 15:19	admin	

Queue: Select the voice queue or personal queue to inject the call into.

Number: Phone number to dial.

Display name: This name will be shown the agent.

Date time: Date and time for when the call should occur.

Note: This note will be shown to the agent.

Create: This button creates a dial-out.

Delete: This button deletes either scheduled, active or all dialouts.

3.8.1 Import dial list from CSV file

Import	Queue	CSV File	Seperator	Headers
Upload	Main number voice queue	<input type="button" value="Vælg fil"/> Der er ikke valgt nogen fil	<input type="text" value=";"/>	<input type="checkbox"/>

Upload of new diallist. The format must be: [DisplayName];[Number];[Note];[DateTime] or [DisplayName],[Number],[Note],[DateTime] where the first 2 are mandatory and [DateTime] must be in the format - dd-MM-yyyy HH:mm Note: Uploaded file must be in ANSI/ISO-8859-1 format

3.9 IVR Menus

Two IVR menu types exist:

- Prompt & Collect IVR
- A-number Based IVR

3.9.1 Prompt & Collect IVR

Prompt & Collect IVR is typically used to prompt the user to enter a number on the phone keypad, and based on the digits entered, several actions can occur. (See IVR Actions below)

A web-based IVR configuration can be used to configure IVR scenarios such as "Press 1 for sales, 2 for support.....". IVR Menus are essentially always one-level IVR's with a number of IVR actions. If multiple levels are needed, one IVR action can point to another IVR menu. For date/time control, the IVR action can point to a queue.

For very advanced IVR configurations, Zylinc's script language can be used to make an unlimited number of IVR levels using time, A-number and other parameters as input. It is NOT recommended to use both the Web admin and the script based IVR in the same installations.

Menu Settings:			
Name:	<input type="text" value="MainIVR"/>	Number: <input type="text" value="910000"/>	Number: <input type="text" value="910000"/>
Queue Type:	<input type="text" value="Zylinc Media Server"/>		
Display Name:	<input type="text" value="Main IVR menu"/>		
Type:	<input type="text" value="Prompt & Collect IVR"/>	Language: <input type="text" value="- no change"/>	
Announcement:	<input type="text" value="WelcomeIVR"/>		
IVR Prompt:	<input type="text" value="MainIVR"/>	Max.: <input type="text" value="1"/>	Timeout: <input type="text" value="6"/> Attempts: <input type="text" value="1"/>

Name: The IVR menu name used to identify this IVR menu.

Number: The number to reach this IVR menu. If left empty this IVR can only be reached reach by forwarding from another IVR or by failover from a queue.

Queue Type: Defines the type of queue.

Display Name: The IVR menu display name.

Type: Defines the IVR type: - Prompt & Collect IVR: IVR that takes action based on digits collected from the caller. - A-number based IVR: IVR that takes action based on the A-number.

Language: Language used for this IVR. If not set, the language from the incoming queue or IVR is used.

Announcement: The announcement initially played when the IVR is called.

IVR Prompt: The IVR Prompt played for the caller. During and after this prompt the IVR accepts digits.

Digits Max.: When this maximum is reached, no more digits are collected. Digit collection are also stopped when # is entered

Digits Timeout: Maximum allowed timeout in seconds between two digits. When reached, the digit collection restarts if at least one attempt is still left

Digits Attempts: Maximum attempt before digit collection is discarded.

3.9.2 A-number Based IVR

When this type is selected, the IVR takes action based on the A-number, and not on typed digits from the phone keypad.

The system can handle a call in different ways depending on the callers A-number.

A-number routing is configured as an IVR Menu but with the type "A-number based IVR", and has as such the same features as explained in previous chapter available. In the same way as one IVR action can point to another IVR menu, multiple A-number routing actions can also point to others.

Menu Settings:			
Name:	<input type="text" value="MainIVR"/>	Number: <input type="text" value="910000"/>	Number: <input type="text" value="910000"/>
Queue Type:	<input type="text" value="Zylinc Media Server"/>		
Display Name:	<input type="text" value="Main IVR menu"/>		
Type:	<input type="text" value="A-number based IVR"/>	Language: <input type="text" value="- no change"/>	
Announcement:	<input type="text" value="WelcomeIVR"/>		
IVR Prompt:	<input type="text" value="MainIVR"/>	Max.: <input type="text" value="1"/>	Timeout: <input type="text" value="6"/> Attempts: <input type="text" value="1"/>

This type is similar to “Prompt & Collect IVR” except that the IVR prompt, max, timeout and attempts settings will be unavailable.

3.9.3 IVR Actions

IVR Actions:							
Default:	Digit Start:	Digit End:	Language:	Announcement:	Action:	Settings:	
<input type="checkbox"/>	1		- no change	- none -	Queue Call	Main number voice	Delete
<input type="checkbox"/>	2		- no change	- none -	Queue Call	Sales voice queue	Delete
<input type="checkbox"/>	3		- no change	- none -	Queue Call	Support call cente vc	Delete
<input checked="" type="checkbox"/>			- no change	- none -	Repeat this IVR		Delete

[Add Action](#)

Default: Only one row can be selected. The row selected as default will act as the “catch-all” action and react on all other digits than those specified on a specific action.

Digit start: The digit(s) that will execute this specific action (this row)

Digit end: Only used for A-number based IVR, to specify the end of an A-number based scope.

Language: Language used for this action. If “- no change” is selected, the language from the incoming queue or IVR is used.

Announcement: Optional announcement to play after this action is selected by the user.

Action: The action to take. The type of “Settings” will vary depending on action as specified below:

- Queue Call, settings will let you select the voice queue or personal queue to send the call to
- Forward Internal, settings will let you enter the number to forward to
- Forward External, settings will let you enter the number and the sip trunk to forward to
- Forward IVR, settings will let you select the IVR to forward to
- Hang-up, no settings
- Repeat this IVR, no settings

3.10 Wallboard Profiles

Wallboard profiles are used to create several different wallboards with different settings.

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
WALLBOARDS							
Display Name:	Description:	Queues:	Agents:	News:			
Wallboard profile 1	Wallboard profile 1	1	1				
Reception wallboard	Reception wallboard	0	0				

[Add Wallboard](#)

The 3 buttons are available to the right

Link to wallboard Settings Delete

Link to wallboard: A direct link that will open the wallboard in and display it. (If the setting “Admin Portal / System / Interface / Configuration / Wallboard URL” is correct)

Settings: A link that will take you to the settings page for the respective wallboard profile

Delete: Delete the wallboard profile

3.10.1 Wallboard

Wallboard:

Name: ? Display Name: ?

Description: ?

Link: <http://jptestwin2012c:8081/ZyDataService/wallboard/app.html#?profile=WallboardProfile1>

Wallboard: The Wallboard name used to identify this wallboard.

Display Name: A Display name that describes the use of this wallboard.

Description: Description of this wallboard.

Link: A direct link that will open the wallboard in and display it. (If the setting “Admin Portal / System / Interface / Configuration / Wallboard URL” is correct)

3.10.2 Components

Components

Queues:

Agents:

Overview Component ?

VoiceQueue01

➡
⬅

Overview Component ?

ZyDesk Administrator

➡
⬅

Queues Overview Component: Select the queues that should be available in this wallboard profile

Agents Overview Component: Select the Agents that should be available in this wallboard profile

3.10.3 Information

Information

News: ?

Layout ?

News Ticker

Clock

Agent Data: ?

Status

Reason Code

Online Today

Call Wait Time

Talk Time

Answered Calls

Show Offline Agents

Show Outbound Calls

Shown Info:

Queue Data: ?

Current Longest Waiting time

Service Goal

News: The news information to show on the wallboard. Note: If multiple news are entered, separate them by a new Line.

Queue data: Enable or disable the information showing:

- Current Longest Waiting time
- Service Goal

Agent Data: Enable or disable the information showing:







- Status
- Reason Code
- Online Today
- Call Wait Time
- Talk Time
- Answered Calls
- Show Offline Agents
- Show Outbound Calls

3.11 Calendars

A calendar contains a number of days with extended or reduced opening hours, and optionally, a special closure announcement audio file can be attached to the calendar. This audio file will then be played to the user instead of the normal closure announcement for the queue, when the calendar is active.

This can be useful for specifying special extra closure time with a special announcement e.g. during public holidays, or extra opening hours can be specified e.g. in the case of launch of a new product.

The same calendar can be linked to several different queues, instead of having to define the exceptions manually for each queue. It is also possible to re-use the calendar on a later occasion if necessary.

Name:	Entries:	Announcement:	
Danish holidays	1		  
Extra opening first day of month	1		  

[Add Calendar](#) [Import Calendar](#)

Predefined calendars can be used for exceptions on “opening hours”.

Exceptions can be “extra open” or “extra closed”. If the calendar exception is defined as “closed”, an audio “announcement on closure” can be defined as well.


3 options exist:


 Edit  Export  Delete


- Edit takes you to the calendar details
- Export is described below
- Delete will delete this calendar

3.11.1 Calendar details

Calendar details:

Name: 

Announcement on closure: 

Timezone: 

Name: The name to uniquely identify the calendar. An easy to understand name should be used; e.g., Easter 2018 or Bank holidays 2018.

Announcement on closure: The announcement played for calls during closing time. If no announcement is selected a general queue announcement can still be associated when using the calendar on a queue.


Timezone: Timezone for this calendar.

3.11.2 Entries added to Calendar

Entries **Added to Calendar**

Open:

Date: Repeat Yearly


Day: 

Time: -

Feb 20 2017 [C]

Open, date, day, time: see queue opening hours

3.11.3 Export calendar

When you click on the  down button, the calendar will be exported to “.ics” format.

3.11.4 Import calendar

Calendars can be imported into the system with this function.

Import:

Filename No file chosen ?

Range ?

Calendar Name ?

Overwrite ?

Filename: The calendar file to import. The following rules apply: Recurring weekly events will be imported as weekly events. Recurring non-weekly events will be ignored. Events are considered 'Closed' events unless the tag 'X-ZYLINC-OPEN:T' is present. Note: Uploaded file must be in UTF-8 format

Range: Only import entries within the selected range. As the System ignores the year this setting can be used to import only the necessary entries.

Calendar Name: The name of the calendar. Leave empty if the name should be taken from iCal name field.

Overwrite: If checked the uploaded calendar will overwrite an existing calendar with the same name.

3.12 Queue Alarms

Name:	Mail Alert:	SMS Alert:		
VoiceQueue01	false	false		

[Add Queue Alarm Configuration](#)

Queue alarms is a feature to notify agents via mail or SMS if a queue becomes unmonitored.

3.12.1 Settings

Settings:

Agents to alert: Primary: ? Secondary: ? Standby: ?

Trigger Timer (unmonitored): seconds ?

Alert Sanity Timer: seconds ?

Agents to alert: Primary: Alert primary users on the queue. Secondary: Alert secondary users on the queue. Standby: Alert standby users on the queue.

Trigger Timer (unmonitored): The time for which a queue can be unmonitored before the alert is triggered. Note: If set to zero, the alarm will be disabled.

Alert Sanity Timer: The minimum time after one alert has been sent before a new can be triggered. This timer can be used to prevent triggering an alarm if an agent logs into a queue and then immediately logs out, and an alarm has already just been sent. Note: This timer must be set higher than the trigger timer. A value of 0 will disable the timer.

3.12.2 Mail Alerts

Mail Alerts:

Enable Mail alert: ?

Subject: ?

Body: ?

Sender: ?

Receiver list: ?

Mail Alerts: Enable Mail alert: If checked a mail alert is sent.

Subject: The email subject.

Body: The email text to send.

Sender: The email sender.

Receiver list: A list of email addresses the alarm should be sent to, separated by ',' (comma). Note: If the primary, secondary or standby checkbox is also checked, this list is an addition to these agents.

SMS Alerts:

Enable SMS alert: ?

Text: ?

Sender: ?

Receiver list: ?

3.12.3 SMS Alerts

SMS Alerts: Enable SMS alert: If checked an SMS alert is sent.

Text: The SMS text to send.

Sender: The SMS sender.

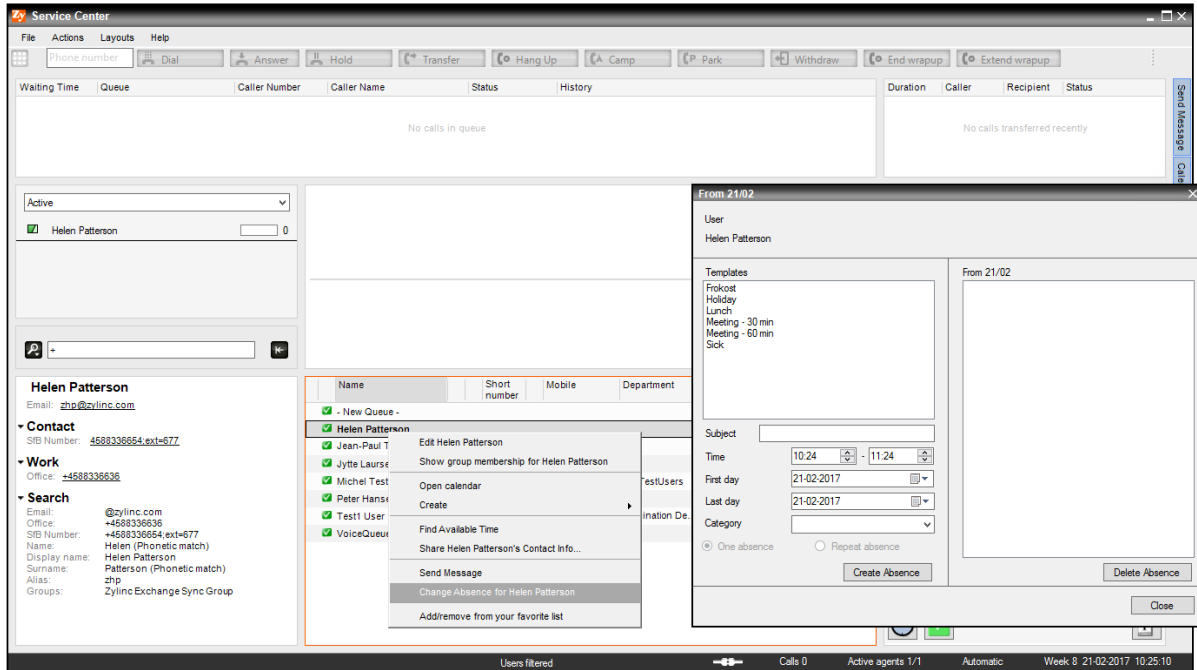
Receiver list: A list of phone numbers the alarm should be sent to, separated by ',' (comma). Note: If the primary, secondary or standby checkbox is also checked, this list is an addition to these agents.

4 Clients

The “Clients” part of the Admin Portal contains various settings related to the clients.

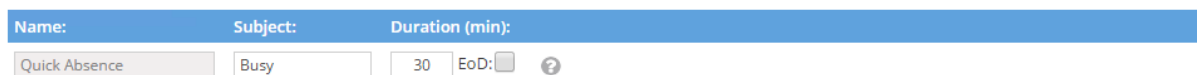
4.1 Absence Templates

ZyDesk has a feature to insert absence for a user (add an “absence” appointment to a user’s calendar with very few clicks)

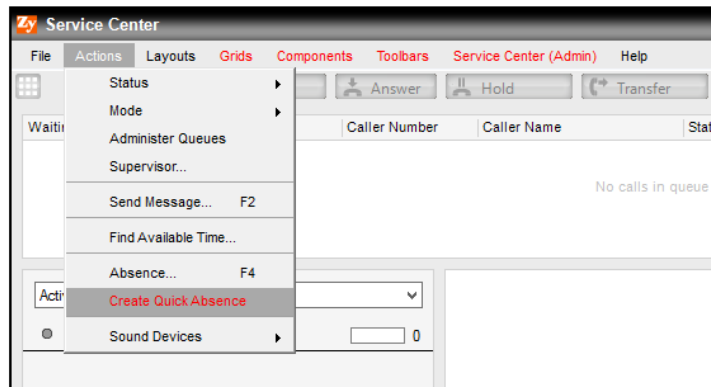


The absence templates are administered via the Absence Templates page in the Admin Portal.

4.1.1 Quick Absence



Quick Absence is a function that must be enabled in the ZyDesk profile via ZyDesk administrator.



Quick absence is a feature that can quickly insert predefined absence calendar entries into a user's calendar.

Name: A name that defines this quick absence

Subject: Calendar subject to insert

Duration: Duration of the appointment.

EoD: Duration is until the "End-of-Day"

4.1.2 List of all absence templates

Name:	Subject:	Category:	Start (hh:mm):	Duration (min):	Language:	
Ferie	Ferie	Holiday	<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	<input type="checkbox"/> EoD: <input checked="" type="checkbox"/>	Danish	Delete
Frokost	Frokost		12:00 Now: <input type="checkbox"/>	30 EoD: <input type="checkbox"/>	English	Delete
Holiday	Holiday	Holiday	<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	<input type="checkbox"/> EoD: <input checked="" type="checkbox"/>	English	Delete
Lunch	Lunch		12:00 Now: <input type="checkbox"/>	30 EoD: <input type="checkbox"/>	English	Delete
Meeting - 30 min	Meeting		<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	30 EoD: <input type="checkbox"/>	English	Delete
Meeting - 60 min	Meeting		<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	60 EoD: <input type="checkbox"/>	English	Delete
Møde - 30 min	Møde		<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	30 EoD: <input type="checkbox"/>	Danish	Delete
Møde - 60 min	Møde		<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	60 EoD: <input type="checkbox"/>	Danish	Delete
Sick	Sick	Sick	<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	<input type="checkbox"/> EoD: <input checked="" type="checkbox"/>	English	Delete
Syg	Syg	Sick	<input type="checkbox"/> Now: <input checked="" type="checkbox"/>	<input type="checkbox"/> EoD: <input checked="" type="checkbox"/>	Danish	Delete

[Add Template](#)

[Add Default Templates](#)

Save

Name: Name of this template

Subject: Subject of the calendar appointment to create

Category: Category of the calendar appointment to create

Start: Pre defined start time

Now: Let the inserted appointment start at the actual time right now

Duration: Predefined duration of the appointment.

EoD: Duration is until the "End-of-Day"

Language: The language of this template

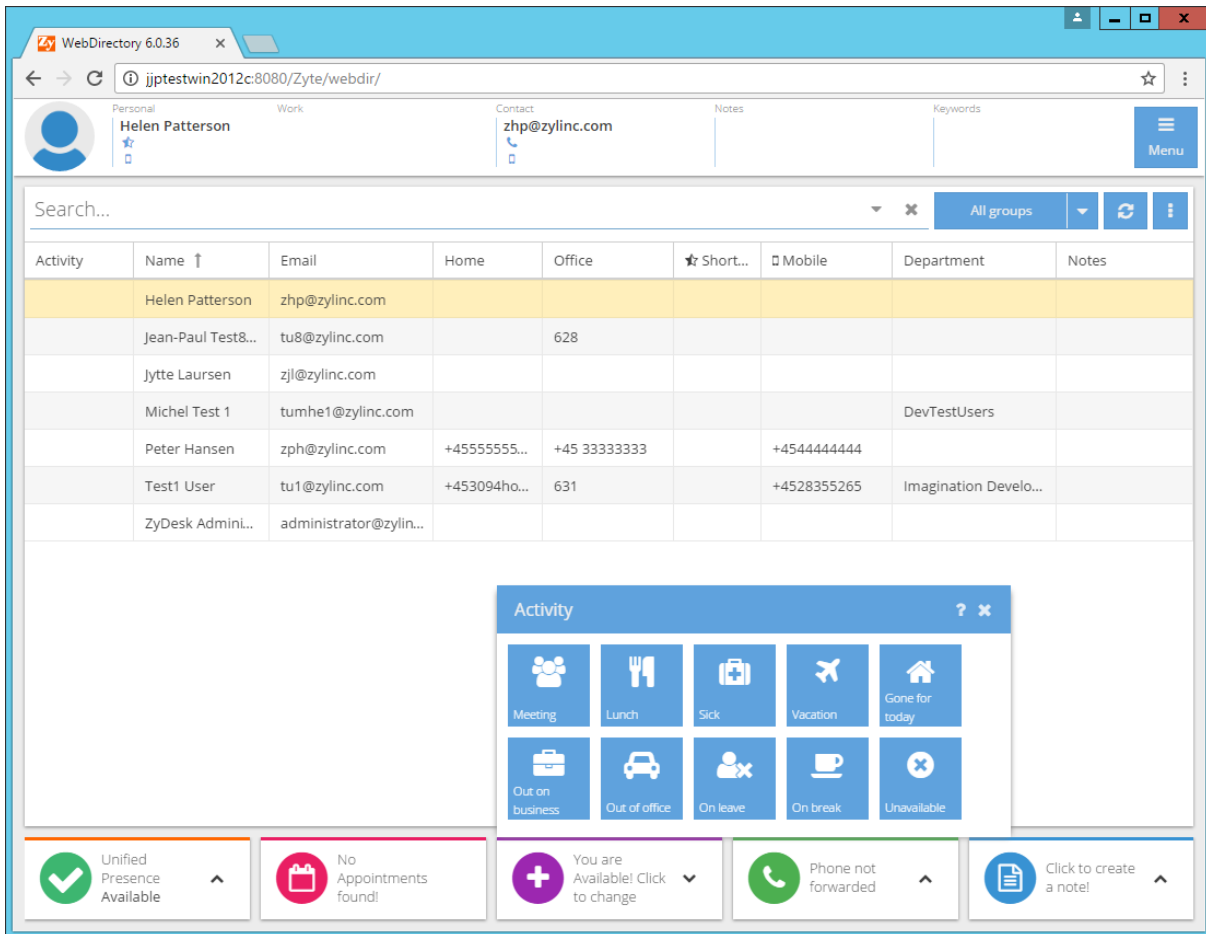
Delete: Delete this template

Add template: Adds a new template

Add default templates: adds the "factory default" absence templates

4.2 Activity Templates

Activities are used by the Web Directory product.



Activity (also called Nordic presence) allows users to set their current activity (lunch, holiday, travel etc.) in the Zylinc products, via a simple interface. A user’s activity can be viewed by others in the company and, if configured, an automatic forwarding of the user’s phone might take affect during the duration of the activity.

In release 6.0u2 only Zylinc’s new product Web Directory supports setting activities, while ZyDesk supports showing them.

Activities are defined via the Admin Portal and 10 activities are defined by default. More can be created if required, and any of the 10 default activities can be disabled (not deleted).

When configuring an activity, the following forwarding options can be applied:

- The user’s home number, mobile number, short number etc.
- Alternative user’s home number, mobile number, short number etc.
- A fixed number (e.g. the main number)
- Spoken absence

4.2.1 Activities vs. Absence

Activities can be enabled and used together with Zylinc absence, or it can be used as an alternative to it. The table below shows the current differences between Zylinc activity and Zylinc absence:

Feature	Absence	Activity
---------	---------	----------

Description	Calendar Appointment with a special category that can be set in Zylinc clients	Activity (lunch, sick...) set in Zylinc systems
Calendar sync	Yes. If user is synchronized to Exchange, Notes or Google	No
Start time	Date + Time mandatory	Always from Now
End time	Date + Time mandatory	Duration Optional
Templates	System defined absence templates. Possible to add/modify/remove	11*Zylinc standard Activities. Possible to modify name and hide some.
Forwarding	Calendar based forwarding can be configured to react on template category.	Optional on each Activity. Forwarded to number or spoken absence (dropdown)
Spoken absence	Supported via forwarding	Supported directly on Activity
Enable/disable	System level for all clients	System level for all clients
Zylinc release	Since 1.0	New in 6.0u2

4.2.2 General settings

General Settings									
Fallback Status:	Unknown								Save
Name:	Duration:	Forwarding:	Forwarding Result:	Type (icon):	BusyCode:	Enabled:	Available in all lang:	Languages:	
Meeting	30 minutes	None			Unknown	true	false	en	
Lunch	30 minutes	None			Unknown	true	false	en	
Sick	Unknown end	None			Unknown	true	false	en	
Vacation	7 days	None			Unknown	true	false	en	
Gone for today	End of the day	None			Unknown	true	false	en	
Out on business	2 hours	None			Unknown	true	false	en	
Out of office	60 minutes	None			Unknown	true	false	en	
On leave	24 hours	None			Unknown	true	false	en	
On break	15 minutes	None			Unknown	true	false	en	
Unavailable	30 minutes	None			Unknown	true	false	en	

[Add Template](#)

Fallback status: Choose the busy state to be shown when an activity is not active.

Name, duration, forwarding, forwarding result, type, busycode, enabled, available in all languages, languages: see below

Add template: adds a new template

4.2.3 Add or edit activity

Create from template:

Activity general settings:

Name: ?

Duration: ?

Forwarding: ?

Icon: ?

Busy-state: ?

Enabled: ?

All Languages Enabled: ?

Translations:

[Add Language](#)

Create from template: Select an existing activity to copy from when creating a new. Only available when creating a new activity.

Name: The name that identifies this activity.

Duration: The duration this activity is going to last for.

Forwarding: Select where to forward to, when the agent is busy in an activity. Possible values: User's numbers: Own home, Own office, Own pager, Own mobile, Own fax, Own short, Own lync. User's alternatives numbers: Alternative contact home, Alternative contact office, Alternative contact pager, Alternative contact mobile, Alternative contact fax, Alternative contact short, Alternative contact lync. It is also possible to enter a phone number, or to forward to a predefined "spoken absences"

Icon: Choose an icon for this activity.

Busy-state: Choose a busy state to be shown when this activity is selected.

Enabled: Set if this activity is going the enabled.

All Languages Enabled: This setting determines if an activity template is available in all languages. Note: Should users using a language that the activity template is not defined in, be able to see the template (in English), or should it be hidden to them?

4.2.4 Translations

Translations:

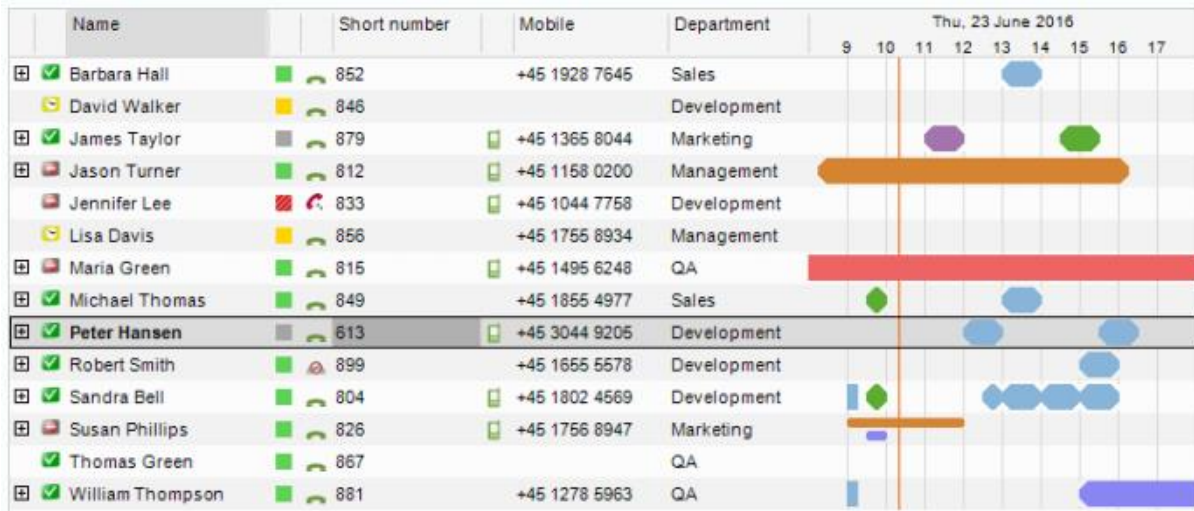
Select a Language

- Belarusian
- Bulgarian
- Czech
- Danish
- Dutch

The activity templates supports multiple languages, and each template can be translated into several languages.

4.3 Appointment Categories

Appointment categories defines the color of calendar appointment Gantt-bars in the ZyDesk Gantt.



In ZyDesk, the colors bars in the Gantt looks like this.

Default Text: Default Background: #000000 #B2C8BD ?

Description:	Type:	Identifier:	Text:	Background:	Language:	
Ferie	Category	Fri	#000000	#DDC84D	Danish	Delete
Ferie	Category	Ferie	#000000	#DDC84D	Danish	Delete
Ferie	Subject	Fri	#000000	#DDC84D	Danish	Delete
Ferie	Subject	Ferie	#000000	#DDC84D	Danish	Delete
Privat	Category	Privat	#000000	#A3CA73	Danish	Delete
Privat	Subject	Privat	#000000	#A3CA73	Danish	Delete
Private	Category	Private	#000000	#A3CA73	English	Delete
Private	Subject	[Marked Private]	#000000	#A3CA73	English	Delete
Sick	Subject	Sick	#000000	#B591AD	English	Delete
Sick	Category	Sick	#000000	#B591AD	English	Delete
Syg	Category	Syg	#000000	#B591AD	Danish	Delete
Syg	Subject	Syg	#000000	#B591AD	Danish	Delete
Vacation	Category	Day off	#000000	#DDC84D	English	Delete
Vacation	Subject	Vacation	#000000	#DDC84D	English	Delete
Vacation	Subject	Day off	#000000	#DDC84D	English	Delete
Vacation	Category	Vacation	#000000	#DDC84D	English	Delete
Vacation	Category	Holiday	#000000	#DDC84D	English	Delete
Vacation	Subject	Holiday	#000000	#DDC84D	English	Delete

Add New Add Defaults

Default text and background: Default text and background colors for appointment categories that does not match one of the criteria below.

Description: Name of the appointment category.

Type: Can be either “Category/Subject/Label ID” and corresponds to the similar field in the calendar system. Label ID is specific to Notes.

Identifier: The “title” of the category as ZyDesk seen by agents in ZyDesk

Text: The color value of the text

Background: The color value of the background

Language: Language of the category

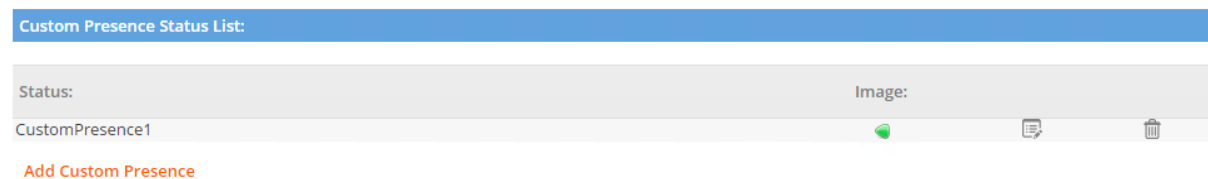
Delete: This button deletes the category

Add new: Add a new category to the list

Add defaults: Add the “factory default” categories

4.4 Custom Presence

Use this feature to add custom presence status texts and corresponding 12x12 icons to the system.



Status: Name of the custom presence

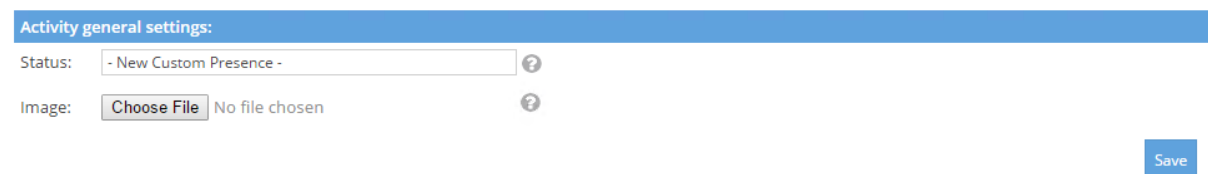
Image: Image/icon

Edit: Edit the text or image

Delete: Delete this presence

Add Custom presence: Adds a custom presence to the system

4.4.1 Add custom presence



Status: The status that identifies this Custom Presence.

Image: Choose File, Images should be png format, size 12x12 with alpha transparency.

4.5 Directory Management

Directory Management is used to administer which fields users are allowed to edit on themselves or others.

Rules for what is available when editing a user is controlled by settings on the Admin Portal on a page called Directory Management. This page allows administrators to define what a user can modify on themselves and what they can modify on the other users they have access to edit.

Fields a user may edit on himself:							
Personal Fields:	<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Surname	<input checked="" type="checkbox"/> Display name	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Alias	<input checked="" type="checkbox"/> Initials	
Address/Location:	<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Postal code	<input checked="" type="checkbox"/> Street address		
Organization:	<input checked="" type="checkbox"/> Company	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Office	<input checked="" type="checkbox"/> SMTP address			
Contact numbers:	<input checked="" type="checkbox"/> Office phone number	<input checked="" type="checkbox"/> Mobile phone number	<input checked="" type="checkbox"/> Home phone number	<input checked="" type="checkbox"/> Fax phone number	<input checked="" type="checkbox"/> Pager phone number	<input checked="" type="checkbox"/> Short phone number	<input checked="" type="checkbox"/> Skype for Business phone number
Misc.:	<input checked="" type="checkbox"/> Routing priority	<input checked="" type="checkbox"/> Note	<input checked="" type="checkbox"/> Keywords	<input checked="" type="checkbox"/> Alternative contact	<input checked="" type="checkbox"/> Queue name		

Fields a user with Directory Management rights may edit on others:							
Personal Fields:	<input checked="" type="checkbox"/> Name	<input checked="" type="checkbox"/> Surname	<input checked="" type="checkbox"/> Display name	<input checked="" type="checkbox"/> Title	<input checked="" type="checkbox"/> Alias	<input checked="" type="checkbox"/> Initials	
Address/Location:	<input checked="" type="checkbox"/> Country	<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> Postal code	<input checked="" type="checkbox"/> Street address		
Organization:	<input checked="" type="checkbox"/> Company	<input checked="" type="checkbox"/> Department	<input checked="" type="checkbox"/> Office	<input checked="" type="checkbox"/> SMTP address			
Contact numbers:	<input checked="" type="checkbox"/> Office phone number	<input checked="" type="checkbox"/> Mobile phone number	<input checked="" type="checkbox"/> Home phone number	<input checked="" type="checkbox"/> Fax phone number	<input checked="" type="checkbox"/> Pager phone number	<input checked="" type="checkbox"/> Short phone number	<input checked="" type="checkbox"/> Skype for Business phone number
Misc.:	<input checked="" type="checkbox"/> Routing priority	<input checked="" type="checkbox"/> Note	<input checked="" type="checkbox"/> Keywords	<input checked="" type="checkbox"/> Alternative contact	<input checked="" type="checkbox"/> Queue name		

In ZyDesk, it looks like this when a user is edited (if allowed):

The screenshot shows a web form titled "Edit Helen Patterson" with three tabs: "User Details", "Keywords", and "Alternative contact". The "User Details" tab is active. The form contains various input fields for user information, organized in two columns. The "Home" phone number field is highlighted in red. The "Department" dropdown menu is set to "Scale Testers". At the bottom right, there are "Save" and "Cancel" buttons.

4.6 General Settings

This Admin Portal page contains various general settings.

It is possible to override many of the general settings on a per-queue basis.

4.6.1 Agent Default Settings

Agent Default Settings:

Global Pickup Announcement: ? Play to Agent: ?

Chats per agent (Max): ?

Chat Displayname: ?

Mail Signature: ?

Default Offer Call: ?

Global Pickup Announcement: The global pickup announcement to play for callers after the agent has answered the phone. This setting can be overwritten on a per user level if needed. Note: If the selected announcement does not exist for a language on a queue, the English version is always played - if it exists.

Play to Agent: If checked the agent will also hear the pickup announcement.

Chats per agent (Max): The maximum number of chats an agent can handle before they are considered busy by the system.

Chat Display name: The chat display name used when handling external chat. Note: To use this in for example a web-chat, the web-plugin must be able to handle the setting of chat display names.

Mail Signature: The default email signature used when handling emails.

Default Offer Call: If checked, users will be offered the call in the client before the call is routed to their phone. If not checked, the call is routed to the phone immediately. This setting can be overwritten on a per user basis.

4.6.2 Agent Reason codes

Agent Reason codes

Inactive Reason Code list: ?

Standby Reason Code list: ?

Standby Reason Code Headset: ? Always: ?

Inactive Reason Code list: A comma separated list of reason codes to be presented for the agent when logging out. - If empty, no reason is stored in the statistics database. - If only one code is defined, this code is always stored

Standby Reason Code list: A comma separated list of reason codes to be presented for the agent when going into standby. - If empty, no reason is stored in the statistics database. - If only one code is defined, this code is always stored

Standby Reason Code Headset: The reason code used when the user is automatically placed into standby due to headset proximity or wearing sensor. Note: Please contact Zyline Support for details on which headset vendors and models that support this feature.

Always: If checked, the Headset Reason Code will be used for all sensor events including wearing sensor. Setting this means that the agent does not need to select between different reason codes when for example they take off their headset. If not selected, the normal reason code list will be used for those events where the agent can make a selection.

4.6.3 Agent Search settings (ZyDesk)

Agent Search settings (ZyDesk):

Autosearch: Forwarded Calls: Direct Queue Calls:

Autosearch: Forwarded Calls: Auto search settings for forwarded calls. Default configuration is forwarding number. Note: The value same company as forwarding number is typically used in scenarios where receptionist is handling calls from several companies and the company main-number is forwarded to the reception queue.

Direct Queue Calls: Auto search settings for calls directly to a queue, i.e. not forwarded calls. Typical configuration is "disabled". Note: The value search on same company as B-number is typically used in scenarios where a receptionist is handling calls from several companies and the company main-number is registered at the reception.

4.6.4 Queue Default Settings

Queue Default Settings:

Directory ID:

Queue Weight Max Time: Mail: seconds Social media: seconds Callbacks: seconds

Historical Routing: Mail-Tag: Number/Address: Limit: minutes

Directory ID: The default directory id used for the ZyCore ID WebService. Note: This value can be overridden on a per queue basis.

Queue Weight Max Time: Mail x seconds: The maximum time in seconds used for calculating the order of mails in a queue. This setting can be used to avoid that emails that have been waiting for days in a queue could prevent voice calls from being handled within a reasonable time. If 0 or empty no limit is used in the calculation.

Social media: The maximum time in seconds used for calculating the order of social media calls in a queue. This setting can be used to avoid that social media queries that have been waiting for days in a queue could prevent voice calls from being handled within a reasonable time. If 0 or empty no limit is used in the calculation.

Callbacks: The maximum time in seconds used for calculating the order of callbacks in a queue. This setting can be used to avoid that callbacks that have been waiting for days in a queue could prevent voice calls from being handled within a reasonable time. If 0 or empty no limit is used in the calculation.

Historical Routing: Mail-Tag: If enabled the system will distribute replies to mails that has already been handled by an agent to the same agent, based on a private/hidden tag in the mail header. Note: Waiting calls/mails in the queue will be overtaken if distributed due to historical routing.

Number/Address: Limit: If enabled, calls/mails received from the same A-number/Mail-address, will be distributed to the previous handling agent if this agent is currently logged-in and active on the queue. The limit defines how long back the system should look for the user. A limit of 0 means that there are no limit. Note: Waiting calls/mails in the queue will be overtaken if distributed due to historical routing.

4.6.5 Outgoing Calls

Outgoing Calls: Music-On-Hold: Language:

Audio Settings:

Allow dial using Queue Number:

Audio Settings: The Music-On-Hold to play for an outgoing call - for example when the call is placed on hold.

Language: Language to use for outgoing calls. This is for example relevant when an outgoing call is placed into the personal queue of an agent and an announcement needs to be played.

Allow dial using Queue Number: If enabled attendant console and service center clients allows agents to select which queue number to dial out as.

4.6.6 Survey

Default Settings: Activate: If checked, callers will be included in the survey process. Note: This is the default value, and can be overwritten per queue.

Prompt: Different kind of announcements to inform about the survey. Note: If “none” is selected, no announcement will be played. If “info” is selected, an announcement about the survey will be played. If “prompt” is selected, an announcement will be played, and the user can express his will of taking part of the survey by pressing ‘1’

Survey URL: URL to contact the survey application. Typical Value: <http://synaptum.virtuatel.org/index.php?r=vse/makecall>

Survey Key: Key to validate the survey.

Survey Info File: The survey info announcement to play for callers and inform them about the survey.

Survey Prompt File: The survey prompt announcement to play for callers and prompt them if they want to be part of the survey. Note: To confirm his participation on the survey caller should press number 1.

4.6.7 Client Broadcast

This feature allows an administrator (or a user with the right privileges) to broadcast a message to all running clients that use one of the following agent types:

- ZyDesk client
- ZyMobile App client

The broadcast will show a simple message on the device running these clients. This feature may be useful e.g. for system administrators to inform their users about a new update or an abnormal situation.

A privilege is available to limit the access to this feature.

Broadcast Message: The message to broadcast.

4.7 Global Timers

4.7.1 Private Queue – Moved calls, returned calls, hold/park and callbacks

Private Queue:	Moved Calls	Returned Calls	Hold/Park	Callbacks
Timeout:	1 Minute	20 sec	30 sec	3 Minutes

Moved Calls: Timeout: The interval for how long calls that has been placed in the private queue by another user are kept, before they are publically available.

Returned Calls: Timeout: The interval for how long returned calls are kept in the private queue, before they are publically available.

Hold/Park: Timeout: The interval for how long parked and held calls are kept queued, after the owning user has logged off or disconnected.

Callbacks: Timeout: The interval for how long callbacks are kept in the private queue before they are publically available. Note: Callbacks can only be in a private queue if transferred from another agent before dial-out.

4.7.2 Public Queue Monitored Calls

Public Queue:	Monitored Calls
Timeout:	30 sec

Public Queue: Monitored Calls Timeout: The interval for how long calls are kept in a queue after the last user has logged off the specific queue.

4.7.3 Agent WrapUp Chat Queues

Agent WrapUp:	Chat Queues
Timeout:	10 sec

Agent WrapUp: Chat Queues Timeout: The value for how long time users should have between a chat is ended and the next is distributed by the system in automatic mode.

4.7.4 Agent Offer Call-Offer and Call-Back Offer

Agent Offer:	Call-Offer	Call-Back Offer
Timeout:	30 sec	30 sec

Agent Offer: Call-Offer Timeout: The interval for how long a call is offered to an agent before the system considers the agent “not available”, and then automatically sets the agent’s status to this. Note: This setting is only relevant for users where call offering is enabled.

Call-Back Offer Timeout: The interval for how long a callback call is offered to an agent before the system considers the agent “not available”, and then automatically sets the Agent status to this.

4.7.5 Routing Answer, Dial-out and Blind Transfer agent timeout

Routing:	Answer	Dialout	Blind Transfer
Agent timeout:	20 sec	21 sec	21 sec

Agent timeout: Answer: The interval for how long a call is routed to an agent before the system considers the agent not available, and then automatically sets the agent's status to this. Note: This setting is only relevant for users where call-offering is not enabled.

Agent timeout: Dialout: The interval for how long a call is routed to a destination before the call is considered not answered in dial-out scenarios. Note: this time should be lower than the network timeout for it to have any affect.




Agent timeout: Blind Transfer: The interval for how long a call is routed to a destination before the call is considered not answered in a blind transfer scenario. Note: this time should be lower than the network timeout for it to have any affect.

4.8 Timer Profiles

Timer profiles make the reuse of timer settings easy across ZyDesk, web or mobile client profiles.

A "factory default" profile always exist with the name "Zylinec default"

Timer Profiles

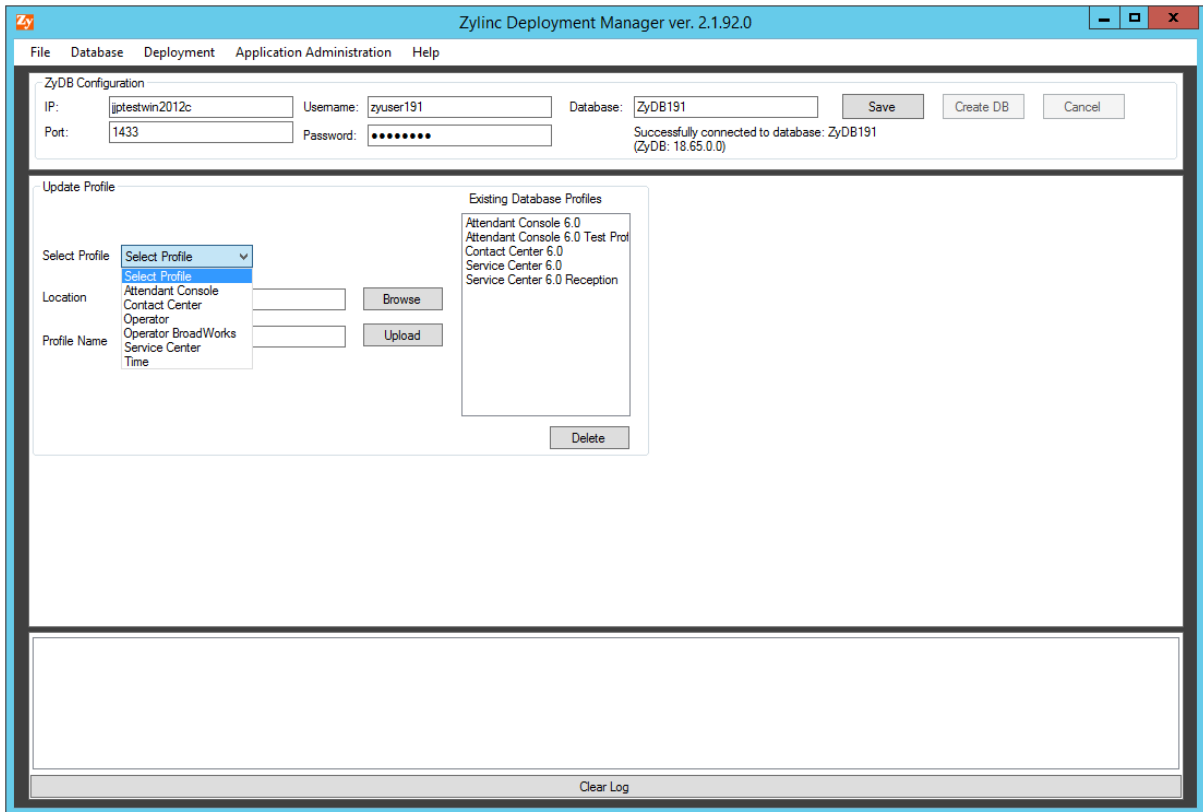
Name:	Unavailable timeout:	Manual mode timeout:	Camp-On-Busy timeout:	Outbound wrapup:	All Agents inactive:
Zylinec default	30 / Disconnect	0	0 / allow abort	2 seconds	Failover action 
Reception Timer Profile	0 / Reactivate	0	0 / no abort	1 seconds	Failover action 
Service Center Timer Profile	0 / Reactivate	0	0 / no abort	1 seconds	Failover action 

[Add Timer Profile](#)

In this case, the Zylinec default timer profile are visible, as well as 2 custom profiles named "Reception Timer Profile" and "Service Center Timer Profile"

4.8.1 Client Profiles – ZyDesk

Multiple ZyDesk Profiles can be uploaded via Deployment Manager



Each of them will be visible in Client Profiles – ZyDesk...

Client Profiles - ZyDesk

Profile Name:	Type:	Timer Profile:
Contact Center 6.0	ContactCenter	Zylinc defau ▼
Service Center 6.0	ServiceCenter	Service Cent ▼
Service Center 6.0 Reception	ServiceCenter	Reception Ti ▼
Attendant Console 6.0	Switch	Zylinc defau ▼
Attendant Console 6.0 Test Profile	Switch	Zylinc defau ▼

...and each can be mapped to the “Zylinc default” timer profile, or to an optional custom timer profile.

4.8.2 Client Profiles – Other

Client Profiles - Other

Profile Name:	Type:	Timer Profile:
ZyDesk Default	-	Zylinc defau ▼
Web Clients	-	Zylinc defau ▼
Mobile Clients	-	Zylinc defau ▼

ZyDesk Default: This setting indicates which of the timer profiles to use, if a new ZyDesk profile are uploaded from the Deployment Manager.

Web Clients: Which timer profile to use for the web operator client

Mobile: Which timer profile to use for the mobile app clients

4.8.3 Timer profile settings

Settings:	
Name:	Zylinec default ?
Unavailable Timeout:	30 sec ? Action on timeout: Disconnect ▾
Manual Mode Idle Timeout:	Never ?
Camp-On-Busy Timeout:	Never ? Allow Camp Abort: <input checked="" type="checkbox"/> ?
Outbound calls WrapUp time:	2 seconds ?
Queue Calls if all Inactive:	<input type="checkbox"/> ?
Queue Unmonitored Warnings to Agents:	<input checked="" type="checkbox"/> ?

Name: The name that identifies this profile.

Unavailable Timeout: The interval for how long an agent can be in unavailable mode, before an action is taken.

Action on timeout: Reactivate or Disconnect. The action that happens when an agent becomes unavailable

Manual Mode Idle Timeout: The interval for how long an agent in manual mode should be allowed to ignore calls in the queue. On timeout, the agent is forced into unavailable. When the queue is emptied or the given agent answers a call, the timer is stopped.

Camp-On-Busy Timeout: The interval for how long the systems waits for a user to become available when the function camp-on-busy is used.

Allow Camp Abort: If checked, a caller who has been camped are offered the choice of aborting a camp-on-busy.

Outbound calls WrapUp time: The value for how long time users should have between a call is ended, and the next is distributed by the system in automatic mode.

Queue Calls if all Inactive: If checked new calls will be queued if all users are inactive - otherwise calls will follow the failover open logic.

Queue Unmonitored Warnings to Agents: If checked, agents will get a warning, when they try to logout from a queue, where they are the only observer.

5 Audio

3 different types of audio announcements exist




- System announcements
- Custom announcements
- Adhoc announcements

System announcements are pre-recorded “factory default” audio messages.

Custom announcements can be recorded via a PC (or a professional bureau) and then uploaded to the system and used as required. They can also be recorded via the “announcement recording” feature.

Adhoc announcements are a special subset of custom announcements. Access permissions to change audio announcements can be limited in such a way that only adhoc announcements can be changed via the Admin Portal. This way a special “limited” Admin Portal user can be permitted to change only adhoc announcements, without being able to change other announcements in the system.

5.1 Ad Hoc Announcements

Announcement Name:	Category:	Languages:	Upload Date:	
adhoc-welcome		English	Feb 22 2017 14:00	  

A list of all the available adhoc announcements.

Announcement Name: The name of the adhoc announcement

Category: Optional category to group similar announcements when uploading

Uploaded announcements can be given an existing category or a new can be created. The Category only has impact on how the Audio files are sorted.

Languages: A list of which languages exist for this announcement

Upload Date: Displays the date the announcement was uploaded

Info: When hovering the mouse over this icon, the upload date, uploaded by, volume factor and comments becomes visible.

Play: Click this button to play the audio file

Delete: Delete the adhoc announcement.

5.2 Annc. Recordings

The announcement recording feature makes it possible to change announcements on a queue by calling into an IVR menu and record the desired prompt. It can also be used as an alternative to upload announcement for general use via the Admin Portal.

To use announcement recordings, at least one announcement placeholder must be defined. An announcement placeholder is defined with a display name used to identify it on the Admin Portal, and an announcement code (series of digits) used to identify it when calling in to change and record the announcement.

5.2.1 Configurations

Configurations:

New:

Display Name:

Recording ID:

Defined:

My add-hoc recording no2:222

Sales recording:101

Test recording:100

Copy to Custom Announcements:

Rec ID:

Name:

Category:

Language:

Ad Hoc:

Overwrite:

Dial-in Number da: 91400

Save

Copy

New: Display Name: The name to add for a new recording placeholder

New: Recording ID: IVR code for adding a new recording placeholder

Defined: List of all recording placeholders

5.2.2 Copy to Custom Announcements

A recording can be selected in the “defined” list and copied into a normal “custom announcement” via this feature.

Rec ID: Automatically filled out with the id of the selected recording

Name: The announcement name as it will be shown in custom announcements. This field is automatically filled out with the name of the recording. The name can be edited before copying.

Category: Select the announcement category. If '- NEW -' has been chosen above, the name of the new category must be entered into this text field. Uploaded announcements can be given an existing category or a new one can be created. The Category only has impact on how the Audio files are sorted.

















Language: The language of the uploaded announcement.

Ad Hoc: If checked the announcement will be available as an ad hoc announcement.

Overwrite: If checked the uploaded file will overwrite an existing file with the same name.

Dial-in Number <language>: This label shows the number that should be dialed to use the announcement recording function.

5.2.3 List of announcement recording placeholders


Name:	Recording ID:	Status:	Last Change:	
You are now logged out from all your queues	203	Recorded	Dec 19 2016 17:27	 
Badabing	1	Recorded	Apr 29 2016 13:34	 
MuchelsTest	3424	Empty	Jan 13 2016 12:16	
MheTest	4234423	Empty	Feb 8 2016 14:14	
You are now tast 1 for at logge ind, eller 2 for at logge ud	204	Recorded	Dec 19 2016 17:27	 
anmtes2	6894	Empty	Dec 5 2016 16:47	
Du er nu indmeldt i alle dine køer	206	Recorded	Dec 19 2016 17:27	 
anmtest	6890	Recorded	Nov 1 2016 12:34	 
You do not have access to this service	201	Recorded	Dec 19 2016 17:27	 
You are now logged in to all your queues	202	Recorded	Dec 19 2016 17:27	 
SurveyFailBye	103	Recorded	Apr 12 2016 17:24	 
SurveyWelcome	101	Recorded	Apr 12 2016 17:24	 
Du er nu udmeldt af alle dine køer	207	Recorded	Dec 19 2016 17:27	 
SurveyPrompt	105	Recorded	Apr 18 2016 14:10	 
Du har ikke adgang til denne service	205	Recorded	Dec 19 2016 17:27	 
MheTestMay	423423	Empty	May 4 2016 11:00	
SurveyThankYou	102	Recorded	Apr 12 2016 17:24	 
Press 1 to login, or 2 to logout	200	Recorded	Dec 19 2016 17:23	 
SurveyFailRetry	104	Recorded	Apr 12 2016 17:24	 

Name: Name of the announcement recording placeholder

Recording ID: Id number to identify this recording via IVR digits.

Status: Status shows if this placeholder is "recorded" or "empty"

Last Change: Date this record was last changed

 Play: Play this recording

 Delete: Delete this recording

5.3 Custom Announcements

This Admin Portal page contains a list of all custom announcements.


Announcement Name:	Category:	Languages:	Upload Date:	
closed-during-xmas		English	Feb 23 2017 09:46	  
closed-night		English	Feb 23 2017 09:46	  
main-IVR		English	Feb 23 2017 09:45	  
welcome-main-announcement		English	Feb 23 2017 09:47	  
Welcome-to-product-support		English	Feb 23 2017 09:44	  

Announcement Name: The name of the custom announcement


Category: Optional category to group similar announcements when uploading

Languages: A list of which languages exist for this announcement

Upload Date: Displays the date the audio file was uploaded

 Info: When hovering the mouse over this icon, the upload date, uploaded by, volume factor and comments becomes visible.

 Play: Click this button to play the audio file

 Delete: Delete the custom announcement.

5.4 Music On Hold

This Admin Portal page contains a list of all available music on hold.

Group:	Music-On-Hold:	Upload Date:			
anm1	Benny_Hill_Theme	Apr 13 2016 17:34			
BennyHill	Benny_Hill_Theme	Jan 20 2015 15:54			
Bobby	01_Bobby_McFerrin_-_Dance_With_Me	Apr 15 2016 09:30			
default	beethoven	Dec 3 2013 12:33			
default	chopin	Dec 3 2013 12:33			
Jonas_Waitt	11_My_Trust_In_You	Jul 5 2013 14:37			
Manhattan	Manhattan	Jun 11 2013 12:45			
mayer	21_-_Belief	Apr 15 2016 09:30			
Monkeys	tt-monkeys	Apr 15 2016 09:30			
More singing	Look_At_My_Horse	Jan 20 2017 14:38			
NewsDa	News_2	Nov 18 2016 13:15			
NewsDa	News_5	Nov 18 2016 13:14			
silence	silence_10sec	Dec 3 2013 12:33			
singing	leekwhilesinging	Feb 19 2016 08:03			

Group: The group that this music-on-hold is a member of

Music-On-Hold: Name of this music-on-hold

Upload Date: Date of upload

Info: When hovering the mouse over this icon, the upload date, uploaded by, volume factor and comments becomes visible.

Play: Play this audio file

Delete: Delete this audio file

5.5 System Announcements

System announcements is an un-editable list of all available system announcements


Announcement Name: ▼	Category:	Languages:	Upload Date:		
zylinc-zyqueue-youarenextsimple	Switch	English Danish			
zylinc-zyqueue-youarenext	Switch	English Danish			
zylinc-zyqueue-thereare	Switch	English Danish			
zylinc-zyqueue-thankyou		English Danish			
zylinc-zyqueue-pleasewait		English Danish			
zylinc-zyqueue-callswaiting	Switch	English Danish			
zylinc-vm-youhave	VoiceMail	English Danish			
zylinc-vm-welcome	VoiceMail	English Danish			


Announcement Name: The name of the system announcement

Category: The category that this announcement belongs to

Languages: A list of which languages exist for this announcement

Upload Date: Date of upload

 Info: When hovering the mouse over this icon, the upload date, uploaded by, volume factor and comments becomes visible.

 Play: Play this audio file

 Delete: Delete this audio file

5.6 Upload Audio Files

This page is used to upload audio files.

- Upload custom announcements
- Upload adhoc announcements
- Upload music on hold

5.6.1 Upload custom or adhoc announcement

Announcement:

Filename No file chosen ?

Volume Factor ?

Language ?

Name ?

?

Category ?

?

Comments:

Ad Hoc ?

Overwrite ?

Filename: The name of the announcement to upload. File must be either mp3 or wav.

Volume Factor: Can be used to increase/decrease the volume. - If higher than 1, the volume is increased (e.g. 2 will double the volume). - If less than 1, the volume is decreased (0.5 will halve the volume). When an audio file is uploaded, a volume factor can be given. Setting this to 1 (or leaving it empty) ensures that the volume-level is kept as it is, less than 0 and the volume will decrease (0.5 will half the volume) and higher than 1 the volume will be increased (2 will double the volume). This setting can be used if an uploaded file is played too high for the caller.

Language: The language of the uploaded announcement. When you upload an announcement, you must specify a language. The announcement can only be used in queues where the language matches the announcement's language.

Name: The name given to the uploaded announcement. Existing files are listed to allow the file to either overwrite an existing file or upload an existing announcement in another language.

Category: Select the announcement category.

Category name: The name of the new category, if '- NEW -' has been chosen above. Uploaded announcements can be given an existing category or a new can be created. The category only has impact on how the audio files are sorted.

Comments: Information about this announcement - for example what is being announced.

Ad Hoc: If checked the announcement will be available as an ad hoc announcement.

Overwrite: If checked, the uploaded file will overwrite an existing file with the same name.

5.6.2 Upload Music On Hold

Filename: The new Music-On-Hold file to upload. File must be either wav or mp3.

Volume Factor: Can be used to increase/decrease the volume. - If higher than 1, the volume is increased (e.g. 2 will double the volume). - If less than 1, the volume is decreased (0.5 will halve the volume). When an audio file is uploaded, a volume factor can be given. Setting this to 1 (or leaving it empty) ensures that the volume-level is kept as it is, less than 0 and the volume will decrease (0.5 will half the volume) and higher than 1 the volume will be increased (2 will double the volume). This setting can be used if an uploaded file is played too high for the caller.

Name: The name given to the uploaded music file.

Group: The group to upload the file to. A group can hold a number of music files. Choose '- NEW -' if the file should be uploaded to a new group.

Group Name: The Name of the new group, if '- NEW -' has been chosen above. Uploaded Music-On-Hold always belongs to a Group. A Group always consists of minimum one audio file but it is possible to add as many files as needed. When you select music on hold to a queue, you do not select one or more pieces of music directly. Instead, you select a group and all music belonging to this group will be used as music on hold in the queue. When you upload a piece of music, you should therefore select a group in which it is to be included.

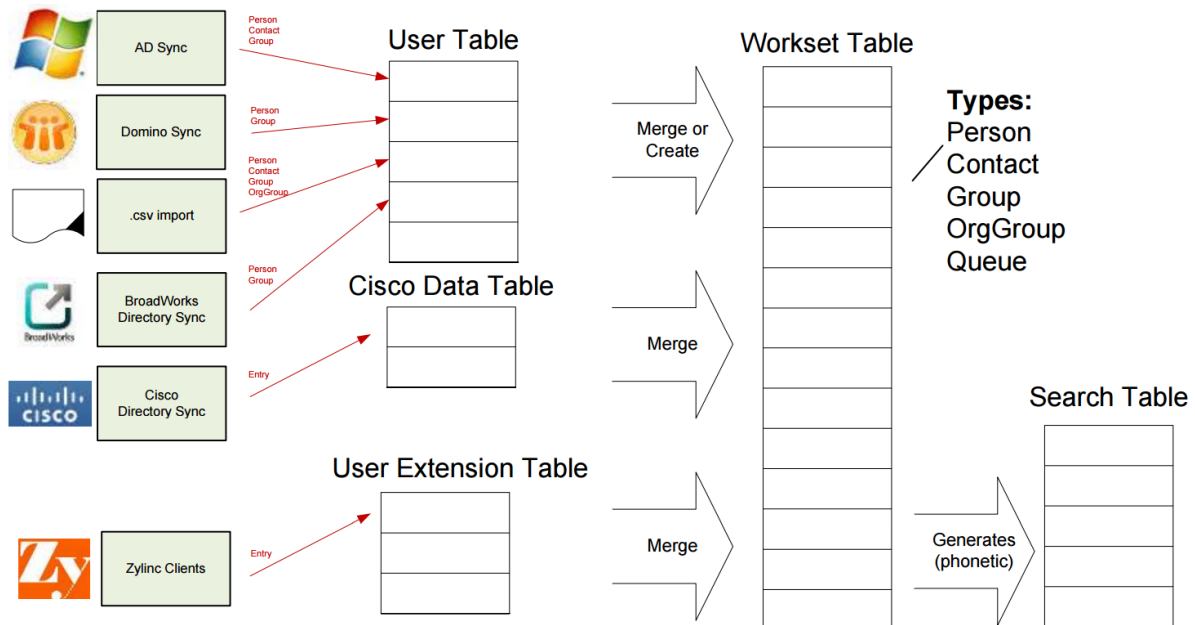
Comments: Information about this music-on-hold

Overwrite: If checked the uploaded file will overwrite an existing file with the same name.

6 Users

6.1 Sources that users may originate from

Users in the Zylinc solution may originate from the following sources:



- Active directory users or contacts. This includes Skype for business users.
- IBM Notes Directory users or contacts
- A .CSV file
- Imported from the BroadWorks PBX
- Imported from the Cisco PBX
- Manually entered via a Zylinc Client
- Imported from a CSV file via a Zylinc Client

6.2 User fields, properties and functions

When users are stored in the database, they have the following fields of information available:

Personal Fields	Name, surname, display name, title, alias, initials
Address/Location	Country, state, city, postal code, street address
Organization	Company, department, office, SMTP address (email)
Phone numbers	Office, mobile, home, fax, pager, shortnumber, Skype for Business number
Misc.	Routing priority, note, keyword, alternative contact, queue name
Extended	Description, info, thumbnail photo, jpeg photo, imported keywords, manager

Most of this information is available within the client software. E.g., most of the fields are searchable and displayable from the clients, and most of the fields that contain phone numbers support telephony functions such as transfer, call, camp-on-busy and so on.

6.2.1 User calendar synchronization

Users can be mapped to a calendar provider, and calendar appointments can be synchronized into the Zylinc system.

Calendar data can be used to:

- Display calendar data in the Zylinc clients
- Calendar based forwarding and spoken absence
- Zylinc clients may inject “absence” appointments into calendars

6.2.2 User PBX mapping

Users can be mapped to various PBX systems, and to various phones and phone types. This will provide the following features:

- Presence / line state / status text visible in Zylinc clients
- Call control (such as dial, answer, hold, hang-up)
- PBX functions such as transfer, camp, park, withdraw

6.2.3 User group memberships

Groups and organization groups are supported, and users can be members of them.

6.3 ZyDesk “Users” vs. “Agents”

2 different user types exists and are available via the Admin Portal

- ZyDesk users
- Agents

The 2 user types are similar except that ZyDesk users can be “promoted” into agents.

When a ZyDesk user are promoted into an agent, the following additional features becomes available:

- The user can be added to Queues (primary/secondary/standby) in the Admin Portal
- The user can receive calls from queues
- Access to Admin Portal becomes possible
- Access to Stat Portal becomes possible








6.3.1 Create a user for ZyDesk access


A user must be created for ZyDesk access before ZyDesk can be started. (See the chapter “ZyDesk Access Settings” below).

Users that are not created for ZyDesk access will be shown in strike through font. The user named “Test1 User”, marked with a red circle is an example of such a user.

Users that are created for ZyDesk access will be shown in normal font. The user named “Jytte Laursen”, marked with a yellow circle is an example for such a user.

After creating the user for ZyDesk access, the user must also be mapped to at least one ZyDesk Profile. (See the chapter “Users ZyDesk Profiles”). The user named “Helen Patterson”, marked with a green circle is an example of such a user.

Name:	Email:	Role:	
Helen Patterson	zhp@zylinc.com	User	
Jean-Paul Test8 Français-User	tu8@zylinc.com	User	
Jytte Laursen	zjl@zylinc.com	User	
Michel Test 1	tumhef@zylinc.com	User	
Paola Laursen	zph@zylinc.com	User	
Test1-User	tu1@zylinc.com	User	
ZyDesk Administrator	administrator@zylinc.com	Administrator	

Bulk administration of user settings 

6.3.2 List of ZyDesk profiles and ZyDesk agent support

Profile Name	Agent and queue support	Notes
Attendant Console	X	
Contact Center	X	
Service Center	X	
Operator	-	
Time	-	
Operator BroadWorks	-	Custom profile – not for general use

This table shows that the following profile types support agent functionality:

- Attendant Console, Contact Center, Service Center.

The following profile types does not support agent functionality

- Operator, Time, Operator BroadWorks

6.3.3 How to promote a ZyDesk user into an agent

To promote a ZyDesk user into an agent user, the following steps are required:

Create the user for ZyDesk access (See the chapter “ZyDesk Access Settings” below).

- Use Deployment Manager to upload at least one of the following ZyDesk profiles to system: (Attendant Console, Contact Center, Service Center)
- Map at least one of the following profiles to the user: (Attendant Console, Contact Center, Service Center)
- The user is now promoted into an agent, and the user will look similar to “Helen Patterson”, marked with a green circle in the screenshot above.

The agent functions will be available if you start ZyDesk, login with the user and select one of the following profiles: (Attendant Console, Contact Center or Service Center)

6.3.4 Table showing the differences between ZyDesk Users and Agents

This table displays which features and properties are available for ZyDesk users compared to agents.











Feature	Feature availability	
	ZyDesk User	Agent
User (Operator): Device	X	X
User (Operator): ID	X	X

User (Operator): Office Number	X	X
User (Operator): Default	X	X
Internal Phone Settings: SIP User ID	X	-
Internal Phone Settings: SIP Password	X	-
Internal Phone Settings: Default	X	-
Agent - Incoming Calls: Device	-	X
Agent - Incoming Calls: Default Type	-	X
Agent - Incoming Calls: Default	-	X
Agent - Incoming Calls: Media Server Number	-	X
Agent - Incoming Calls: Extension	-	X
Agent - Incoming Calls: SIP Trunk	-	X
Agent - Incoming Calls: Softphone Account	-	X
Agent - Incoming Calls: Softphone Password	-	X
Agent - Incoming Calls: Registration	-	X
Agent - Incoming Calls: Mobile Number	-	X
Agent - Incoming Calls: SIP Trunk	-	X
Agent - Incoming Calls: BroadWorks Number	-	X
Agent - Outbound Calls: Internal: Display name (SIP)	-	X
Agent - Outbound Calls: Internal: Caller ID (SIP)	-	X
Agent - Outbound Calls: External: Display name (SIP)	-	X
Agent - Outbound Calls: External: Caller ID (SIP)	-	X
Agent - Other Channels: Chat User (XMPP)	-	X
Agent - Other Channels: Chat User (XMPP) Password	-	X
Agent - Other Channels: Chat User (XMPP) Default	-	X
Agent - Other Channels: Chat User - SfB	-	X
Agent - Other Channels: Chat User - SfB: Default	-	X
Agent - Other Channels: Chat Display Name	-	X
Agent - Other Channels: Chat Display Name: Default	-	X
Agent - Other Channels: Mail Signature	-	X
Agent - Other Channels: Mail Signature: Default	-	X
User Preferences: Personal Pickup Annc.	-	X
User Preferences: Personal Pickup Annc.: Play for me	-	X
User Preferences: Offer Call	-	X
Skill Based routing: Skills	-	X
Skill Based routing: Available Skills	-	X
Skill Based routing: New Skill	-	X
Skill Based routing: Level	-	X

ZyDesk Access Settings: Enabled	X	X
ZyDesk Access Settings: User Level	X	X
ZyDesk Access Settings: Client Password: (Modify/new/confirm)	X	X
Queue Memberships	-	X
Profile Memberships	X	X
Privileges role memberships	X	X
Privileges role related privileges	X	X
Queues	-	X

6.4 Agents

This page displays a list of all users of the type “agent”.


Name:	Email:	Telephone:	Role:	
Helen Patterson	zhp@zylinc.com	Internal	User	  
Peter Hansen	zph@zylinc.com	Internal	User	  
ZyDesk Administrator	administrator@zylinc.com	Internal	Administrator	  
<i>Bulk administration of user settings</i>				


Name: Name of the agent


Email: Email of the agent

Telephone: Telephone type of the agent

Role: Role of the agent

 (Edit): Deep link shortcut to the “settings” tab sheet for this user.

 (Queues): Deep link shortcut to “queues” tab sheet for this user.

 (Membership): Deep link shortcut to “memberships” tab sheet for this user.

6.4.1 Agents Settings

6.4.1.1 User (Operator)

User (Operator):

Device: ID: Office Number: Default:

Device: The users telephone number used in Zylinc Operator products.

ID: Defines the User ID on the telephony system as used in Zylinc Operator products.

Office Number: Defines the number used in Zylincs Operator products.

Default: Use the default values for device, id, office number

6.4.1.2 Agent – Incoming Calls

Agent - Incoming Calls:			
Device:	<input type="text" value="Internal"/>	Default Type:	<input type="text" value="Zyline Media Server"/>
Media Server Number:	<input type="text" value="Internal"/>	Extension:	<input type="text"/>
Softphone Account:	<input type="text" value="zhp_zyline.com"/>	Password:	<input type="text" value="*****"/>
Mobile Number:	<input type="text"/>	SIP Trunk:	<input type="text" value="- default -"/>
BroadWorks Number:	<i>User must have a Contact Center Premium profile to have an Agent phone</i>		

Device: The users phone type when logged in as an agent.

Default Type: Defines the default type of agent phone.

Default: Use default values for device

Media Server Number: The number of the media server.

Extension: The users telephone number used in ZyDesk for AC/SC/CC Products. If a prefix is required, this must be added in front.

SIP Trunk: The SIP trunk used for this users number when routing to the telephone number set above.

Softphone Account: The SIP user id to use for the internal softphone.

Password: The password to use for the internal softphone.

Password Def.: If default is checked, the default password defined by the Operator in the SIP account page is used.

Registration: This setting decides how the SIP URI/user name is generated.

Mobile Number: The user's telephone number used in Zyline mobile clients - including mobile agent and ZyDesk follow-me functionality. If empty, the user's mobile number in the database will be used instead. If a prefix is required, this must be added in front. In case the number is empty, the prefix configured for external SIP trunk is added in front of the mobile number defined in the database. Note: If a number is defined in the mobile app the number in the app will always take priority.

SIP Trunk: The SIP trunk to be used when routing the call to the agent's mobile phone.

BroadWorks Number: User must have a Contact Center Premium profile to have an agent phone

6.4.1.3 Agent – Outbound Calls

Agent - Outbound Calls:	Internal	External
Display name (SIP):	<input type="text"/>	<input type="text"/>
Caller ID (SIP):	<input type="text" value="Anonymous"/>	<input type="text" value="Anonymous"/>

Internal Display name (SIP): The SIP display name to show on outgoing calls to internal numbers from the switchboard. If empty the 'display name (SIP) - external' will be used.

External Display name (SIP): The SIP display name to show on outgoing calls and blind transfers to external numbers from the switchboard. If empty, the full user name will be used.

Internal Caller ID (SIP): The Caller ID to show on outgoing calls to internal numbers from the switchboard. If empty, the 'caller id (SIP) - external' will be used.

External Caller ID (SIP): The Caller ID to show on outgoing calls and blind transfers to external numbers from the switchboard. If empty 'Anonymous' will be used.

6.4.1.4 Agent – Other Channels

Agent - Other Channels

Chat User (XMPP):	<input type="text"/>	?	Password:	<input type="text"/>	Default: <input checked="" type="checkbox"/> ?
Chat User - SfB:	<input type="text"/>	?	Default:	<input checked="" type="checkbox"/>	
Chat Displayname:	<input type="text"/>	?	Default:	<input checked="" type="checkbox"/>	
Mail Signature:				?	Default: <input checked="" type="checkbox"/>

Chat User (XMPP): The XMPP user address to use for chat queues.

Password: The password to use for the XMPP account.

Password Default: If default is checked, the default password defined by the Operator in the SIP Account page is used.

Chat User - SfB: The chat display name used when handling SfB chat.

Default: Use the system default settings.

Chat Displayname: The chat display name used when handling external chat. Note: To use this in for example a web-chat, the web-plugin must be able to handle the setting of chat display names.

Default: Use the system default settings.

Mail Signature: The email signature used when handling emails.

Default: Use the system default settings.

6.4.1.5 User Preferences

User Preferences:

Personal Pickup Annc.:	<input type="text" value="- none (default) -"/>	?	Play for me:	<input type="text" value="No (default)"/>	?
Offer Call:	<input type="text" value="No (default)"/>	?			

Personal Pickup Annc.: The personal pickup announcement to play when this user has answered the phone. A default setting for this value might be set for all users. Note: If the selected announcement does not exist for a language on a queue, the English version is always played - if it exists.

Play for me: If set to yes, this user will also hear the personal pickup announcement, otherwise only the caller will hear the announcement. A default setting for this value might be set for all users.

Offer Call: If set to yes, this user will be offered the call in the client before the call is routed to the selected phone. If no, the call is routed to the phone immediately. A default setting for this value might be set for all users.

6.4.1.6 Skill Based Routing

Skill Based routing: ?

Skills:

Available Skills: ?

New Skill:

Level: ?

Cars : 1 ?

Food : 1

Planes : 1

Boats : 2

Available Skills: List of available skills

New Skill: Enter the new skill to add to this agent

Level: Defines the skill-level of this user. The level factor is multiplied by the queues skill importance. Example: A queue has skill-Importance=3 and an agent have that skill with level=2. The agent gets a score of 6 and would get the call if no other has a higher score for this call.

The list to the right contains the skills and their level, for this agent.

6.4.1.7 ZyDesk Access Settings

ZyDesk Access Settings:

Enabled ? User Level: ?

Modify ?

Client Password: New

Confirm

Enabled: If checked the user is enabled for access. This setting can be used for example to temporary disable a user without removing him from all profiles.

User Level: The ZyDesk role assigned to this user. The user must be administrator to have full access to this portal. Note: If a user has been assigned a dynamic role then this role will overrule the ZyDesk level on the portals.

Client Password: Modify/new/confirm: The client password used when logging into the client using email address. Normally a user would use the Windows login but the email address together with this password can also be used to login to the client.

6.4.2 Agents Memberships

6.4.2.1 Queue Memberships

List of the queues that this user is a member of

Queue Memberships

Display Name:	Name:	Number:	Type:	
Main number voice queue	Main	91361	Voice	
Sales voice queue	Sales	1234	Voice	

Display Name: Display name of the queue

Name: Name of the queue

Number: Number of the queue

Type: Type of the queue

(Edit users): Deep link shortcut to the user's subpage of the queue

6.4.2.2 Profile Memberships

List of the ZyDesk profiles that this user is a member of

Profile Memberships

Profile Name:	
Attendant Console 6.0 Test Profile	
Service Center 6.0	
Service Center 6.0 Reception	

Profile name: Name of the profile

(Edit Access): Deep link to the user access subpage of this profile

6.4.3 Agents Privileges

6.4.3.1 Roles

Roles is a list of the dynamic roles that this user is granted access to

Roles

Name:	Description:	
Adhoc announcement rule	Manage ad-hoc announcements	
Opening hours	Manage opening hours	

Name: Name of the dynamic role

Description: Dynamic role description

(Role Users): Deep link that takes you directly to the "Role Users" subpage of this dynamic role

6.4.3.2 Privileges

Privileges is a list of all resulting "effective role related privileges" that are granted to this user through all its dynamic role memberships.

Privileges

Category:	Privilege:	Description:
Audio	Audio Adhoc Control	Rights to upload, delete and view list of Adhoc announcements.
Products	Voice Queues	Allow User to control Voice Queue Settings - if available.
Queues	Change Opening Hours	Rights to change all Opening Hours settings for a queue.

Impersonate

Category: Dynamic role category

Privilege: Name of privilege

Description: Description of the privilege

Impersonate: This changes your actual Admin Portal login so that you will from now on impersonate this user, and therefore can inspect what the Admin Portal looks like as seen by this user. This is very useful for testing role setups.

6.4.4 Agents Queues

User:

Helen Patterson

Queues**Available**

MailQueue01
ServiceChatQueue

Primary

Main number voice queue
Sales voice queue

**Result ?**

Main number voice queue
Sales voice queue

Secondary**Result ?****Standby****Result ?**

This Admin Portal page is similar to voice queue users. But the agent user is pre-selected and you can now add all the queues as “primary”, “secondary” and “standby”.

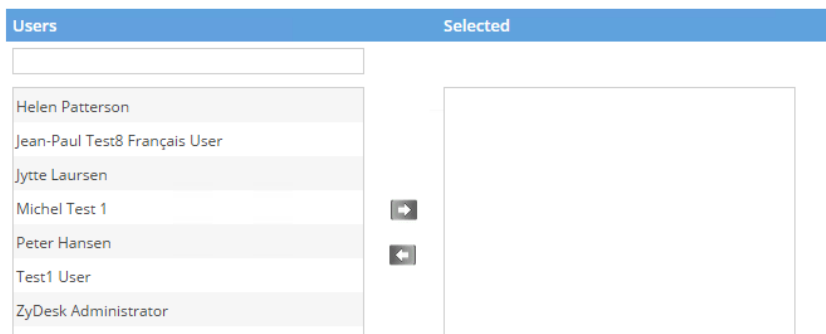
See “Voice Queue Users” for an explanation of “primary”, “secondary”, “standby” and “result”

6.4.5 Bulk administration of user settings

Bulk administration of user settings allow you to mass update one or more user options for a group of users at once.

6.4.5.1 Select which users to bulk update

All users are available in the users list to the left.

























Users can be selected by adding them to the “selected” list to the right.

All changes made on the rest of the page will be applied (if possible) to all selected users.

6.5 ZyDesk Users

This Admin Portal page displays a list of all the users of both type “ZyDesk User” and “Agent”


Name:	Email:	Role:	
Helen Patterson	zhp@zylinc.com	User	  
Jean-Paul Test8 Français User	tu8@zylinc.com	User	  
Jytte Laursen	zjl@zylinc.com	User	  
Michel Test 1	tumhet@zylinc.com	User	  
Peter Hansen	zph@zylinc.com	User	  
Test1 User	tu1@zylinc.com	User	  
ZyDesk Administrator	administrator@zylinc.com	Administrator	  


Bulk administration of user settings 


Name: Name of the user

Email: Email address of the user

Role: Roles of the user

 (Edit): Deep link shortcut to the “Settings” subpage for this user.

 (Queues): Deep link shortcut to “Queues” subpage for this user.

 (Membership): Deep link shortcut to “Memberships” subpage for this user.

6.5.1 Bulk administration of user settings

This function is identical to the one found in the “agents” menu.













See above: “bulk administration of user settings”

6.6 ZyDesk Profiles

This page displays a list of all available ZyDesk profiles that have been uploaded to the ZyDB database via the Deployment Manager.


A ZyDesk profile determines the products and features that are available to the profile users when they log in to ZyDesk. It also determines the list of other users that it is forbidden or permitted to see and interact with through the system.


You cannot create profiles in the Admin Portal, but you can choose which users have access to a given profile and administer the lists of which users that can be seen from the various profiles.

Profile Name:	Profile Type:	
Attendant Console 6.0	Attendant Console	 
Attendant Console 6.0 Test Profile	Attendant Console	 
Contact Center 6.0	ContactCenter	 
Operator 6.0	Operator	 
Service Center 6.0	ServiceCenter	 
Service Center 6.0 Reception	ServiceCenter	 

Profile name: Name of this profile

Profile type: Profile type

 (Access): Deep link that takes you directly to the “user access” subpage for this profile

 (View): Deep link that takes you directly to the “visible groups” subpage for this profile

6.6.1 ZyDesk Profiles User Access

The ZyDesk Profiles – User Access subpage makes it possible to include users or groups to ZyDesk profiles.

The screenshot shows the user management interface for a ZyDesk profile. At the top, the 'Profile Name' is set to 'Service Center 6.0'. Below this, there are four main panels:

- Available:** A list of users and groups. Under 'Person', there are Jean-Paul Test8 Français User, Jytte Laursen, Michel Test 1, and Test1 User. Under 'Group', there are Administrators, Level1_group1, Level2_group1, mssqlCloudSMRead, WebVPN-Sales, ZyExchange Test, zyincludegroup, Zylinc Exchange Sync Group, and Zylinc Lync Federated Users. A 'preview group' link is visible below the group list.
- Included:** A list of users and groups that have been added to the profile. It currently contains Helen Patterson, Peter Hansen, and ZyDesk Administrator.
- Excluded:** A list of users and groups that have been excluded from the profile. It is currently empty.
- Result:** A list of the final users and groups that have access to the profile. It contains Helen Patterson, Peter Hansen, and ZyDesk Administrator.

Arrows indicate the flow of users and groups from the 'Available' list to the 'Included' and 'Excluded' lists, and the 'Result' list is the final outcome of these actions.

Profile Name: Name of the selected ZyDesk profile, from which the selected users or groups will be included or excluded.

Available: The list called “available”, will show all available users, and all available groups. Note that individual users and groups will disappear from the “available” list, if they are added to either the “included” or the “excluded” lists. Therefore, you will have to remove them from a list, to be able to add them to another.

Preview group: When a group is selected, you can click on “preview group” to see an expanded list of the users that this group contains.

Group Level1_group1 contains 3 users:

Name:	Email:	DN:
Jean-Paul Test8 Français User	tu8@zylinc.com	CN=Test8 Français User,OU=TestUsersGrøæåp,OU=TestUsers,OU=ZyUsers,DC=Zylinc,DC=com
Level2_group1		CN=Level2_group1,OU=ZyGroups,DC=Zylinc,DC=com
Test1 User	tu1@zylinc.com	CN=Test1 User,OU=TestUsers,OU=ZyUsers,DC=Zylinc,DC=com

Included: When users or groups are added to this list, the ZyDesk profile will be available to those users or group members.

Excluded: You can add exceptions to the inclusion list by using exclusion. The excluded list will always “win” so all users that are a part of the exclusion list will never have permission to the ZyDesk profile

Result: This list show the resulting list of users that have access to this ZyDesk profile.

6.6.2 ZyDesk Profiles - Visible Groups

ZyDesk Profile - Visible Groups are used to control which users should be visible or hidden in ZyDesk. If a user is not visible, it will be hidden in ZyDesk and hence not returned in search results and so on.

Profile Name:
Service Center 6.0

Sync Method:
List Excluded Groups

Available groups

Group
Administrators
Level1_group1
Level2_group1
mssqlCloudSMRead
WebVPN-Sales
ZyExchange Test
zyincludegroup
Zylinc Exchange Sync Group
Zylinc Lync Federated Users
Zylinc Lync Test Users
Zylinc Lync Users
zylinc_ocs_users
ZylincSyncGroups
ZySVNAccess

preview group

Excluded Groups

Visible Users

Helen Patterson
Jean-Paul Test8 Français User
Jytte Laursen
Michel Test 1
Peter Hansen
Test1 User
ZyDesk Administrator

Profile Name: Name of the selected ZyDesk profile for which the “visible users” will be visible in.

Available groups: List of all available groups. Note that individual groups will disappear from this list, when they are added to the list to the right.

Preview group: Preview group: When a group is selected, you can click on “preview group” to see an expanded list of the users that this group contains.

Sync Method: Can be either “list included groups” or “list excluded groups”. “List included groups” will make the selected groups visible in ZyDesk. “List excluded groups” will make the list a blacklist so that the selected users will be invisible.

Included/Excluded Groups list: The title will change to either “Included Groups” or “Excluded Groups” depending on the sync method.

Visible Users: This list shows the result of all the selected users, that will be either included or excluded in ZyDesk (such as when searching).

6.7 Client Access

This Admin Portal page are used to specify which groups that should be given access to Mobile operator, Mobile Agent, Web Operator – CallAction and Event Board.

Since the default security type is “Exclude Groups” and all the group lists are empty, the default permissions are not restricted.

The screenshot shows the user configuration interface in the Zyline Admin Portal. On the left, there is a list of available groups under the heading "Available". The groups listed are: Administrators, Level1_group1, Level2_group1, mssqlCloudSMRead, WebVPN-Sales, ZyExchange Test, zyincludgroup, Zylinc Exchange Sync Group, Zylinc Lync Federated Users, Zylinc Lync Test Users, Zylinc Lync Users, zylinc_ocs_users, ZylincSyncGroups, ZySVNAccess, ZySync, and ZyTest's gruppen. To the right of this list are four configuration boxes for different roles: "Mobile Operator", "Mobile Agent", "Web Operator - CallAction", and "Event Board". Each box has a "+" icon to expand and a "-" icon to collapse. To the right of these boxes are three "Security Type" dropdown menus, all set to "Exclude Groups". At the bottom right, there is an "All Rooms" checkbox which is checked.

Available: This list shows all available groups.

Security Type: (Include groups or exclude groups). Defines how the list of security groups should be used: Include - Users in the listed groups have access. Exclude - Users in the listed groups do NOT have access.

Mobile operator, mobile agent, web operator – call action and event board: see the next 4 paragraphs.

6.7.1 Client Access - Mobile Operator vs. Mobile Agent

The Zyline mobile app for iOS and Android can be run in 2 different modes: Mobile Operator and Mobile Agent.

Feature	Feature availability	
	ZyMobile Operator	ZyMobile Agent
Phonebook dialer	X	X
Phonebook synchronization	X	X
Line state	X	X
Calendar	X	X
Insert Absence	X	X
Forward	X	X
Unattended transfer	X	X
Attended transfer	X	X
Availability notifications	X	X
Hunt groups	X	X
Agent and Queues	-	X

Note that the ZyMobile Operator provides all the mobile app functionality except queues and agents. The only difference between “operator” and “agent” is the ability to subscribe to Queues.

The group added to “mobile operator” will be either included or excluded from the mobile operator functionality.

The group added to “mobile agent” will be either included or excluded from the mobile agent functionality.

6.7.2 Client Access - Web Operator – CallAction

Web Operator Call Action is a product add-on that provides the extra feature “Call Action” to the “Web Operator” product.

The group added to “Web Operator – CallAction” will be either included or excluded from accessing the Web Operator Call Action functionality.

6.7.3 Client Access - Event Board

The group added to “event board” will be either included or excluded from the “event board”

Event Board: All Rooms: When checked all entrees in AD with a 'Room Mailbox' are available in event board.

6.8 Client Security Rules

Security Rules

Rule Name:	Rule Type:	Rule Relation Type:
------------	------------	---------------------

- No security rules defined for *Forward* => Full Right for all users.
- No security rules defined for *Absence* => Full Right for all users.
- No security rules defined for *Activity* => Full Right for all users.
- No security rules defined for *Pick Calls* => Full Right for all users.
- No security rules defined for *Caller Info - Internal* => Full Right for all users.
- No security rules defined for *Caller Info - External* => Full Right for all users.
- No security rules defined for *Directory Management* => Full Right for all users.
- No security rules defined for *Directory Management (custom)* => Full Right for all users.
- No security rules defined for *Presence* => Full Right for all users.
- No security rules defined for *Visibility* => Full Right for all users.
- No security rules defined for *Calendar Free/Busy* => Full Right for all users.
- No security rules defined for *Calendar Details* => Full Right for all users.
- No security rules defined for *Supervisor* => Full Right for all users.

[Add Security Rule](#)

Client Security Rules are used to define security rules for client functions. By default, no security rules are defined, which effectively means that client features are not restricted.

The rule becomes active, and restrictions start to take effect as soon as a security rule is added. It does not matter whether users are added to the rule it or not.

6.8.1 Client Security Rule Types

Rule type	Description	Applies to		
		ZyDesk	Mobile	Web
Absence	Rights to create and cancel absence appointments	X	X	X
Activity	Rights to create and cancel activities	X	X	X
Calendar details	Rights to view calendar details (subject and location)		X	X

Calendar free/busy	Rights to view free/busy calendar information		X	X
Caller info – external	Rights to view caller Information external, i.e. information about who colleagues are talking to for external calls	X		
Caller info – internal	Rights to view caller Information internal, i.e. information about who colleagues are talking to for internal calls	X		
Directory Management	Rights to edit directory fields for other users	X		X
Directory Management (custom)	Rights to edit/delete custom users owned by others.	X		X
Forward	Rights to forward users phone	X	X	X
Pick calls	Definitions of pickup-groups	X	X	
Presence	Rights to view presence/line state information		X	X
Supervisor	Rights to log other users in/out of hunt groups.	X		
Visibility	Visibility of user/searches.		X	X

6.8.2 Adding a new Client Security rule

Rule Name:

Rule Type:

Rule Relation Type:

Available groups

- Group
- Administrators
- Level1_group1
- Level2_group1
- mssqlCloudSMRead
- WebVPN-Sales
- ZyExchange Test
- zyincludegroup
- Zylinc Exchange Sync Group
- Zylinc Lync Federated Users
- Zylinc Lync Test Users
- Zylinc Lync Users
- zylinc_ocs_users
- ZylincSyncGroups
- ZySVNAccess

Included Groups

- Myself only --

preview group

Rule name: Name of the new rule to be added

Available groups: Group or user to add to this rule

Rule type: The functionality that this rule should restrict

Included group: Displays the groups or persons that are added to this rule

Rule relation type: see example in the next chapter

6.8.3 Client Security Rules Illustrative Example

This is an example of 3 groups and 9 users:

Group X 3 members	Group Y 3 members	Group Z 3 members	All users 9 total
X1 X2 X3	Y1 Y2 Y3	Z1 Z2 Z3	X1 X2 X3 Y1 Y2 Y3 Z1 Z2 Z3

6.8.3.1 Example of “Same group only”

“Same group only” gives access to the functionality to users within the same groups. But the permissions are not given between different groups.

Table showing effective “same group only” permissions when Group X + Group Y are included but Group Z is not included:

	X1	X2	X3	Y1	Y2	Y3	Z1	Z2	Z3
X1	*	*	*						
X2	*	*	*						
X3	*	*	*						
Y1				*	*	*			
Y2				*	*	*			
Y3				*	*	*			
Z1							*		
Z2								*	
Z3									*

6.8.3.2 Example of “Between groups only”

“Between groups only” gives access to the functionality to users between all the groups that are included.

Table showing effective “Between groups only” permissions when Group X + Group Y are included but Group Z is not included:

	X1	X2	X3	Y1	Y2	Y3	Z1	Z2	Z3
X1	*	*	*	*	*	*			
X2	*	*	*	*	*	*			
X3	*	*	*	*	*	*			
Y1	*	*	*	*	*	*			
Y2	*	*	*	*	*	*			
Y3	*	*	*	*	*	*			
Z1							*		
Z2								*	
Z3									*

6.8.3.3 Example of “System wide rights”

“System wide rights” gives access to the functionality to all users in the system, for the included groups.





Table showing effective “System wide rights” permissions when Group X + Group Y are included but Group Z is not included.

	X1	X2	X3	Y1	Y2	Y3	Z1	Z2	Z3
X1	*	*	*	*	*	*	*	*	*
X2	*	*	*	*	*	*	*	*	*
X3	*	*	*	*	*	*	*	*	*
Y1	*	*	*	*	*	*	*	*	*
Y2	*	*	*	*	*	*	*	*	*
Y3	*	*	*	*	*	*	*	*	*
Z1							*		
Z2								*	
Z3									*










6.9 Admin Roles & Privileges

Admin Roles & Privileges are used to restrict user access to various features in the Admin Portal.

Fixed Roles

Role:	Description:	Users:	
Administrator	Administrator Role with Full Control.	1	 
User	User Role without any Administration rights.	6	 

Dynamic Roles

Role:	Description:	Users:	
Adhoc announcement rule	Manage ad-hoc announcements	1	  
All role	?	1	  
Opening hours	Manage opening hours	1	  

[Add Dynamic Role](#)

6.9.1 Fixed Roles

Two fixed legacy “built in” roles exist:

Role name	Permissions
Administrator Role	Full access to everything in the Admin Portal
User Role	No access to any functions in the Admin Portal

6.9.2 Dynamic Roles

A Users access permission to various parts of the Admin Portal can be customized via Dynamic Roles.

A dynamic role must always include a privilege of the category “product”. Otherwise, the role will not work. Privileges cannot be selected on their own without an accompanying product.

6.9.3 Add Dynamic Role and Dynamic Role Privileges

Role Name: Adhoc announcement rule	Description: Manage ad-hoc announcements
Selected Privilege:	
Available Privileges <ul style="list-style-type: none"> Audio Audio Custom Control Audio Full Control Audio Lists Audio Moh Control Audio Recording Copy/Clear Audio Recording Define Client Broadcast allowed Client Absence Client Activity Client Appointment Categories Client Full Control General Settings Global Timer - Routing Global Timers - Agent Timer Profiles Forwarding Add/Dell/Modify Forwarding Departments Change Spoken Absence rules Forwarding full control Modify Forwarding Departments Modify policies Set/Change forwarding Network Network Full Control Products Chat Queues Mail Queues Mobile Operator Social Media Queues 	Selected Privileges <ul style="list-style-type: none"> Audio Audio Adhoc Control Products Voice Queues

Role name: Name of the new or existing dynamic role

Description: Description of the role

Available privileges: A categorized list of all available privileges

Selected privileges: The currently selected privilege for this role

A dynamic role must always include a privilege of the category “product”. Otherwise, the role will not work. Privileges cannot be selected on their own without an accompanying product.

6.9.3.1 Complete list of all Dynamic Role Privilege descriptions

Category	Privilege	Description
Audio	Audio Adhoc Control	Rights to upload, delete and view list of Adhoc announcements.
Audio	Audio Custom Control	Rights to upload, delete and view list of Custom announcements.
Audio	Audio Full Control	Full Control to the Audio menu.
Audio	Audio Lists	Rights to view list of audio files and to listen to these.
Audio	Audio Moh Control	Rights to upload, delete and view list of Music-On-Hold.
Audio	Audio Recording Copy/Clear	Rights to copy and clear Announcement Recordings.
Audio	Audio Recording Define	Rights to add and delete Voice recordings files.
Client	Broadcast allowed	Rights to broadcast a message to all active client.
Client	Client Absence	Rights to change absence templates.
Client	Client Activity	Rights to broadcast a message to all active client.
Client	Client Appointment Categories	Rights to change how Appointments Categories are shown in the client.
Client	Client Full Control	Full rights to the Client menu.
Client	General Settings	Rights to change General Settings for queues and clients.
Client	Global Timer - Routing	Rights to modify Global timers Routing settings for all queues. This includes timers that effect routing but excludes User time-outs.
Client	Global Timers - Agent	Rights to modify Global timers Agent settings for all queues, such as user timeouts etc.
Client	Timer Profiles	Rights to change Timer profiles.
Forwarding	Add/Dell/Modify Forwarding Departments	Right to add, delete and modify forwarding departments.
Forwarding	Change Spoken Absence rules	Right to change rules related Spoken Absence.
Forwarding	Forwarding full control	Full Control of all Forwarding settings.
Forwarding	Modify Forwarding Departments	Rights to modify forwarding departments.
Forwarding	Modify policies	Rights to change forwarding policies for departments.
Forwarding	Set/Change forwarding	Right to change forwarding for users.
Network	Network Full Control	Full Control to the Network menu.
Products	Chat Queues	Allow User to control Chat Queue Settings - if available.
Products	Mail Queues	Allow User to control Mail Queue Settings - if available.
Products	Mobile Operator	Allow User to control Mobile Operator settings - if available.
Products	Social Media Queues	Allow User to Center Chat Queue Settings - if available.

Products	Voice Queues	Allow User to control Voice Queue Settings - if available.
Products	Voicemail	Allow User to control Voicemail settings - if available.
Products	ZyDesk	Allow User to control ZyDesk settings - if available.
Queues	Adhoc announcements	Rights to add/remove ad hoc announcements on a queue.
Queues	Announcements	Rights to change announcements on a queue. Failure/Closed announcement are excluded from this privilege.
Queues	Calendar Edit	Full Control to the Calendar menu.
Queues	Calendar Lists	Allowed to see lists of calendars.
Queues	Call Lookup	Rights to change Call Lookup settings for CC queue.
Queues	Call Reason Codes	Rights to set Call Reason codes on a queue
Queues	Callback Settings	Rights to change Callback settings, incl. announcement and activation limits.
Queues	CallBacks View/Delete	Allow Users to view and delete callbacks on the admin portal.
Queues	Caller Rated Routing	Rights to change settings for caller rated routing on a queue.
Queues	Change Members	Rights add/remove members on a queue (note: this does not affect Users.).
Queues	Change Opening Hours	Rights to change all Opening Hours settings for a queue.
Queues	Change Users	Rights to add/remove users on a queue and to change their role (Primary, Secondary etc.).
Queues	Customer Survey	Rights change settings for customer survey.
Queues	Dial Lists View/Upload/Delete	Allow Users to view, upload and delete entrees from Dial Lists.
Queues	Digit Collection Settings	Rights to change Digit Collection settings, incl. announcement.
Queues	Display name	Rights to change display name of a queue.
Queues	Distribution Settings	Rights to change settings related to call distribution.
Queues	Failover Forwarding	Rights to change failover/closed forwarding settings for a queue.
Queues	Failover Settings	Rights to change general failover/closed settings for a queue. Forwarding settings are excluded from this privilege.
Queues	IVR Action Modify	Rights to modify IVR Actions.
Queues	IVR Menu & Actions Add/Del/Modify	Rights to add, delete and modify IVR Menus and Actions.
Queues	IVR Menu & Actions Modify	Rights to modify IVR Menus and Actions.
Queues	Language Change	Rights to change Language on a queue.
Queues	Mail Queue Connection Settings	Right to change Mail Queue connection settings.

Queues	Personal Queue change	Rights to enable/change/modify all users personal queue settings.
Queues	Queue Alarms	Rights to add/del/change Queue Alarms.
Queues	Queue Lists	Allow User to see list of queues.
Queues	Queue Timers	Rights to modify Queue Timers.
Queues	Queues Add/Del/Modify	Rights to add, delete and modify queues.
Queues	Queues Directory ID	Rights to change Directory ID for a queue.
Queues	Queues Full Control	Full right to the Queue menu. This privilege is required to add and delete queues and to change name and number of a queue.
Queues	Skills Add/Remove	Rights to add/remove existing skills on a queue.
Queues	Skills Full Control	Rights to add/remove skills on a queue and create/delete new skills.
Queues	Thresholds	Rights to change threshold on a queue, incl. Queue Limit, Service goals, WrapUp time etc.
Queues	Admin/Stat all queues	Allow user to administrate and see statistics of all queues, even if the user is not a member of a queue.
Queues	Administrate member queues	Allow user to administrate all queues the user is a member of (not just owners).
Queues	Wallboard Add/Del/Modify	Rights to add, delete and modify wallboards.
Queues	Wallboard Full Control	Rights to configure/add/delete wallboards.
Queues	Wallboard Update	Rights to update text on wallboards.
Statistics	Statistics Portal Access	Access to Statistics Portal.
Statistics	View all users	Allow user to see statistics of all user. Without this privilege only users on own queues are visible.
Statistics	View Chat Dialogue	Rights to view contents of a chat queue dialogue if logged in the 'Statistics' portal.
Supervisor	Barge In	Right to barge in and whisper in on other agents' conversations. Privilege is limited to agents the user share queues with.
Supervisor	Listen In	Right to listen in on other agents' conversations. Privilege is limited to agents the user share queues with.
Supervisor	Log Agents in and out	Right to log other agents in and out of the solution. Privilege is limited to agents the user share queues with.
Supervisor	Log users in and out of huntgroups	Right to log other users in and out of BroadWorks hunt groups
System	System Full Control	Full Control to the Systems menu.
User	Profile Lists	Right to see profile lists in a table.
User	Roles Control	Rights to add/delete/change/modify roles and privileges the user is a member of.
User	Security Rules/Access	Right to see and edit Client Security Groups & Client Access.
User	Skills Add/Remove	Rights to add/remove existing skills on a user.

User	Skills Full Control	Rights to add/remove skills on a user and create/delete new skills.
User	User Change Others CallerID/Displayname	Rights to change other users caller id and display name.
User	User Change Others Phone Number	Rights to change other users phone number.
User	User Change Others Pickup Announcement	Rights to change others Pickup Announcement.
User	User Change Own CallerID/Displayname	Rights to change other users caller Id and Display name.
User	User Change Own Phone Number	Rights to change own Phone number.
User	User Change Own Pickup Announcement	Rights to change own Pickup Announcement.
User	User Change Phonetype	Rights to change to any phone type in the system.
User	User Full Control	Full Control to the User menu.
User	User Lists	Rights to see list of users and their key data.

6.9.4 Dynamic Role Users

Role Name:
Adhoc announcement rule

Description:
Manage ad-hoc announcements

Available

Group

- Administrators
- Level1_group1
- Level2_group1
- mssqlCloudSMRead
- WebVPN-Sales
- ZyExchange Test
- zyincludegroup
- Zylinec Exchange Sync Group
- Zylinec Lync Federated Users
- Zylinec Lync Test Users
- Zylinec Lync Users
- zylinec_ocs_users
- ZylinecSyncGroups
- ZySVNAccess

Included

Person

- Helen Patterson

Result

Helen Patterson

Save

Role name: Name of the dynamic role

Description: Description of the dynamic role.

Available: A list of all groups and all users that this dynamic role can be given to

Included: These users or groups are included as a having this role

Excluded: This users are excluded/blacklisted from this role.

Result: The resulting list of users that this role is assigned to.

7 Step-by-step-guides for typical tasks


7.1 How to enable and configure an agent to receive calls from queues







To enable and configure a user to receive calls from queues, the following steps are necessary:


- Map the user to a ZyDesk profile that supports agents
- Enable the user for ZyDesk access (“create on save”)
- Add the agent to a queue

The user can now start ZyDesk, and start to receive calls from queues.

Here is a step-by-step guide to do that:

1. The user must already exist in the system
2. The user must have a working phone with a working phone number and with working line state and call control. (See the 3 next paragraphs below, for info about how to validate these 3 requirements.
3. A ZyDesk profile that supports queues and agents, and at least 1 license for it must exist. Valid profile types are: Attendant Console, Contact Center or Service Center. Upload such a profile via Deployment Manager, and make sure you have requested a valid license for the feature before continuing.
4. Navigate to Admin Portal / Users / ZyDesk Profiles, and click on the lock icon  next to a profile that supports queues and agent functionality (either Attendant Console, Contact Center or Service Center). We use the “Service Center 6.0” in this case

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
CLIENT PROFILES			Agents				
			ZyDesk Users				
			ZyDesk Profiles				
Profile Name:			Client Access	Profile Type:			
Attendant Console 6.0			Client Security Rules	Attendant Console			
Attendant Console 6.0 Test Profile			Admin Roles & Privileges	Attendant Console			
Contact Center 6.0				ContactCenter			
Operator 6.0				Operator			
Service Center 6.0				ServiceCenter			
Service Center 6.0 Reception				ServiceCenter			

5. Find the user (in this case Lisa Davis), or a group that the user is a member of in the “Available” list to the left, and click on the right arrow icon  to add the user to the “Included”

list.

QUEUES CLIENTS AUDIO **USERS** FORWARDING NETWORK SYSTEM INSTALL

CLIENT PROFILES Service Center 6.0 USER ACCESS | VISIBLE GROUPS

Profile Name: Service Center 6.0

Available

- ZyLinc Lync Federated Users
- ZyLinc Lync Test Users
- ZyLinc Lync Users
- zylinc_ocs_users
- ZyLincSyncGroups
- ZySVNAccess
- ZySync
- ZyTest's grupper
- Zytæst Grøåp
- Zytæst SubGrøåp
- Person**
- Barbara Hall
- Jytte Laursen
- Lisa Davis**
- Robert Smith

preview group

Included

Person

- Helen Patterson
- John Doe
- Peter Hansen
- ZyDesk Administrator

Excluded

Result

- Helen Patterson
- John Doe
- Peter Hansen
- ZyDesk Administrator

Save

6. Save

7. Go back and verify that the user (in this case Lisa Davis) is now listed in the "Result" list.

QUEUES CLIENTS AUDIO **USERS** FORWARDING NETWORK SYSTEM INSTALL

CLIENT PROFILES Service Center 6.0 USER ACCESS | VISIBLE GROUPS

Profile Name: Service Center 6.0

Available

Person

- Barbara Hall
- Jytte Laursen
- Robert Smith

Group

- Administrators
- Level1_group1
- Level2_group1
- Local Computer Admins
- mssqlCloudSMRead
- Remote Desktop Users
- Services
- WebVPN-Sales
- ZyExchange Test
- zyincludegroup

preview group

Included

Person

- Helen Patterson
- John Doe
- Lisa Davis**
- Peter Hansen
- ZyDesk Administrator

Excluded

Result

- Helen Patterson
- John Doe
- Lisa Davis**
- Peter Hansen
- ZyDesk Administrator

Save

- Navigate to Admin Portal / Users / ZyDesk Users and click on the user. (Lisa Davis in this case). Note that she is listed in ~~struckthrough~~ font since she is not yet enabled for ZyDesk access.

ZYDESK USERS		Agents	
		ZyDesk Users	
		ZyDesk Profiles	
Name:	Email	Client Access	Role:
Barbara Hall	tu0@z	Client Security Rules	User
Helen Patterson	zhp@z	Admin Roles & Privileges	User
John Doe	jjp@zylinc.com		User
Jytte Laursen	zjl@zylinc.com		User
Lisa Davis	tumhe1@zylinc.com		User
Peter Hansen	zph@zylinc.com		User
Robert Smith	tu1@zylinc.com		User
ZyDesk Administrator	administrator@zylinc.com		Administrator

- After clicking on the user, scroll to the bottom of the page and enable the checkbox called "Create on save"

Level: ?

ZyDesk Access Settings:

Note: User not yet created for ZyDesk access!

Enabled ? **Create on save ?** User Level: User


Modify ?



















Client Password: New Confirm


Save










- Save
- Navigate to Admin Portal / Users / Agents and verify that the user (in our case Lisa Davis) is no longer listed with ~~struckthrough~~ font, and that a queue icon appears to the right.

AGENTS		Agents	
		ZyDesk Users	
		ZyDesk Profiles	
Name:	Email:	Client Access	Telephone:
Helen Patterson	zhp@zylinc.com	Client Security Rules	Internal
John Doe	jjp@zylinc.com	Admin Roles & Privileges	Internal
Lisa Davis	tumhe1@zylinc.com		
Peter Hansen	zph@zylinc.com		+4588336654;ext=603
ZyDesk Administrator	administrator@zylinc.com		Internal

12. Click on the queue icon  to the right of the user (in this case Lisa Davis).

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
AGENTS							
Name:	Email:	Telephone:	Role:				
Helen Patterson	zhp@zylinc.com	Internal	User				
John Doe	jip@zylinc.com	Internal	User				
Lisa Davis	tumhe1@zylinc.com		User				
Peter Hansen	zph@zylinc.com	+4588336654;ext=603	User				
ZyDesk Administrator	administrator@zylinc.com	Internal	Administrator				
Bulk administration of user settings 							

13. Select the queue (in this case “Main number voice queue”) and click on the right arrow icon  to add the queue to this users primary queues. (Secondary or standby will also work).

QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
AGENTS				Lisa Davis		SETTINGS MEMBERSHIPS PRIVILEGES QUEUES	
User:							
Lisa Davis							
Queues							
Available	Primary	Result ?					
Accounting Voice Queue							
MailQueue							
Main number voice queue							
Sales voice queue							
ServiceChatQueue							
	Secondary	Result ?					
							
							
	Standby	Result ?					
							
							

14. Save

15. Go back and verify that the selected queue is now in the results list of the agent's queues.

The screenshot shows the 'Queues' configuration page for agent Lisa Davis. At the top, there are navigation tabs: QUEUES, CLIENTS, AUDIO, USERS, FORWARDING, NETWORK, SYSTEM, and INSTALL. Below this, the user's name 'Lisa Davis' is displayed, along with links for SETTINGS, MEMBERSHIPS, PRIVILEGES, and QUEUES. The 'User:' section shows 'Lisa Davis' in a dropdown menu. The 'Queues' section is divided into three categories: Available, Primary, and Standby. The 'Available' list contains 'Accounting Voice Queue', 'MailQueue01', 'Sales voice queue', and 'ServiceChatQueue'. The 'Primary' queue is 'Main number voice queue', which is circled in red in the 'Result' column. The 'Secondary' and 'Standby' queues are currently empty.

The user is now an agent and will be able to log into ZyDesk and then receive calls from the queues.

7.1.1 How to test a user's phone number before promoting a ZyDesk user to an agent

Test that the ZyCall Switch is able to call/reach the user's phone via its phone number. This is not the same as calling one phone from another phone on the PBX. Instead, we use the ZyDesk Internal Softphone to create the test call via ZyCall Switch and the relevant SIP trunk:

1. Navigate to Admin Portal / Users / Agents and click on ZyDesk Administrator
2. Change "Agent - Incoming Calls, Device" to "Internal" (you must de-select the Default: checkbox to be able to change this value)
3. Log into ZyDesk with the ZyDesk Administrator user
4. Use ZyDesk to call the user's phone number. Verify that the phone rings. This means that the ZyCall Switch Server is able call this agent's specific phone number via a SIP trunk on the ZyCall Switch.

7.1.2 How to test a user's line state before promoting a ZyDesk user to an agent

In many cases, such as when installing a new customer, only one user (ZyDesk Administrator) may exist and be able to start ZyDesk. We only have this user available to view line state on other users.

But ZyDesk cannot view primary line state across different PBX types and since the ZyDesk Administrator is on its own PBX type using internal softphone, this user cannot display e.g. Cisco or BroadWorks line state, unless we change the "operator" part of the ZyDesk Administrator to use the same PBX type.

1. De-select the "default" checkbox for ZyDesk Administrator User (Operator) Device
2. Change ZyDesk Administrator User (Operator) Device to same type as the user to be tested

Cisco phone	BroadWorks phone
Change ZyDesk Administrator User (Operator) Device type to Cisco	Change ZyDesk Administrator User (Operator) Device type to BW Deskphone

3. Now the ZyDesk Administrator is on the same phone type. When you log in to ZyDesk with ZyDesk Administrator, you should now be able to see line state on all the PBX users. Verify that line state is displayed next to the user that should be promoted to agent.

7.1.3 How to test call control before promoting a ZyDesk user to an agent

Log into ZyDesk with the newly created agent user and place a call to the queue. Use the mouse (since keyboard shortcuts may be unmapped or unknown at this point) and click on the answer button in ZyDesk. The call should be automatically answered, without the need to manually pick up the call via the phone.

7.2 How to create a voice queue

Before starting, you will need a phone number for the queue that must be routed to the ZyCall Switch Server.

7.2.1 Create a voice route so the queue number reaches the ZyCall Switch server

1. Create a voice route on your existing PBX, so that the number for the queue is routed to the ZyCall Switch server.
2. Call this new number and verify that the call actually reaches the switch and that it is logged in the bottom of the "full" log. (Admin Portal / Install / Server Logs / asterisk-logs / full). In this screenshot, the number for the queue is 765432. Go to the bottom of the full log. Use the browsers search feature to search for the number.

```

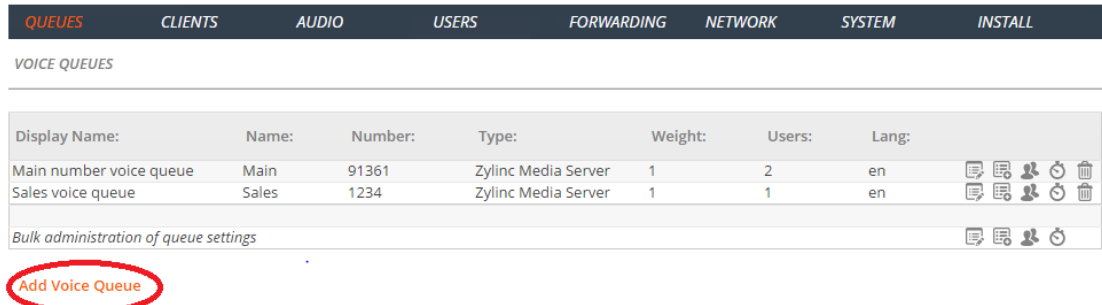
4032 [Mar 7 13:32:04] VERBOSE[2523] chan_sip.c: == *** ZyPatch *** Assigning ToNumber "765432" to
sip sip_pvt - chan_sip.c:23829 handle_request_invite
4033 [Mar 7 13:32:04] VERBOSE[2523] netsock2.c: == Using SIP RTP TOS bits 184
4034 [Mar 7 13:32:04] VERBOSE[2523] netsock2.c: == Using SIP RTP CoS mark 5
4035 [Mar 7 13:32:04] VERBOSE[2523] chan_sip.c: == *** ZyPatch *** Assigning ToNumber "765432" to
channel SIP/domain-00000000 - chan_sip.c:7376 sip_new
4036 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Executing [765432@default:1]
Set("SIP/domain-00000000", "SipTrunk=default") in new stack
4037 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Executing [765432@default:2]
Goto("SIP/domain-00000000", "ZyIncoming,765432,1") in new stack
4038 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Goto (ZyIncoming,765432,1)
4039 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Executing [765432@ZyIncoming:1]
UserEvent("SIP/domain-00000000", "DB,Evt: Error_CatchAll,SipTrunk: default,DialedNumber:
765432,Channel: SIP/domain-00000000") in new stack
4040 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Executing [765432@ZyIncoming:2]
Hangup("SIP/domain-00000000", "1") in new stack
4041 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: == Spawn extension (ZyIncoming, 765432, 2) exited
non-zero on 'SIP/domain-00000000'
4042 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Executing [h@ZyIncoming:1]
Gosub("SIP/domain-00000000", "SubRemoveZyChannel,s,1") in new stack
4043 [Mar 7 13:32:04] VERBOSE[2738] pbx.c: -- Executing [s@SubRemoveZyChannel:1]
GotoIf("SIP/domain-00000000", "?10") in new stack
    
```

If the voice route works as expected, the number should be visible near the bottom of the log. Line 4039 shows an “Error_CatchAll” error that means that this number is not yet assigned to a queue. We have now verified that the voice route works, and that the call reaches the ZyCall Switch.

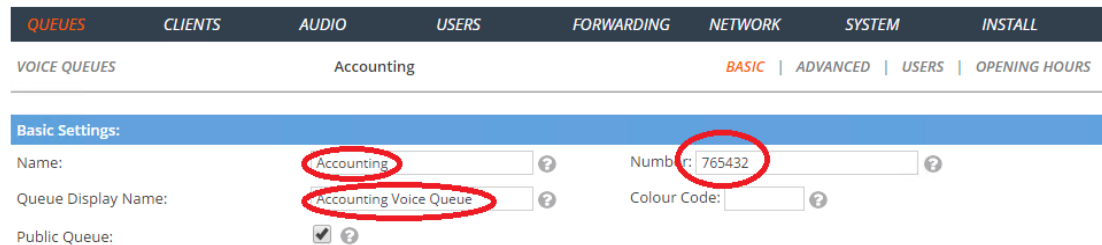
3. Make a note of how the number looks in this log. Is a country code or other prefix added to or removed from the start of the number?

7.2.2 Add a new Voice Queue in the Admin Portal

1. Navigate to Admin Portal / Queues / Voice Queues and click on “Add Voice Queue”



2. Specify the 3 values: “name”, “queue display name” and “number”


















3. Save





4. The new voice queue is now created

QUEUES CLIENTS AUDIO USERS FORWARDING NETWORK SYSTEM INSTALL

VOICE QUEUES


Queue Accounting successfully created.

Display Name:	Name:	Number:	Type:	Weight:	Users:	Lang:	
Accounting Voice Queue	Accounting	765432	Zylinec Media Server	1	0	en	    
Main number voice queue	Main	91361	Zylinec Media Server	1	2	en	    
Sales voice queue	Sales	1234	Zylinec Media Server	1	1	en	    

Bulk administration of queue settings    
















[Add Voice Queue](#)





7.2.3 Specify the Queue Opening hours and an “open today” exception

1. Click on the Opening Hours icon  for the new queue

QUEUES CLIENTS AUDIO USERS FORWARDING NETWORK SYSTEM INSTALL


VOICE QUEUES

Display Name:	Name:	Number:	Type:	Weight:	Users:	Lang:	
Accounting Voice Queue	Accounting	765432	Zylinec Media Server	1	0	en	    
Main number voice queue	Main	91361	Zylinec Media Server	1	2	en	    
Sales voice queue	Sales	1234	Zylinec Media Server	1	1	en	    

Bulk administration of queue settings    

[Add Voice Queue](#)

2. Adjust the opening hours as required

Queue	Language	Timezone
Accounting	English	Server time zone 

Opening Hours:

Monday	<input checked="" type="checkbox"/>	08:00 - 16:00
Tuesday	<input checked="" type="checkbox"/>	08:00 - 16:00
Wednesday	<input checked="" type="checkbox"/>	08:00 - 16:00
Thursday	<input checked="" type="checkbox"/>	08:00 - 16:00
Friday	<input checked="" type="checkbox"/>	08:00 - 16:00
Saturday	<input type="checkbox"/>	08:00 - 16:00
Sunday	<input type="checkbox"/>	08:00 - 16:00

3. Add an "Extra open" exception so that the new queue is open today.




Enable the "Open:" checkbox

Click on the "Right arrow", this will add today's date to the list. Note that [Op] is visible next to today's date, which tells us that the queue is extra open today, the whole day from 00:00 to 23:59:59.

4. Save

7.2.4 Select a welcome announcement and test that it is played

1. Click on the basic icon  for the new queue

Display Name:	Name:	Number:	Type:	Weight:	Users:	Lang:	
Accounting Voice Queue	Accounting	765432	Zylinc Media Server	1	0	en	
Main number voice queue	Main	91361	Zylinc Media Server	1	2	en	
Sales voice queue	Sales	1234	Zylinc Media Server	1	1	en	


Bulk administration of queue settings





Add Voice Queue

2. Change the welcome announcement to "sa_thankyou"

3. Save
4. Call the queue number. The welcome announcement "thank you for your call" should be played.



7.2.5 Add a “ZyDesk access enabled” agent user to the queue

1. Click on the users icon  for the new queue



QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES							
Display Name:	Name:	Number:	Type:	Weight:	Users:	Lang:	
Accounting Voice Queue	Accounting	765432	Zylinec Media Server	1	0	en	
Main number voice queue	Main	91361	Zylinec Media Server	1	2	en	
Sales voice queue	Sales	1234	Zylinec Media Server	1	1	en	
Bulk administration of queue settings							

Add Voice Queue

2. Select an agent enabled user with ZyDesk access and click on the right arrow to add the user as a primary agent to the queue

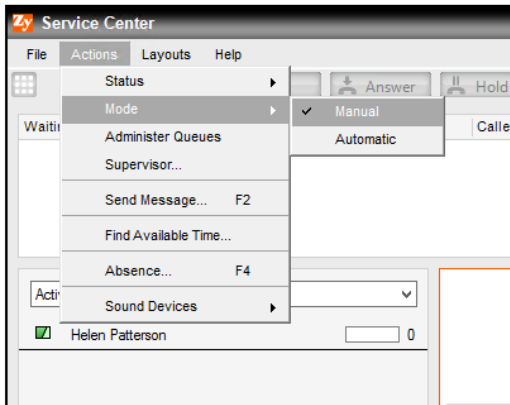
QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES							
Accounting			BASIC ADVANCED USERS OPENING HOURS				
Queue: Accounting							
Queue Users							
Available		Primary ?		Result ?			
Person Helen Patterson Peter Hansen ZyDesk Administrator Group Administrators Level1_group1 Level2_group1 mssqlCloudSMRead		 					
		Secondary ?		Result ?			

3. The agents name will show up in the primary list

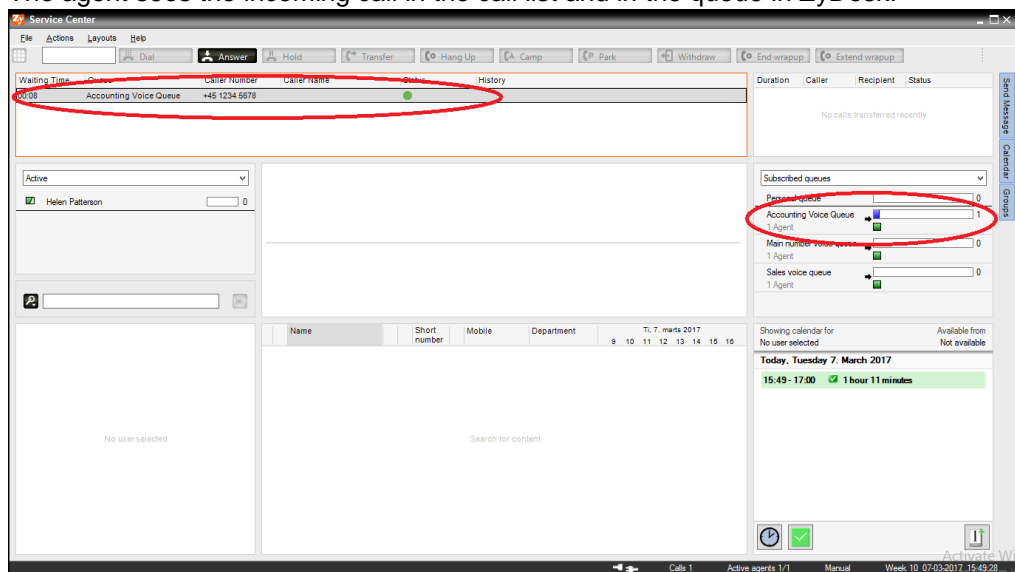
QUEUES	CLIENTS	AUDIO	USERS	FORWARDING	NETWORK	SYSTEM	INSTALL
VOICE QUEUES							
Accounting			BASIC ADVANCED USERS OPENING HOURS				
Queue: Accounting							
Queue Users							
Available		Primary ?		Result ?			
Person Peter Hansen ZyDesk Administrator Group Administrators Level1_group1 Level2_group1 mssqlCloudSMRead WebVPN-Sales		 		Helen Patterson			
		Secondary ?		Result ?			

7.2.6 Log into ZyDesk with the agent user verify that the call arrives to the queue

1. Log into ZyDesk “service center” as the agent user you just added as primary to the queue. Even though that this agent does not have a working default phone type, we should be able to verify that the call arrives to the queue.
2. Change “call distribution mode” from “automatic” to “manual”. (ZyDesk / Menu / Actions / Mode / Manual)



3. Call the queue and verify that:
 - a. The welcome announcement is played
 - b. The agent sees the incoming call in the call list and in the queue in ZyDesk:

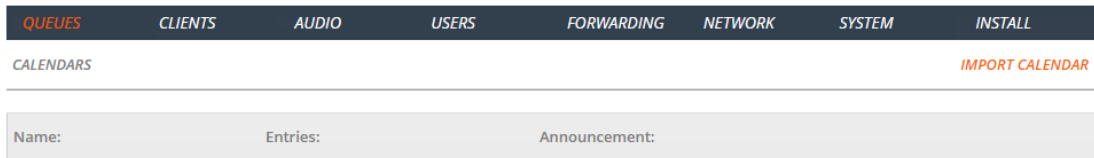


4. The call can only be answered correctly if the agent is either:
 - o Using ZyDesk internal softphone type
 - o Using a correctly mapped PBX phone type, with a correctly and working number, and presence/line state must work correctly

If the installation guide for the system was completely followed, the ZyDesk administrator user will be a valid agent, and will have a valid working internal softphone type.

7.3 How to create an close/open calendar

1. Navigate to Admin Portal / Queues / Calendars
2. Click on “add calendar”



Add Calendar Import Calendar

3. Give the calendar a name

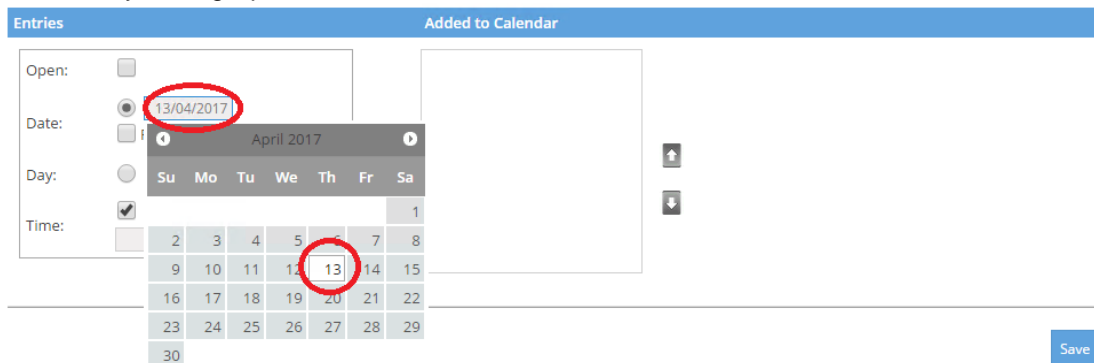


4. Optionally select an “announcement on closure” audio file. This is the announcement played for calls during closing time. If no announcement is selected a general queue announcement can still be associated when using the calendar on a queue. In this case, we have pre-recorded an audio file announcing that the company is closed during Easter, and when it will re-open.



5. You must add at least one entry to the calendar. In this case we will add 3 “extra closed” exceptions, which means that we will un-check the “open” checkbox, and we will add the following dates to the calendar: April 13, 14 and 17.

We start by adding April 13:



After selecting the date (April 13), click on the right arrow, and note that [C] appears to the right. This means that we did not select the “open” checkbox and hence the queue will be

extra closed the selected days.

6. Add April 14 and April 17 the same way. It will now look like:

7. Click save

8. You should see a message in green text, saying that the calendar has been created.

QUEUES CLIENTS AUDIO USERS FORWARDING NETWORK SYSTEM INSTALL

CALENDARS IMPORT CALENDAR

Calendar Eater 2017 successfully created.

Name:	Entries:	Announcement:
Eater 2017	3	

Add Calendar Import Calendar

7.4 How to assign calendars to queues

1. Navigate to Admin Portal / Voice Queues

2. Click on the opening hours ⌚ icon next to the queue you would like to assign the calendar to:

QUEUES CLIENTS AUDIO USERS FORWARDING NETWORK SYSTEM INSTALL

VOICE QUEUES

Display Name:	Name:	Number:	Weight:	Users:	Lang:	
Accounting Voice Queue	Accounting	765432	1	0	en	⌚ ⚙️ 🗑️
Main number voice queue	Main	91361	1	1	en	⌚ ⚙️ 🗑️
Sales voice queue	Sales	1234	1	0	en	⌚ ⚙️ 🗑️

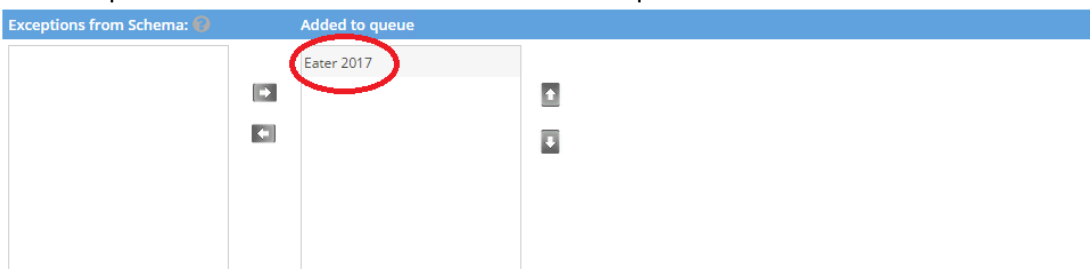
Bulk administration of queue settings

Add Voice Queue

3. Select the name of the exception and click on the right arrow icon.



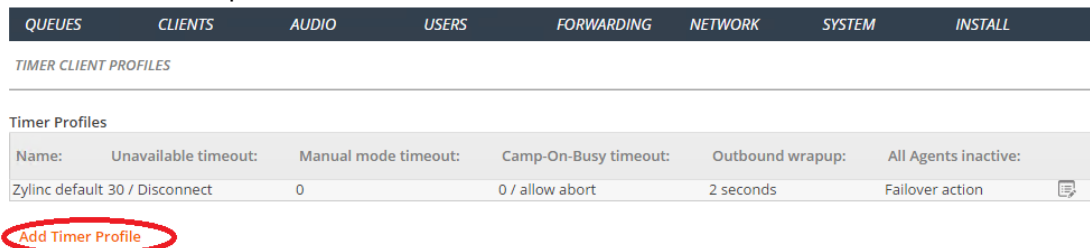
4. The exception should now be visible in the "added to queue" list:



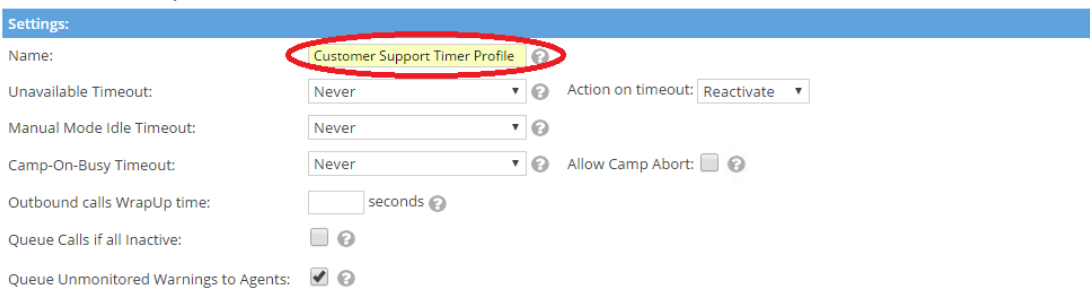
5. Save

7.5 How to create a new timer profile

1. Navigate to Admin Portal / Clients / Timer Profiles
2. Click on "add timer profile"



3. Give the timer profile a name



- You must enter a value into “outbound calls wrapup time” to be able to save the new timer profile

Settings:

Name:

Unavailable Timeout: Action on timeout:

Manual Mode Idle Timeout:

Camp-On-Busy Timeout: Allow Camp Abort:

Outbound calls WrapUp time: seconds

Queue Calls if all Inactive:

Queue Unmonitored Warnings to Agents:

- You can now save the new timer profile

Please refer to the “timer profile” section in this document for more information each available setting.

7.6 How to assign a timer profile to a ZyDesk profile

Timer profiles can be mapped to ZyDesk profiles. This allows you to use different timer settings for different groups of agents.

Timer profiles can also be mapped to web clients or mobile clients.

- Navigate to Admin Portal / Clients / Timer Profiles
- All ZyDesk profiles, as well as web clients and mobile clients are visible. Simply select the relevant timer that each profile should use.

QUEUES CLIENTS AUDIO USERS FORWARDING NETWORK SYSTEM INSTALL

TIMER CLIENT PROFILES

Name:	Unavailable timeout:	Manual mode timeout:	Camp-On-Busy timeout:	Outbound wrapup:	All Agents inactive:
Zylinec default 30 / Disconnect	0	0 / allow abort	2 seconds	Failover action	
Customer Support 0 / Reactivate Timer Profile	0	0 / no abort	5 seconds	Failover action	

[Add Timer Profile](#)

Client Profiles - ZyDesk

Profile Name:	Type:	Timer Profile:
Contact Center 6.0	ContactCenter	Zylinec defau
Service Center 6.0	ServiceCenter	Zylinec defau
Service Center 6.0 Reception	ServiceCenter	Zylinec defau
Attendant Console 6.0	Switch	Customer Support Timer Profile
Attendant Console 6.0 Test Profile	Switch	Zylinec default

[Save](#)

Client Profiles - Other

Profile Name:	Type:	Timer Profile:
ZyDesk Default	-	Zylinec defau
Web Clients	-	Zylinec defau
Mobile Clients	-	Zylinec defau

[Save](#)