

MITEL NETWORKS

# 6140 | Agent Portal

INSTALLATION AND USER GUIDE

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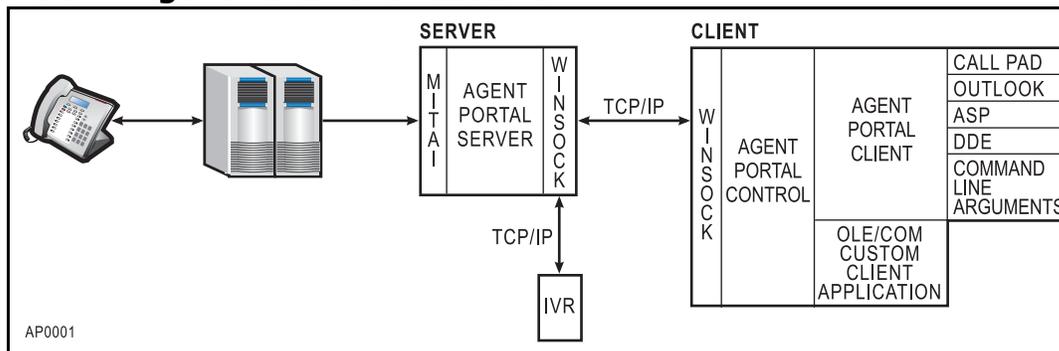


# Introduction

## About 6140 Agent Portal

Mitel Networks™ 6140 Agent Portal allows an agent to receive call information via a number of different applications that can be configured to ‘pop’ or display automatically on any desktop. Agent Portal consists of two components; the Agent Portal Server and a Client. The Client is either the default Client, that is shipped with the product, or a toolkit that can be used to develop a customized application. Agent Portal uses MiTAI software to receive call events sent from the PBX to the Agent Portal Server which then transmits them to the Client via TCP/IP. (See Figure 6-1)

**Figure 6-1 Agent Portal architecture**



## Agent Portal Server

The Agent Portal Server performs the following tasks:

- starts and stops Agent Portal sessions, monitors devices and logs agents in and out of sessions
- receives data from the PBX via MiTAI
- for each call, collects details and sends this data to the agent
- receives login requests from the Client

In addition, the Agent Portal Server can be integrated with a custom Interactive Voice Response (IVR) system to allow data to be transmitted from the IVR to the Agent Portal Server which then transmits it to the Client.

The method used to physically connect the Agent Portal Server to the PBX depends on the PBX model you are using. For more information on the server hardware requirements, refer to “Agent Portal Server requirements” on page 5.

## Client

The client receives call records from the Agent Portal Server, via winsock. The client uses a programmable component, Agent Portal Control, to communicate between the Agent Portal Server and the client. The client interface to Agent Portal Control is either Agent Portal Client, the default interface shipped with the product, or Agent Portal Control, a toolkit that can be used to develop a customized application. For more information on the Agent Portal Control and the default interface, refer to:

- “Agent Portal Client” on page 2
- “Agent Portal Control” on page 2

### Agent Portal Client

The Agent Portal Client is the default client interface that is shipped with Agent Portal. The Agent Portal Client is programmed to integrate and exchange data with the following applications:

- text editor (Call Pad)
- Microsoft Outlook
- any application that supports Active Server Page (ASP) scripts
- any application that can receive call details as command-line arguments
- DDE

### Agent Portal Control

The Agent Portal Control is a toolkit that can be used to develop an application to handle the communication between the Agent Portal Server and the Client applications. It is a programmable OLE Custom control (OCX) program that allows agent applications to interact with the Agent Portal Server. For more information on the fundamentals of the Agent Portal Control components, refer to “Appendix A: Agent Portal Control programmer reference” on page 55.

## Mitel PBX

Agent Portal receives call events from one of the following Mitel PBXs:

- SX-200
- SX-2000
- 3300 ICP

## What this guide contains

This guide is intended to be used to install, configure and administer the Agent Portal system. This guide is not intended to be used by call center agents. For your convenience the pdf file, Agent Procedure.book, has been included on the CD and can be distributed to Agents. This file contains only those procedures used by call center agents.

This guide is organized into the following sections:

- “System requirements” on page 5, details the hardware and software requirements for Agent Portal.
- “Agent Portal Server” on page 9, describes how to install and configure the Agent Portal Server. It also includes some administration procedures.
- “Agent Portal Client” on page 27, describes how to install and configure the Agent Portal Client.
- “Agent procedures for Agent Portal Client” on page 47, provides agent procedures as well as some basic troubleshooting tips.
- “Appendix A: Agent Portal Control programmer reference” on page 55
- “Glossary” on page 69, contains a list of terms used in this guide.



# System requirements

If you are using the default Agent Portal Client and running only Agent Portal software, the following recommended requirements apply. These requirements may change if you are using a customized Client or running additional call center applications. For more information, refer to:

- “Agent Portal Server requirements” on page 5
- “Agent Portal Client workstation requirements” on page 6
- “PBX requirements” on page 6

**NOTE:** Refer to “Connection limitations” on page 7, for information on Agent Portal limitations.

## Agent Portal Server requirements

Before installing the Agent Portal Server, verify that you have satisfied the following recommended server hardware and software requirements.

### Minimum hardware requirements

For optimum performance, the server should be equipped with the following minimum hardware:

- Intel Pentium II 550 MHz CPU
- 256 MB RAM (minimum)
- 200 MB of free space
- CD-ROM drive
- 3.5 inch floppy disk drive
- PS2 or USB mouse and keyboard
- Network Interface Card (NIC)
- Parallel port on server for security access module (SAM)
- Internal MODEM card (optional)
- Appropriate PBX connectivity:
  - SX-200 requires TALK TO CX card
  - SX-2000 requires the appropriate connectivity kit - AFC or Application Service Unit (ApSU)
  - 3300 ICP via TCP/IP

### Minimum software requirements

The following third-party software is required for use with the server:

- Windows 2000 Professional or Windows 2000 Server with Windows 2000 Service Pack 3
- MODEM card driver, if card is installed
- Microsoft Networking (TCP/IP)
- Adobe Acrobat Reader (found on the Mitel Networks 6140 Agent Portal Installation CD)
- Driver software for PBX link interface cards:
  - SX-200 requires MiTAI runtime version 8.0.11
  - SX-2000 requires MiTAI runtime version 8.0.11
  - 3300 ICP requires MiTAI runtime version 11.0.1 or higher

## Agent Portal Client workstation requirements

Before installing the Agent Portal Client, verify that you have satisfied the following recommended client workstation hardware and software requirements.

### Minimum hardware requirements

For optimum performance, each customer-supplied client workstation should be equipped with the following hardware:

- Intel Pentium 200 MHz CPU
- 64 MB RAM
- 150 MB free disk space
- SVGA graphics supporting a resolution of at least 800 x 600 pixels (optimum resolution is 1024 x 768)
- Network Interface Card (NIC)
- PS2 or USB mouse and keyboard

### Minimum software requirements

Call information is delivered to a set of third party applications including Microsoft Outlook. Access is required to any third party applications that you have specified during the setup procedures.

In addition, the following software is required for use with the Client:

- Internet Explorer version 5.5 with Service Pack 2
- Microsoft Outlook 2000
- TCP/IP protocol enabled
- Adobe Acrobat Reader

## PBX requirements

The following resources are required for use with the Mitel PBX:

- Appropriate PBX software:
  - SX-200 requires LW18
  - SX-2000 requires LW 31 (T stream)
  - 3300 ICP requires 3.3 (will support MiTAI 11.0)
- Appropriate MiTAI software
  - SX-200 and SX-2000 with AFC requires version 8.0.11
  - 3300 ICP and SX-200 with ApSU requires 11.0.1
- Appropriate licensing
  - All PBXs must be licensed to use MiTAI
  - Verify that you have enough monitors to monitor your agents plus device extensions and trunks
- Class of Service (CoS) options enabled in the SX2000 and 3300 ICP:
  - HCI/CTI/TAPI Call Control must be set to Yes
  - HCI/CTI/TAPI Monitor Allowed must be set to Yes

## Connection limitations

The Agent Portal Server component is intended for use on Windows 2000.

- Use Windows 2000 Server if:
  - 10 or more 6140 clients will be connected to the 6140 Server.
  - MiTAI Server is used (PBX connected by TalkTo, or AFC card)
- Use Windows 2000 Professional if:
  - Less than ten 6140 clients will be connected to the 6140 Server
  - MiTAI Remote is used (3300, or SX-2000 connected by APSU)

## 8 System requirements

# Agent Portal Server

Before you can begin using Agent Portal, you must install and configure the Agent Portal Server software using the following procedures, in the order listed.

- “Installing the security access module” on page 9
- “Installing 6140 Agent Portal Server software” on page 10
- “Accessing the Agent Portal Server” on page 17
- “Configuring the Agent Portal Server” on page 19

Once the software is configured, you can start using it. For more information, refer to “Using the 6140 Agent Portal Server” on page 23.

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**NOTE: MATAI must be installed and running before you install Agent Portal.**

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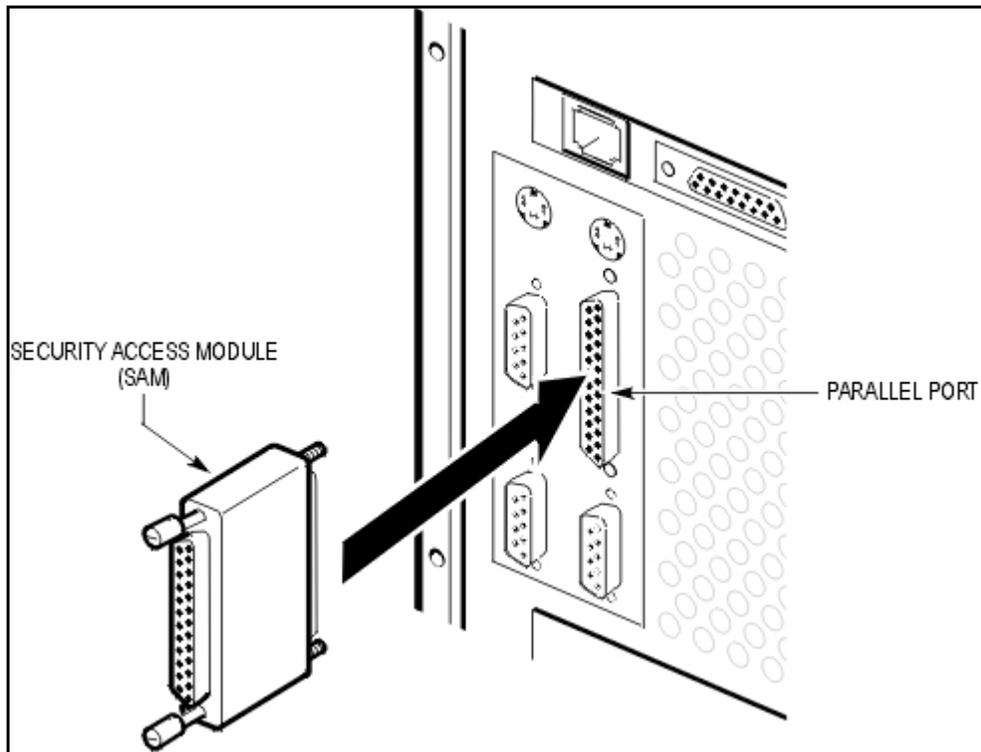
## Installing the security access module

The security access module (SAM) provides the Agent Portal with a System Identifier (ID) code. This ID code, in combination with a password, allows you to enable the licenses that you have purchased. The SAM must be installed or Agent Portal will not function.

Attach the SAM to the server’s parallel port using the following procedure:

1. Insert the SAM into the server’s parallel port. (See Figure 4-1)
2. Tighten the screws on either side of the SAM.

**Figure 4-1 Installation of SAM**

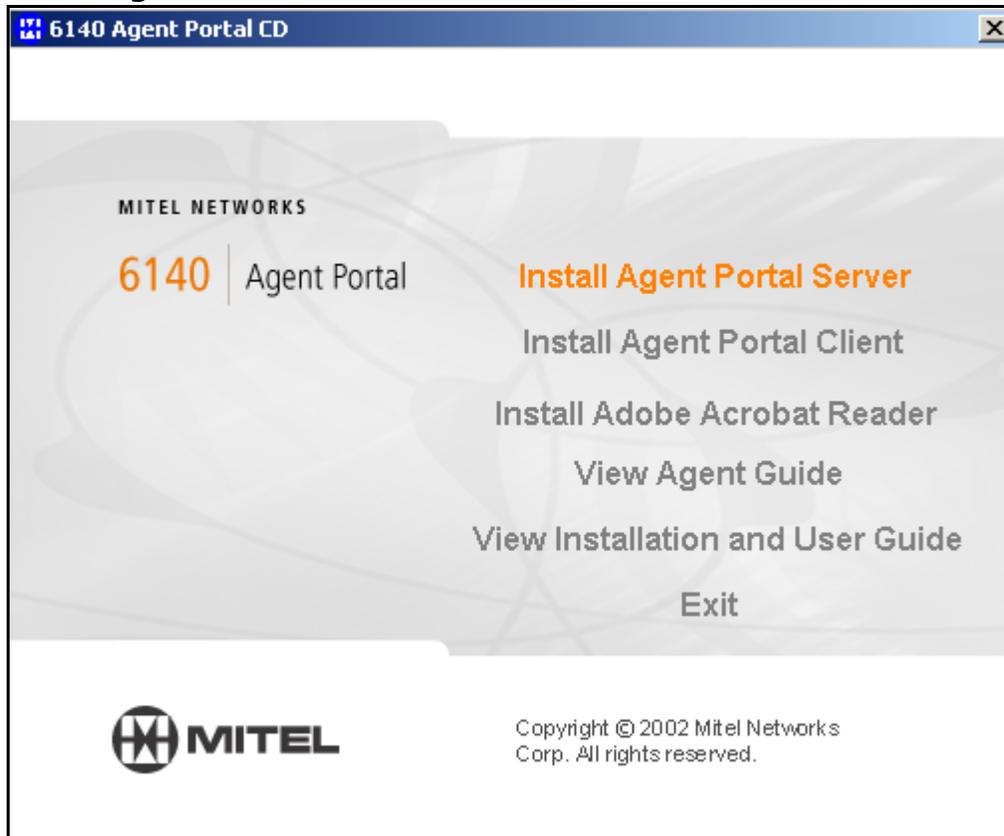


## Installing 6140 Agent Portal Server software

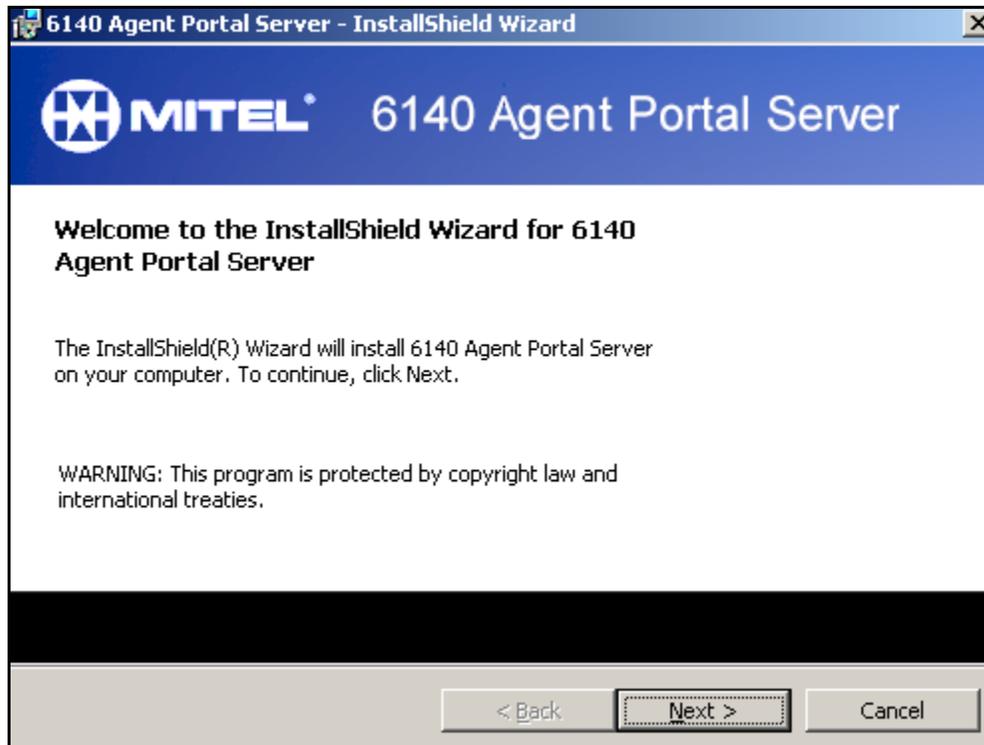
Before installing Agent Portal Server, verify that you have satisfied the recommended hardware and software requirements. For more information, refer to “System requirements” on page 5. Use the following procedure to install Agent Portal Server.

1. Verify that MATAI is installed and running before you install Agent Portal.
2. Insert the **Mitel Networks™ 6140 Agent Portal CD** into the drive.  
The Agent Portal Installation screen is displayed. (See Figure 4-2)

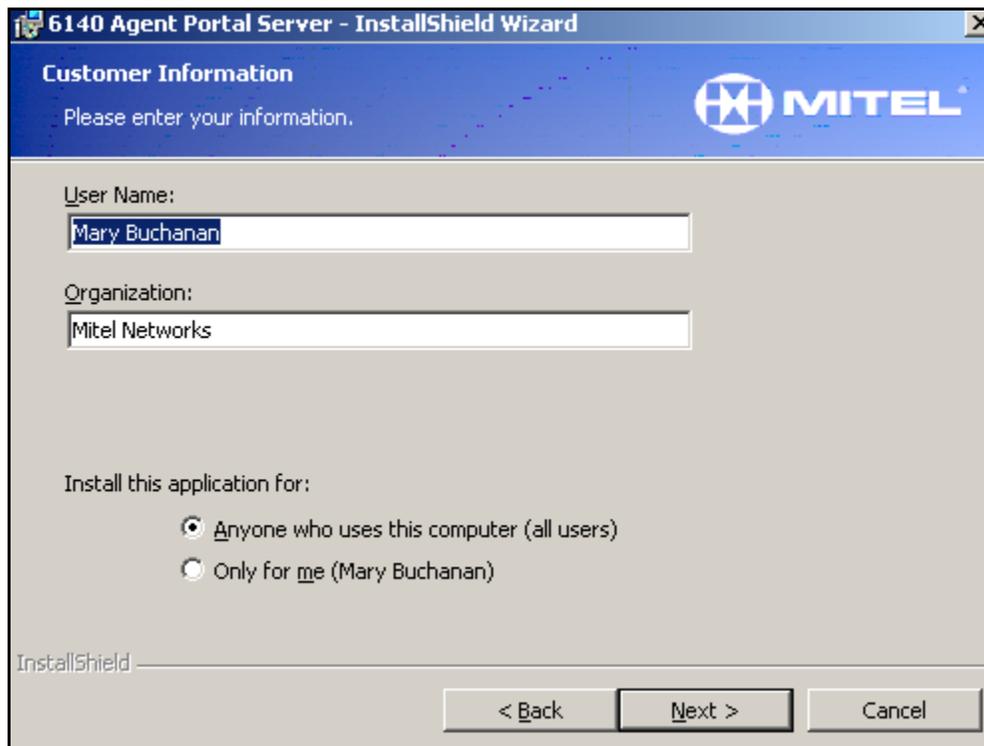
**Figure 4-2 Agent Portal Installation screen**



3. Select the **Install Agent Portal Server** option.  
The Install Wizard is displayed. (See Figure 4-3)

**Figure 4-3 Install Wizard screen**

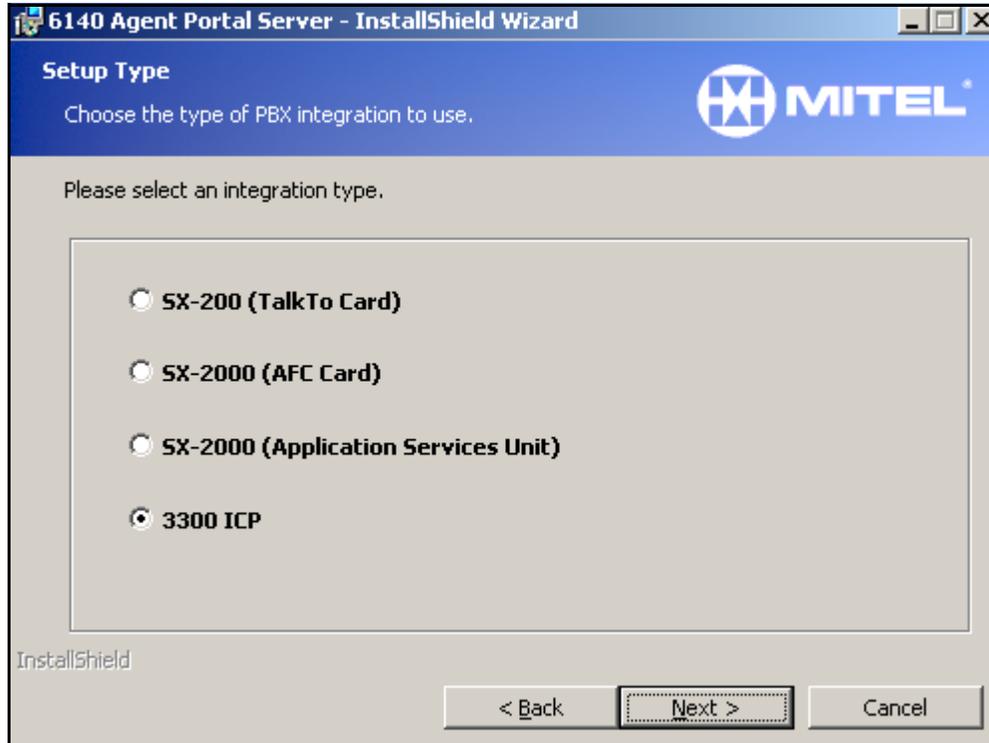
4. Click **Next**.  
The Customer Information window is displayed. (See Figure 4-4)

**Figure 4-4 Customer Information window**

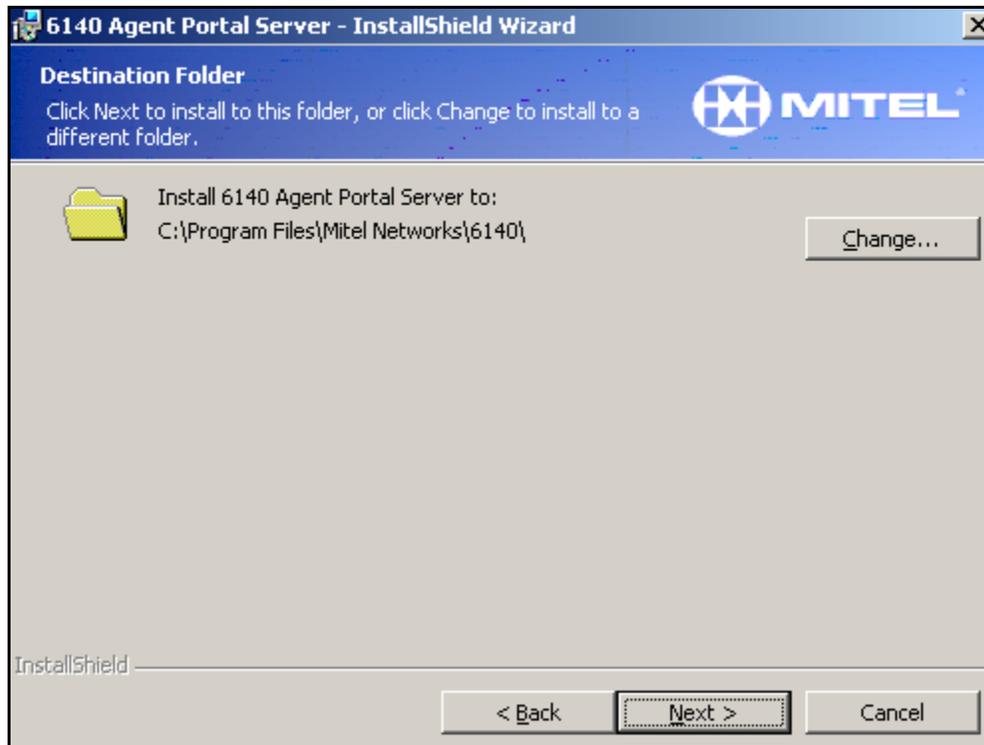
## 12 Agent Portal Server

5. Enter your name and organization.
6. In the 'Install this application for' field, select the appropriate option.
7. Select **Next**.  
The Setup Type window is displayed. (See Figure 4-5)

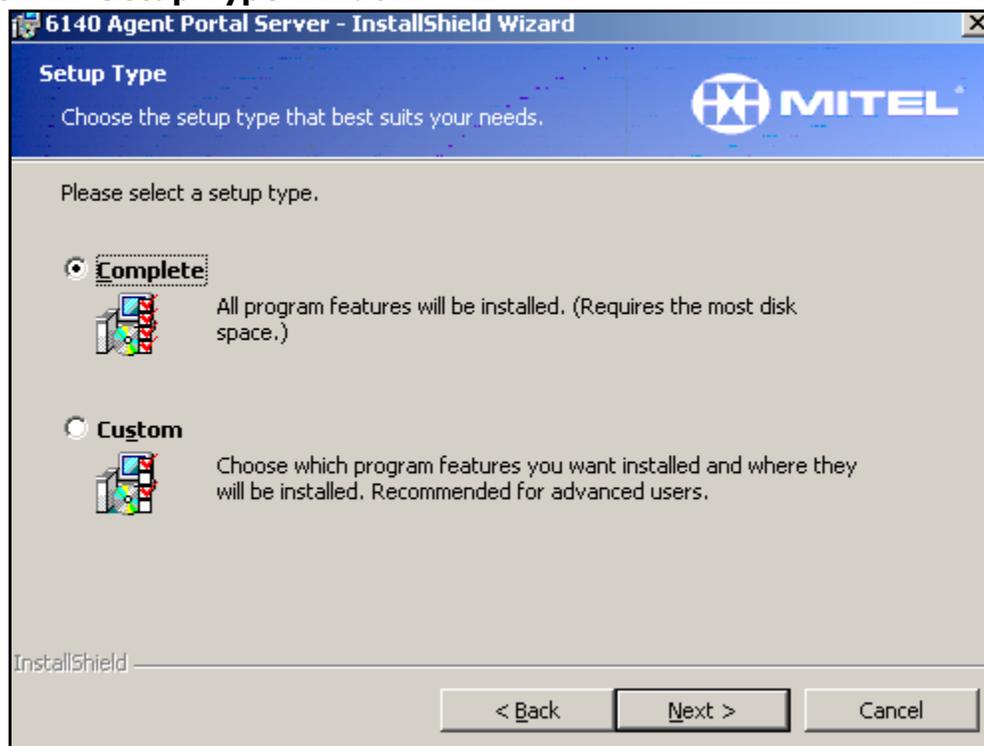
**Figure 4-5 Setup Type window**



8. Select the PBX type to which the Agent Portal Server will integrate.  
The Destination folder window is displayed. (See Figure 4-6)

**Figure 4-6 Destination folder window**

9. Click **Next**.  
The Setup Type window is displayed. (See Figure 4-7)

**Figure 4-7 Setup Type window**

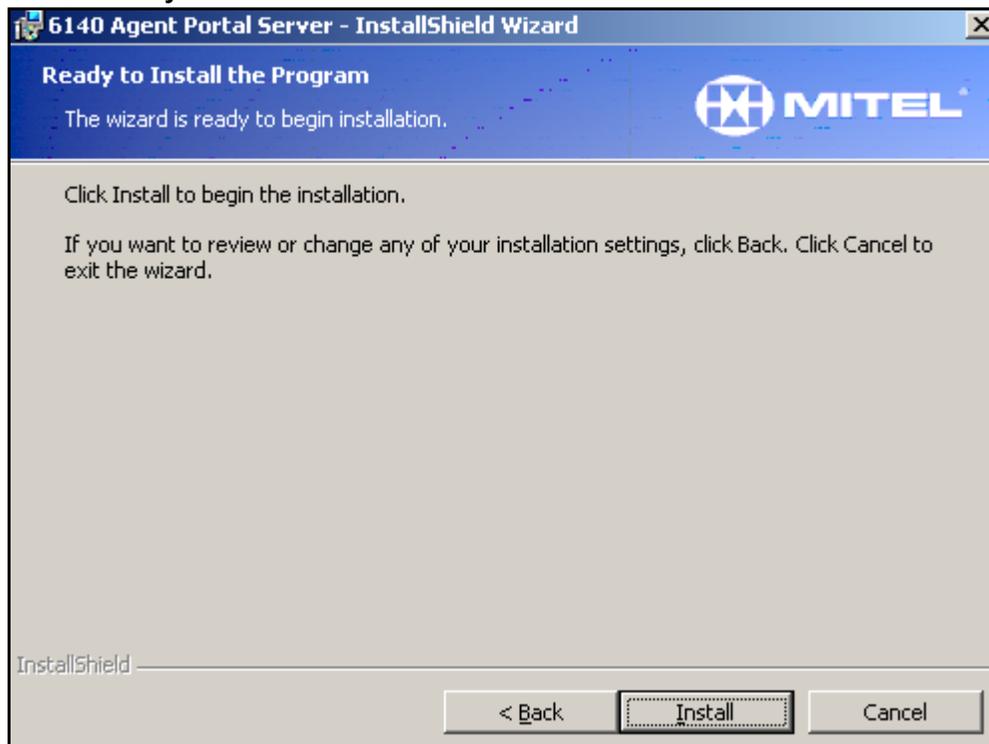
10. Select one of the following setup types:
  - Complete. For more information, refer to “Complete Installation of Server Software” on page 14.
  - Custom. For more information, refer to “Custom Installation of Server Software” on page 15.

## Complete Installation of Server Software

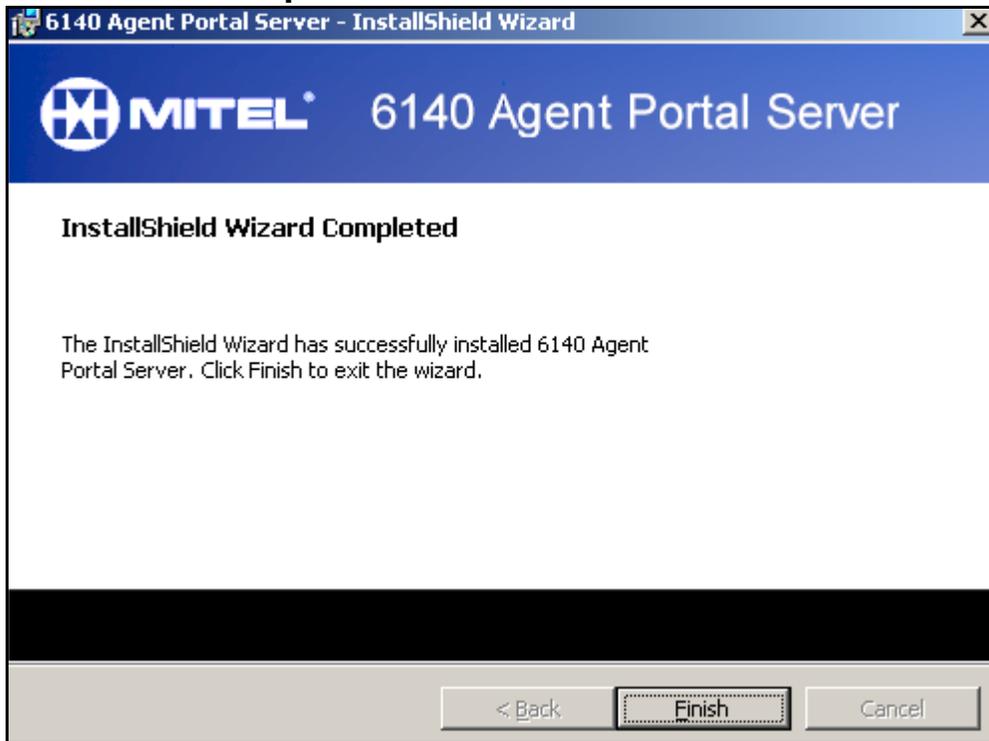
A Complete installation installs the Server software as well as the MITAI support files. Use the following procedure to perform a complete installation.

1. Select **Complete**.
2. Select **Next**.  
The ‘Ready to Install the Program’ window is displayed.

**Figure 4-8 Ready to Install window**



3. Click **Install**.  
The software is installed and the Install Complete window is displayed. (See Figure 4-9)

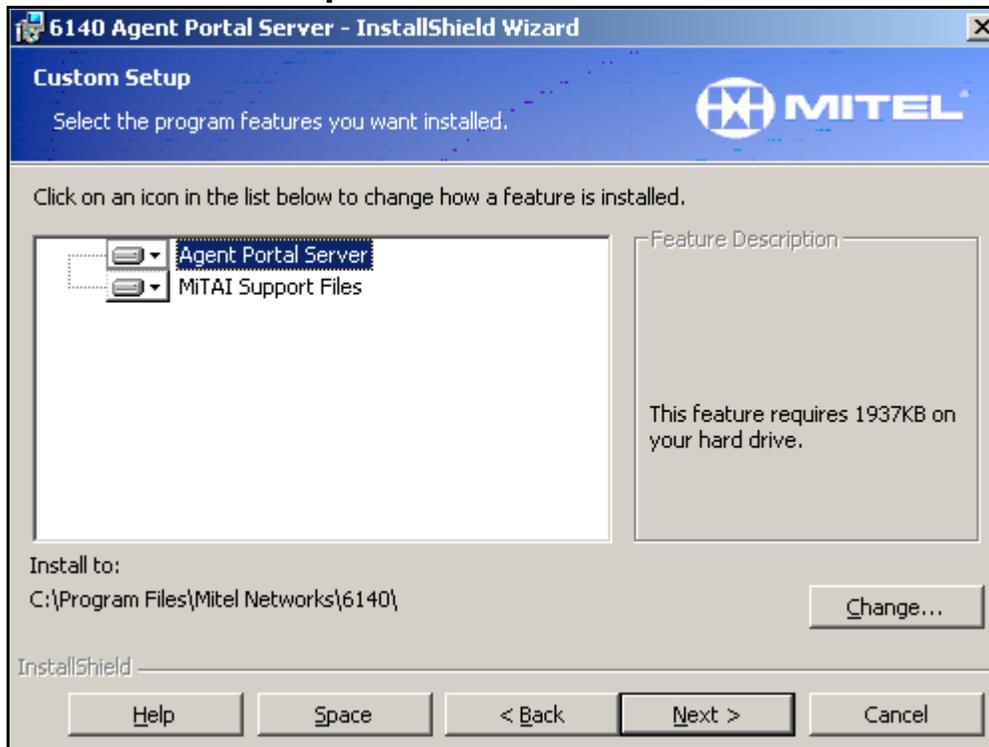
**Figure 4-9 Install complete window**

4. Click **Finish**.  
A dialog box is displayed indicating that you must restart your system.
5. Restart your system for the changes to take effect.

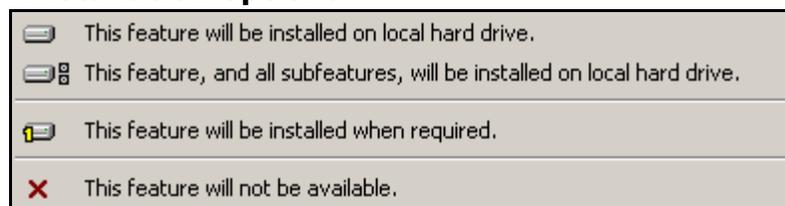
## Custom Installation of Server Software

A custom installation allows you to select which program features to install. You have a choice of installing the server software and the MITAI software.

1. Select **Custom**.
2. Select **Next**.  
The Custom Setup window is displayed. (See Figure 4-10)

**Figure 4-10 Custom setup window**

3. Verify the storage requirements of each feature by selecting the feature. The storage requirements are displayed in the right pane.
4. Select the down arrow beside the feature you wish to install. A set of install options is displayed. (See Figure 4-11)

**Figure 4-11 Installation options**

5. For each feature, select the appropriate install option.
6. If necessary, change the storage location of the feature by selecting the feature and selecting **Change**.  
The 'Change Current Destination' folder window is displayed.
7. Browse to the appropriate location and click **OK** to confirm the folder name where you wish to store the feature.
8. Select **Next**.  
The 'Ready to Install the Program' window is displayed.
9. Select **Install**.  
The 'InstallShield Wizard Complete' window is displayed.
10. Select **Finish**.  
The features you selected are installed on your workstation. A dialog box is displayed indicating that you must restart your system.
11. Restart your system for the configuration changes to take place.

## Accessing the Agent Portal Server

When you restart your system, the Agent Portal software is automatically started and the icon is minimized in your system tray. If you exit from the Agent Portal server interface, the software must be restarted.

Use the following procedure to access the Agent Portal Server interface:

1. From the Start menu, select Program Files/Mitel Networks/6140/Server.  
The server icon is minimized in your system tray. (See Figure 4-12)

**Figure 4-12 Agent Portal Server icon minimized**



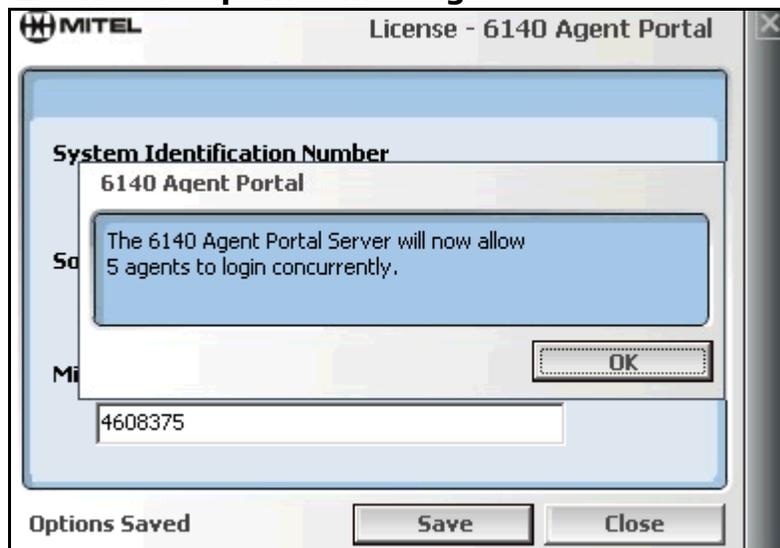
2. When the icon is blue, double click on the icon in the system tray, to display the interface. There is a delay while the server initializes the connection to the Mitel PBX; the red icon turns blue once the connection is established.  
If this is the first time you have accessed Agent Portal after installing it, the Invalid password window is displayed. (See Figure 4-13)  
If this is not the first time you have accessed Agent Portal, go to step 8.

**Figure 4-13 Invalid password window**



3. Click **OK** to accept this message.  
In the License window, the System Identification number is updated automatically from the security access module (SAM) that is plugged into the parallel port of the Agent Portal Server.
4. Enter the number of agent licenses you have purchased, using the arrow keys or by typing it.
5. Enter the Mitel-supplied password in the Mitel Options Password field.
6. Select **Save**.  
An acceptance message is displayed. (See Figure 4-14)

**Figure 4-14 License acceptance message**



7. Select **OK**. As soon as this connection is established, the interface is displayed.
8. You may select **Close** or click the Windows Close button to minimize the interface. The system continues running and the agent connections are not affected. (See Figure 4-15)

**Figure 4-15 Agent Portal Server interface**



**Caution:** Do not select Exit. If you select Exit, the Agent Portal system is shut down and agents are disconnected from their connections.

# Configuring the Agent Portal Server

You use the Agent Portal Server to monitor devices, enable event logging to files and log agents out of the system. You configure the set up for these functions using the Agents, Monitors and Settings options in the Agent Portal Server interface. This configuration information is stored in the APS.ini file.

Configure the Agent Portal Server using the following procedures:

- “Configuring PBX type” on page 19
- “Configuring connection details” on page 19
- “Enabling system logging” on page 19
- “Enabling monitoring for a device” on page 21

## Configuring PBX type

Agent Portal receives calls from a Mitel Networks™ SX-2000, 3300 ICP or SX-200. The system default PBX type is SX-2000/3300. You must identify which Mitel PBX your system uses. Use the following procedure to specify your PBX:

1. From the Agent Portal Server interface, select **Settings**.  
The Settings window is displayed. (See Figure 4-16)
2. In the PBX Type pane, select SX-2000/3300 ICP or SX-200.
3. Select **Save**.

## Configuring connection details

Some default connection settings have been pre-configured on your system. However, it may be necessary to re-configure these settings for your particular system.

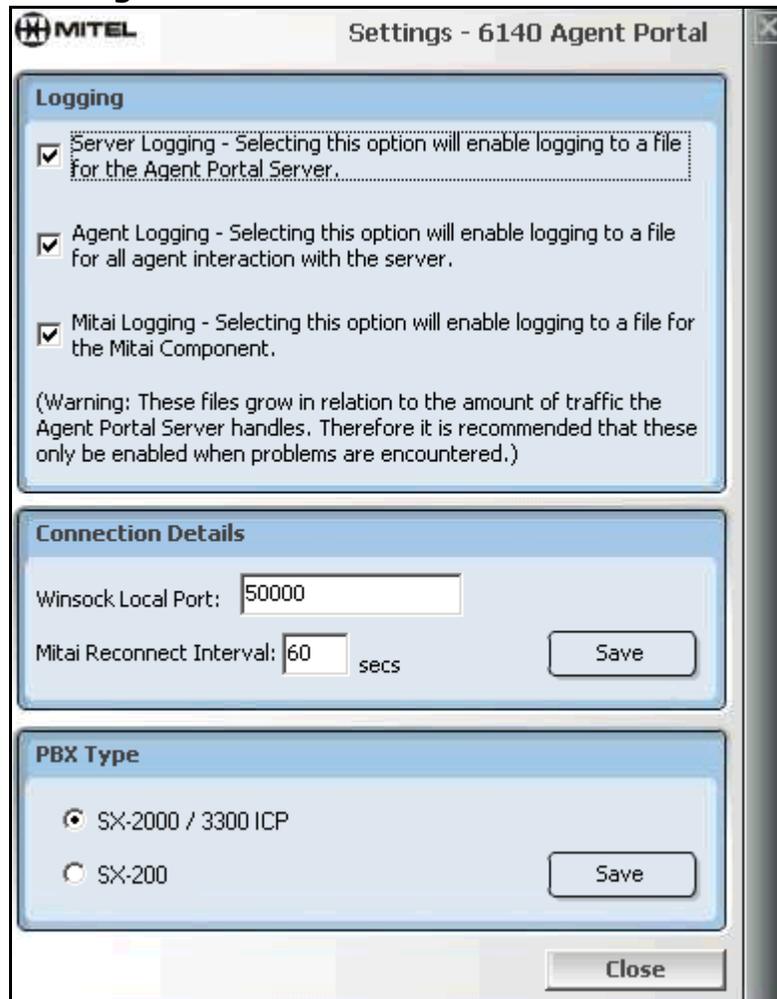
Use the following procedure to your connection details:

1. From the Agent Portal Server interface, select **Settings**.  
The Settings window is displayed. (See Figure 4-16)
2. In the ‘Winsock Local Port’ field, enter the local port number on the Agent Portal Server.  
This is the port to which the Agent Portal Client connects. The default setting for this port is 50000.
3. In the ‘MiTAI Reconnect Interval’ field, enter the number of seconds.  
This is the time interval between when the MiTAI connection to the PBX is broken and when the system attempts to reconnect. The default re-connection interval is 30 seconds.
4. Select **Save**.

## Enabling system logging

System logging is set to disabled when you install Agent Portal. You can enable logging for the Agent Portal Server and client as well as logging for the MiTAI component on the server. Use the following procedure to specify the logging required for your system:

1. From the Agent Portal Server interface, select **Settings**.  
The Settings window is displayed. (See Figure 4-16)

**Figure 4-16 Settings window**

2. Select the type of logging you wish to enable by selecting one of the following options:
  - Server Logging: logs all the Agent Portal Server actions. These log files are stored in c:/Program Files/Mitel Networks/6140/Server/Logs/Server.
  - Agent Logging: logs all the interaction between the Agent Portal Client and Server. These log files are stored in c:/Program Files/Mitel Networks/6140/Server/Logs/Agent.
  - Mitai Logging: logs all MiTAI server actions. These log files are stored in c:/Program Files/Mitel Networks/6140/Server/Logs/MiTAI.

When you select one of these options, the logging is immediately enabled.

**NOTE:** When the logging option is on, large amounts of information is collected. To reduce unnecessary storage on your hard drive, set the logging option to 'off' unless you require the logs for system debugging purposes.

## Enabling monitoring for a device

The Device Monitors window displays the extensions or trunks that route external calls through the device types such as IVRs or Voice Mail. You also use this window to start and stop the monitoring of extensions and trunks. Use the following procedure to initially configure monitoring for devices or to specify an additional device for monitoring:

1. In the Agent Portal Server interface, select **Monitors**.  
The Device Monitors window is displayed. (See Figure 4-17)

**Figure 4-17 Device Monitors window**

MITEL Device Monitors - 6140 Agent Portal

Enable Monitors For Devices (ie. IVR, Voicemail, etc.)

Monitor	Type
▶ 5005	EXTENSION

New Delete

Monitor: 5005

Monitor Type: EXTENSION Save

Stop Close

2. Verify that the option, 'Enable Monitors for Devices', is enabled.
  - If the calls do not go through a device (for example a voicemail or IVR system), the option must be unchecked. This disables all the fields in the Device Monitors window and you are finished.
  - If the calls do go through a device, the option must be checked. Continue to step 3.
3. Stop monitoring if necessary:
  - If you have previously configured monitoring, select **Stop** to stop the monitoring of all devices.
  - If you have not previously configured monitoring, continue to step 4.
4. Select the action you wish to perform:
  - If you wish to edit an existing monitor, select the monitor.
  - If you wish to add a monitor, select **New** in the upper pane.  
The fields in the lower pane are enabled. If you selected New, the Monitor field is cleared.
5. In the 'Monitor' field, enter the extension or trunk number that you wish to monitor.
6. In the 'Monitor Type' field, select the appropriate type.

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- Select Trunk if the device uses trunks.
- Select Extension if the device uses extensions.

You can have a combination of Monitor Types displayed in this window.

7. Select **Save**.
  8. Repeat steps 3 through 7 for each device you wish to monitor.
  9. Select **Start** to restart device monitoring for the system.
- All the devices listed in this window are currently being monitored.

## Using the 6140 Agent Portal Server

You use the Agent Portal Server to perform the following procedures:

- “Rebooting the Agent Portal system” on page 23
- “Updating license information” on page 24
- “Managing logged-in agents” on page 24

### Rebooting the Agent Portal system

If it is necessary to reboot the system, use the following procedure:

1. Notify agents that the Agent Portal system is shutting down.
2. In the Agent Portal Server interface, select **Exit**.  
Agents are disconnected from the Agent Portal system but are not disconnected from their calls. An error message is displayed in the Agent Portal Server interface. (See Figure 4-18)

**Figure 4-18 Error message**



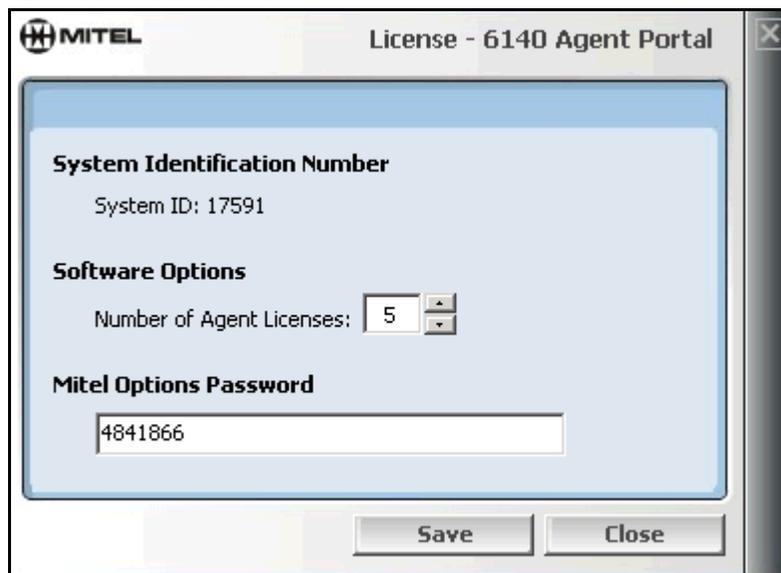
3. When you have completed your required maintenance, start the Agent Portal Server from the Start menu by selecting Programs/Mitel Networks/6140/Agent Portal Server.  
There is a delay while the server initializes the connection to the Mitel PBX. As soon as this connection is established, the interface is displayed and the system is running.
4. Notify the agents that the system is running and they must now login to Agent Portal system  
When you restart the system, the agents are not automatically logged in to the client.

## Updating license information

The current Agent Portal Client licenses were enabled the first time you started your system. The License window allows you to enable any additional licenses that you have purchased. If you have increased the number of licenses for Agent Portal, use the following procedure to update the license information.

1. From the Agent Portal Server interface, select **License**.  
The License window is displayed. (See Figure 4-19) The System Identification number is displayed automatically.
2. In the field, 'Number of Agent Licenses', use the arrow keys to select your total number of licenses.
3. In the field, 'Mitel Options Password', enter the password that was provided with your new licenses.
4. Select **Save**.  
The new licenses are enabled.

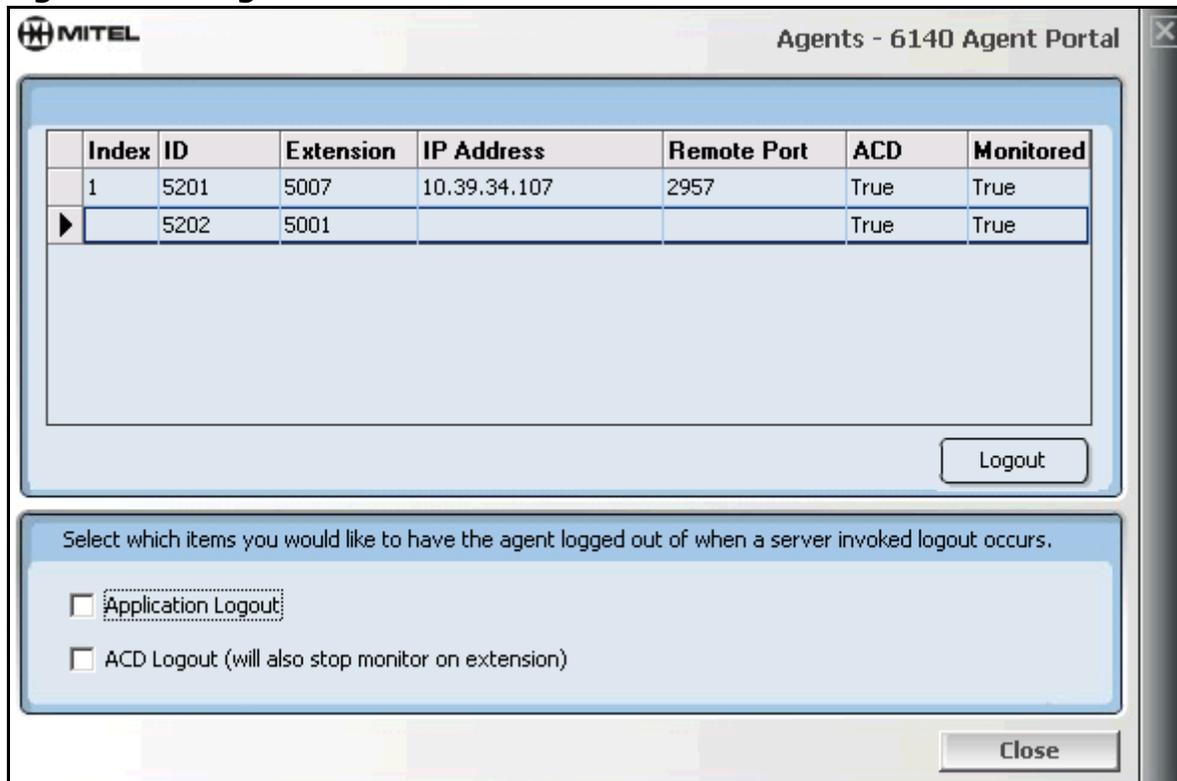
**Figure 4-19 License window**



## Managing logged-in agents

The Agents option in the Agent Portal Server interface allows you to view the agents that are currently logged in to the system.

1. In the Agent Portal Server interface, select **Agents**.  
The Agents window displays connection information for agents. (See Figure 4-20)

**Figure 4-20 Agents window**

In this screen example, the first entry identifies an agent logging in through the Agent Portal Client interface. The second entry identifies an agent that has logged into ACD through their telephone set, but not through the Agent Portal Client interface.

Field	Definition
<b>Index</b>	a unique number assigned by the system to each agent connection
<b>ID</b>	the agent's ID number
<b>Extension</b>	the agent's telephone number
<b>IP address</b>	the ip address of the agent's workstation
<b>Remote Port</b>	the remote client's winsock port
<b>Phone</b>	identifies if the agent's phone is connected. A value of true indicates a good connection. A value of false indicates a problem with the connection.
<b>Monitor</b>	identifies if the connection is being monitored. A value of true indicates a good connection. A value of false indicates a problem with the connection.

2. Select the actions in the bottom pane by clicking in the appropriate box:
  - If you wish to log the agent out of the Agent Portal system but allow them to remain logged into the Automatic Call Distribution (ACD), select **Application Logout** only.
  - If you wish to log the agent out of the system and log them out of the ACD, select both **Application Logout** and **ACD Logout**.

Note: If you select ACD Logout and not Application Logout, the agent will be logged out of the ACD but the Agent Portal client remains connected.

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3. Select the agent you wish to logout.
4. Select **Logout**.  
The display associated with that agent is erased from the Agents window.
5. Select **Close** to close this window.  
When you select Exit in the Agent Portal Server interface, your selections will apply to all agents.

# Agent Portal Client

Before you can begin using Agent Portal, you must install and configure the Agent Portal client software using the following procedures, in the order listed.

- “Installing 6140 Agent Portal Client software” on page 27
- “Accessing Agent Portal Client” on page 32
- “Configuring Agent Portal Client” on page 32

Once the software is configured, the agents can start using it. For more information on procedures for using Agent Portal Client, refer to “Agent procedures for Agent Portal Client” on page 47.

## Installing 6140 Agent Portal Client software

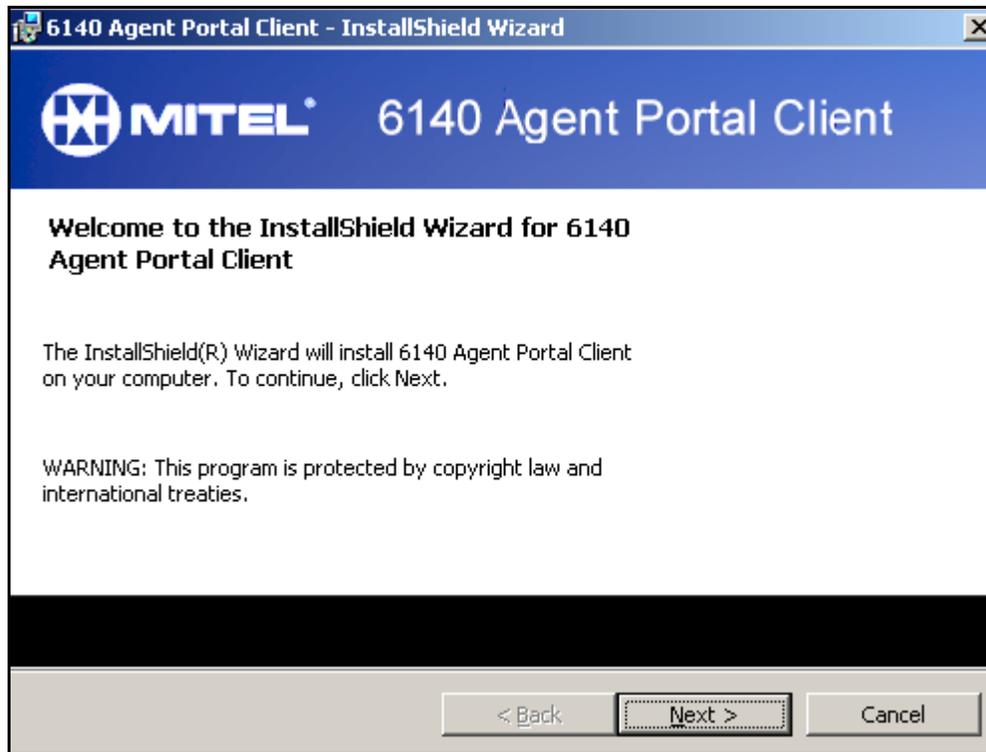
1. Verify that MATAI is installed and running before you install Agent Portal.
2. Insert the **Mitel Networks™ 6140 Agent Portal CD** into the drive.  
The Agent Portal Installation screen is displayed. (See Figure 4-1)

**Figure 4-1 Agent Portal Installation screen**



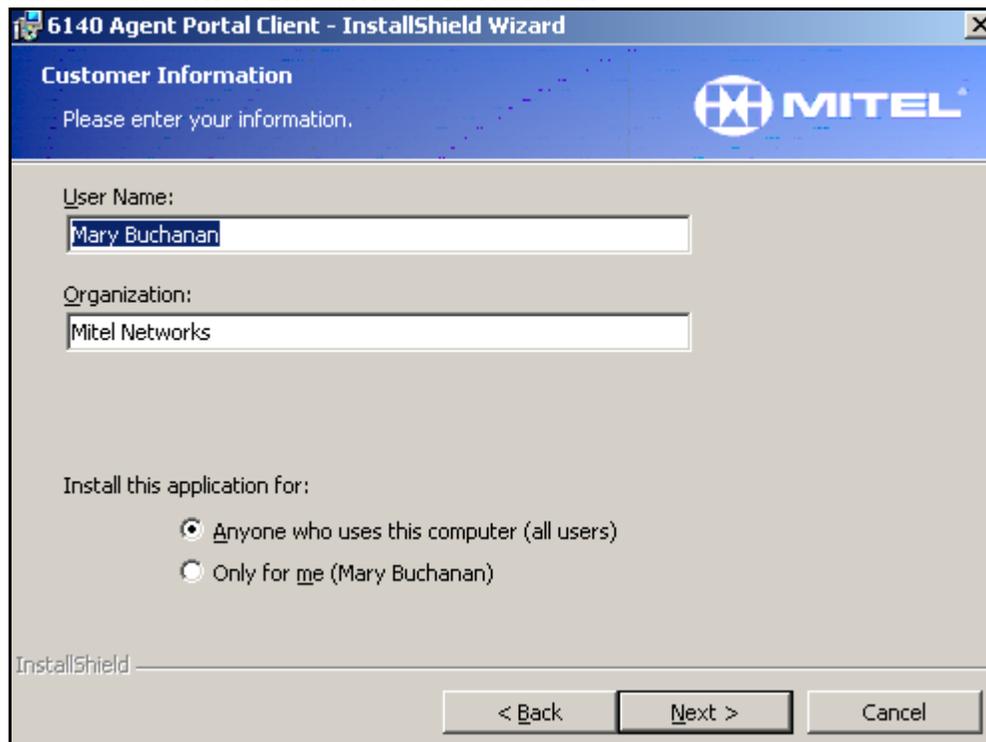
3. Select the **Install Agent Portal Client** option.  
The Install Shield Wizard is launched. (See Figure 4-2)

**Figure 4-2 Install Shield Wizard**



4. Select **Next**.  
The Customer Information window is displayed. (See Figure 4-3)

**Figure 4-3 Customer Information window**



5. Enter your name and organization.
6. In the 'Install this application for' field, select the appropriate option.
7. Select **Next**.  
The Setup Type window is displayed. (See Figure 4-4)

**Figure 4-4 Setup Type window**



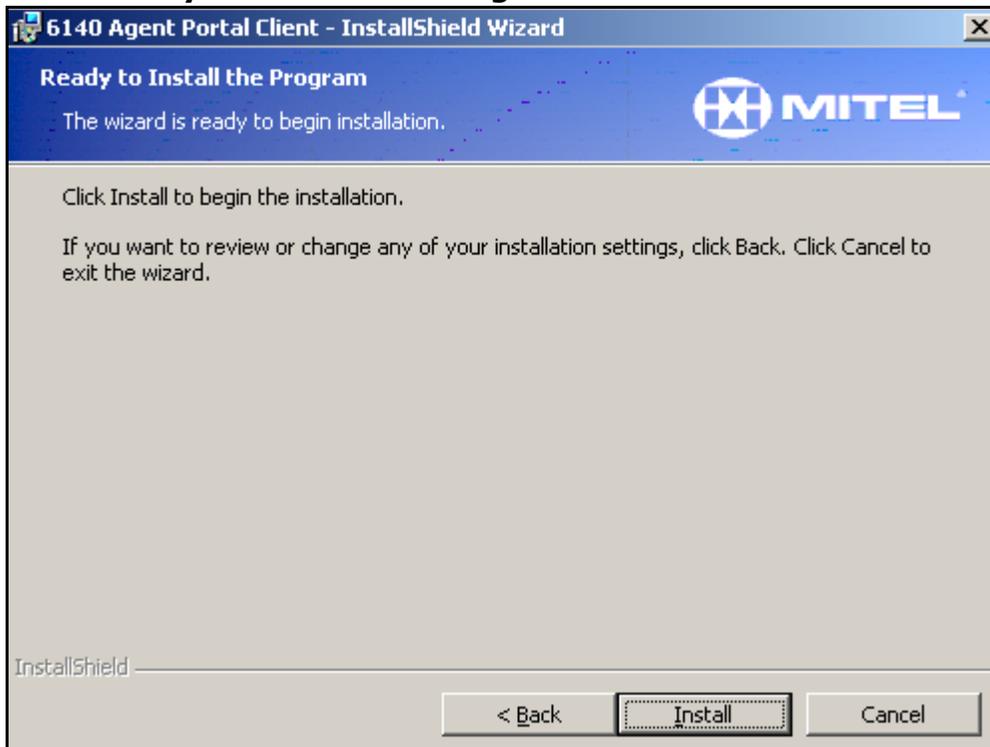
8. Select one of the following setup types:
  - Complete. For more information, refer to “Complete installation of client software” on page 29.
  - Custom. For more information, refer to “Custom installation of client software” on page 30.

## Complete installation of client software

A Complete installation installs the Client software as well as the application demonstrations. Use the following procedure to perform a complete installation.

1. Select **Complete**.
2. Select **Next**.  
The Ready to Install the Program window is displayed. (See Figure 4-5)

**Figure 4-5 Ready to Install the Program window**

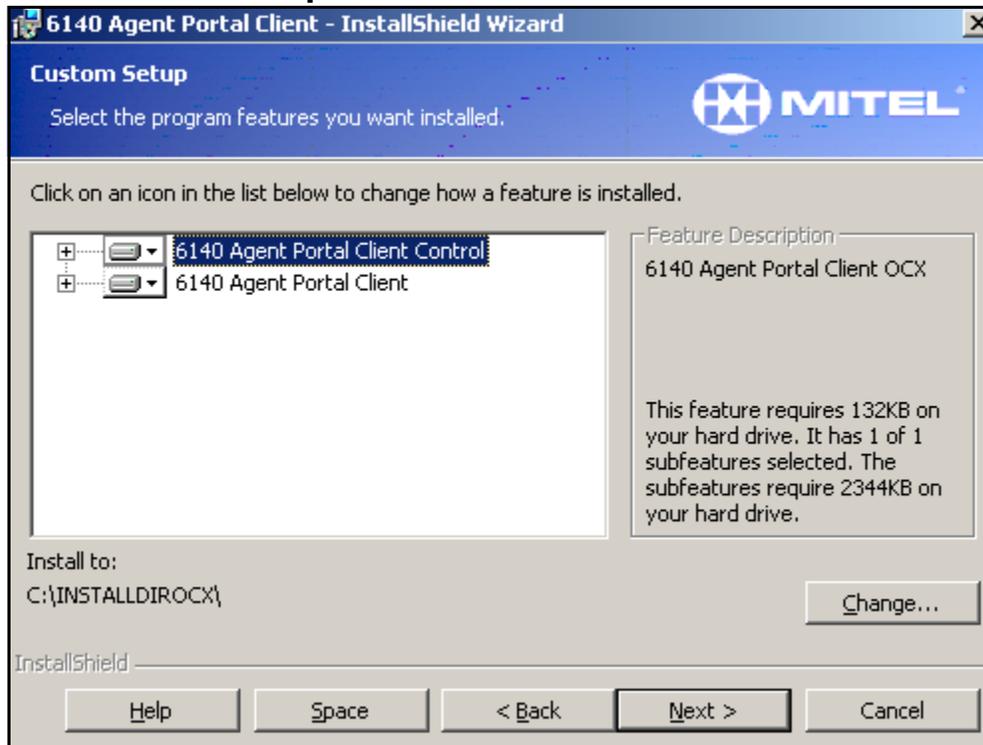


3. Select **Install**.  
The InstallShield Wizard Complete window is displayed.
4. Select **Finish**.  
The Agent Portal Client and Server software is installed on your workstation.

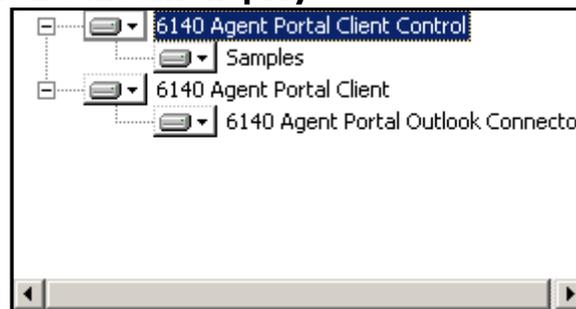
## Custom installation of client software

A Custom installation allows you to select which program features to install as well as the location in which to install these features. It is recommended that you perform a Custom installation if you wish to use the Agent Portal Control OCX to create a customized application. Use the following procedure to perform a custom installation.

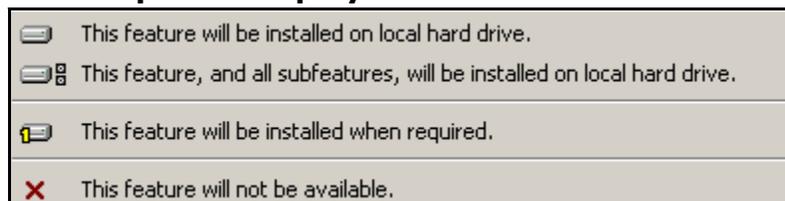
1. Select **Custom**.
2. Select **Next**.  
The Custom Setup window is displayed. (See Figure 4-6)

**Figure 4-6 Custom Setup window**

3. Click on the plus signs (+) beside each feature.  
The displays all the subfeatures for each feature.

**Figure 4-7 Subfeature install display**

4. Verify the storage requirements of each feature by selecting the feature.  
The storage requirements are displayed in the right pane.
5. Select the down arrow beside the feature and subfeatures you wish to install.  
A set of install options is displayed. (See Figure 4-8)

**Figure 4-8 Install options display**

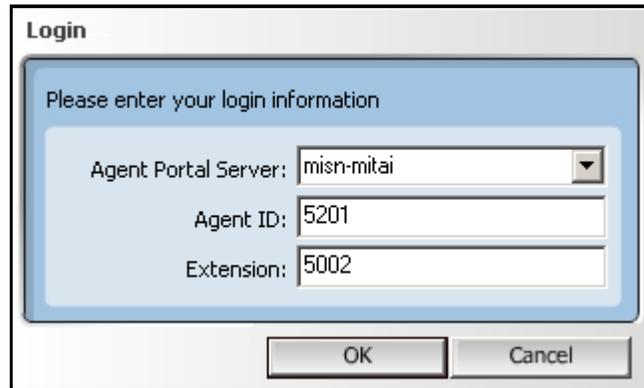
6. For each feature, select the appropriate install option.  
You must install the Agent Portal Outlook Connector if you wish use the Microsoft Outlook Journal and Contact window popups.  
An icon, indicating your selection, is displayed beside the feature.
7. If necessary change the storage location of the feature by selecting the feature and selecting **Change**.  
The Change Current Destination Folder window is displayed.
8. Browse to the appropriate location and click **OK** to confirm the folder name where you wish to store the feature.
9. Select **Next**.  
The Ready to Install the Program window is displayed. (See Figure 4-5)
10. Select Install.  
The InstallShield Wizard Complete window is displayed.
11. Select **Finish**.  
The features you selected are installed on your workstation.

## Accessing Agent Portal Client

Use the following procedure to log in to the Agent Portal Client interface:

1. From the Programs menu, select Mitel Networks, 6140/Agent Portal Client.  
The Agent Portal icon is minimized on your desktop. The icon is red before you log in to the system.
2. Select the Agent Portal icon.  
The Agent Portal Client interface is displayed.
3. Select the 'Login' option.  
The Login window is displayed. (See Figure 4-9)

**Figure 4-9 Login window**



4. In the Login window, enter the ip address or server name in the 'Agent Portal Server' field.
5. Enter your agent ID and your extension number.
6. Select **OK**.
7. The Status window displays the message 'Login Successful'.

## Configuring Agent Portal Client

Call information can be delivered to an agent via a number of different applications using the default client interface, Agent Portal Client. These applications can be configured to 'pop' or display automatically on any desktop. Using Agent Portal Client, you have the option of launching one of the following when a call is received:

- Agent Portal Call Pad: a customized text editor
- Microsoft Outlook
- any application that supports Active Server Page (ASP) scripts
- any application that can receive call details as command-line arguments
- DDE

The Settings window allows you to specify how and where call information is delivered to an agent. This configuration must be performed on each agent's workstation. A set of demonstrations that illustrate the use of these 'pops' are included with Agent Portal. For information on these demonstrations, refer to "Application demonstrations" on page 42.

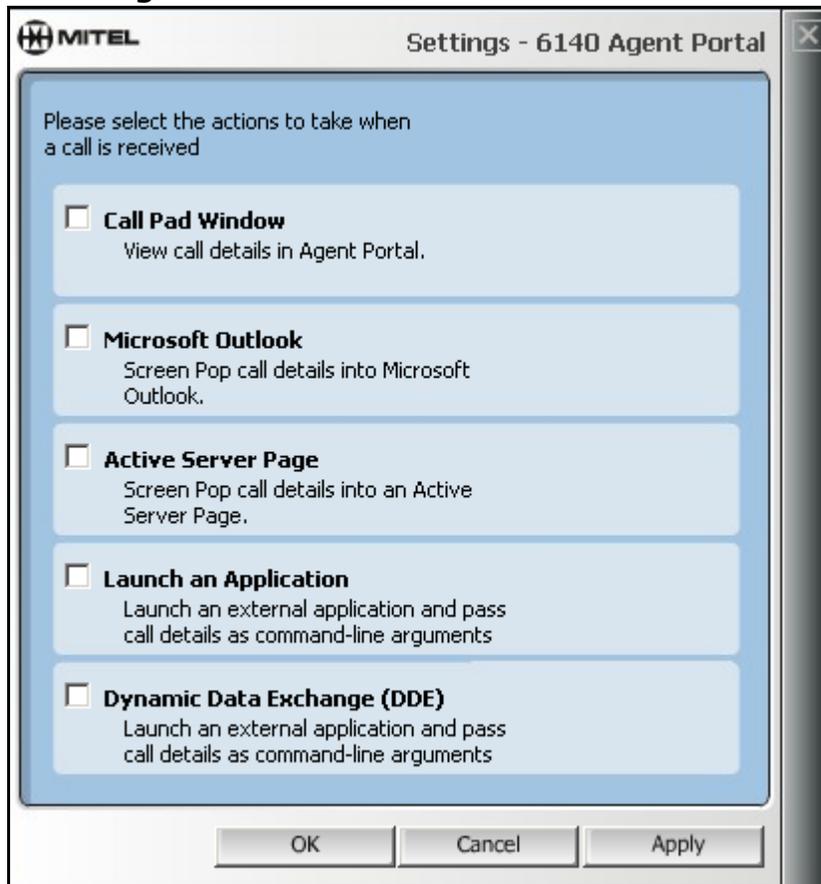
In addition to the above 'pops' included in the default Agent Portal client, you may wish to use the programmable Agent Portal Control OCX to create a custom application that launches third party applications. Agent Portal includes a demonstration of a custom application that launches a third party application that supports COM/OLE automation. For more information, refer to "OLE/COM demonstration" on page 45.

## Configuring launch application

Use the following procedure to configure one or more applications to launch when the agent receives a call:

1. In the Agent Portal Client interface, select **Settings**.  
The Settings window is displayed. (See Figure 4-10).

**Figure 4-10 Settings window**



2. Click in the selection boxes to select one or more applications to launch when a call is received. An Options button is displayed for that application.
3. For each application, select the Options button. An Options window is displayed.
4. Enter the required information for each Options window. For more information on how to complete the fields in each option window, refer to
  - “Configuring launch of Call Pad” on page 35
  - “Configuring launch of Microsoft Outlook windows” on page 36
  - “Configuring launch of Active Server Page applications” on page 39
  - “Configuring launch of applications that receive command line arguments” on page 40
  - “Configuring launch of applications capable of Dynamic Data Exchange” on page 41
5. Select **OK** to save your settings and close this window.

## Configuring launch of Call Pad

Call Pad is a simple text editor which displays information that has been programmed into the default Agent Portal Client software. Use the following procedure to determine what information is displayed in the call record sent to the agent:

1. In the Call Pad Options window (See Figure 4-11), select the appropriate values to display by clicking in the option boxes.

**Figure 4-11 Call Pad Options window**

Value:	Caption:
<input type="checkbox"/> Called Telephone Number	Number Dialed =
<input type="checkbox"/> Caller's Telephone Number	Caller's Telephone Number =
<input type="checkbox"/> Caller's Full Name	Caller's Name =
<input type="checkbox"/> Caller's First Name	Caller's First Name =
<input type="checkbox"/> Caller's Middle Name	Caller's Middle Name =
<input type="checkbox"/> Caller's Last Name	Caller's Last Name =
<input type="checkbox"/> Agent ID	Call Delivered to Agent
<input type="checkbox"/> Agent Extension	Call Delivered to Extension
<input type="checkbox"/> Additional Data	Additional Data =

The caption text is enabled for text additions or changes. This text is displayed on the agent's screen with the call record information.

2. Add or edit a caption using one of the following steps:
  - enter new text
  - select the existing text and enter new text
3. If you wish to allow the agent to enter additional data in the Call Pad text editor, select the 'Additional Data' option.  
If there is an Agent Portal Server and IVR integration, the data passed from the IVR to the server and then delivered to the client, is displayed under Additional Data.
4. Click **OK**.

## Configuring launch of Microsoft Outlook windows

In the Settings window, the Microsoft Outlook option allows you to display Microsoft Outlook's Contact window and populate it's Journal Entry windows. For more information, refer to the following procedures:

- "Configuring Contact window launch" on page 36
- "Configuring Journal window launch" on page 37

### Configuring Contact window launch

1. In the Outlook Options window, select the Contacts tab.  
The Contacts window is displayed. (See Figure 4-12)

**Figure 4-12 Microsoft Outlook Contacts Options window**

The screenshot shows the 'MITEL 6140 - Outlook Options' dialog box. It has two tabs: 'Contacts' (selected) and 'Journal Entry'. Under the 'Contacts' tab, there is a checked checkbox for 'Lookup Caller in Contacts'. Below this is a section titled 'Contact Telephone Numbers' which contains a list of telephone number types, each with a checkbox. The 'Business' type is checked. At the bottom of this section is a 'Contact Names' section with checkboxes for 'Assistant's Name', 'Company Name', 'Full Name' (checked), 'Last Name', 'First Name', and 'Middle Name'. The dialog box has 'OK' and 'Cancel' buttons at the bottom.

2. If you wish the system to search your Microsoft Outlook Contacts list for a match, select the 'Lookup Caller in Contacts' option.
  - If the system finds a match, the Contact window is displayed with the appropriate fields completed.
  - If the system does not find a match, no window is displayed.
3. In the Contact Telephone Numbers section, select the appropriate telephone numbers to perform the search based on the caller's ANI.  
These are the numbers that the system will search for in your Microsoft Outlook Contacts list.

- In the Contact Names section, select the appropriate names.  
These are the names that the system will search for in your Microsoft Outlook Contacts list.

## Configuring Journal window launch

- Select the Journal tab.  
The Journal window is displayed. (See Figure 4-13)

**Figure 4-13 Microsoft Outlook Journal Entry Options window**

MITEL 6140 - Outlook Options

Contacts Journal Entry

Create a journal entry for new calls

Select the information to insert into the Journal Entry

Value:	Caption:
<input type="checkbox"/> Called Telephone Number	Number Dialed =
<input checked="" type="checkbox"/> Caller's Telephone Number	Caller's Telephone Number =
<input checked="" type="checkbox"/> Caller's Full Name	Caller's Name =
<input type="checkbox"/> Caller's First Name	Caller's First Name =
<input type="checkbox"/> Caller's Middle Name	Caller's Middle Name =
<input type="checkbox"/> Caller's Last Name	Caller's Last Name =
<input type="checkbox"/> Agent ID	Call Delivered to Agent
<input type="checkbox"/> Agent Extension	Call Delivered to Extension
<input type="checkbox"/> Additional Data	Additional Data =

Start the Journal Call Timer.

Default Journal Entry Subject:

OK Cancel

- If you wish to create a journal entry each time you receive a call, select the option, Create a journal entry for new calls.  
Based on your selection in the Contacts window, the system displays the following upon receipt of a call:
  - If you de-selected 'Lookup Caller in Contacts', the system displays a journal entry for the call but it is not applied to a contact.
  - If you selected 'Lookup Caller in Contacts' and the system finds a match, both the Contact window and the Journal window are displayed with the appropriate fields completed and the journal entry is applied to the contact.
  - If you selected 'Lookup Caller in Contacts' and the system does not find a match, the system displays journal entry for the call but it is not applied to a contact.
- In the section titled 'Select the information to insert into the Journal Entry', select the appropriate information to enter by clicking in the option boxes.

The caption text is enabled for text additions or changes. This text is displayed in the Journal Entry for each call.

4. Add or edit a Caption using one of the following steps:
  - enter new text
  - select the existing text and enter new text
5. If you wish to time the call, select the option 'Start the Journal Call Timer'.  
The timer starts when the Journal Entry window is opened and stops when the window is closed or if you select the Pause button.
6. If you wish to distinguish journal entries for incoming calls from your other journal entries, enter an appropriate subject name in the option, 'Default Journal Entry Subject'.
7. Click **OK**.

## Configuring launch of Active Server Page applications

In the Settings window, the Active Server Page (ASP) option allows you to place data record information into any application that supports ASP. Use the following procedure to configure this option:

1. In the ASP Options window enter a path in the 'Base URL' field. (See Figure 4-14)  
This is the path to the ASP that you wish to launch.

**Figure 4-14 Active Server Page Options window**

Call Detail ASP Arguments:	
Value:	Parameter Name:
<input checked="" type="checkbox"/> Called Telephone Number	DNIS
<input checked="" type="checkbox"/> Caller's Telephone Number	ANI
<input type="checkbox"/> Caller's Full Name	
<input type="checkbox"/> Caller's First Name	
<input type="checkbox"/> Caller's Middle Name	
<input type="checkbox"/> Caller's Last Name	
<input checked="" type="checkbox"/> Agent ID	AgentID
<input checked="" type="checkbox"/> Agent Extension	AgentExtension
<input type="checkbox"/> Additional Data	

Additional ASP Arguments:

OK Cancel

2. Select the appropriate values to display by clicking the option boxes.  
The parameter name text is enabled for text additions or changes. Information is passed to the ASP via the parameter names that you enter in these fields.
3. Add or edit a parameter name using one of the following steps:
  - enter new text
  - select the existing text and enter new text
4. If there are additional static arguments that you wish to send to the ASP, enter them in the 'Additional ASP Arguments' field.
5. Click **OK**.

A demonstration of the Active Server Page functionality is provided with Agent Portal. For more information, refer to "Active Server Page demonstration" on page 43.

## Configuring launch of applications that receive command line arguments

In the Settings window, the Application Launch option allows you to configure the launch of any application that can receive call details as command-line arguments. Use the following procedure to configure this option:

1. In the Application Launch Options window, enter a path in the 'Application to Launch' field. (See Figure 4-15)  
This is the path to the application that will be launched.

**Figure 4-15 Application Launch Options window**

Value:	Parameter Name:
<input type="checkbox"/> Called Telephone Number	
<input type="checkbox"/> Caller's Telephone Number	
<input type="checkbox"/> Caller's Full Name	
<input type="checkbox"/> Caller's First Name	
<input type="checkbox"/> Caller's Middle Name	
<input type="checkbox"/> Caller's Last Name	
<input type="checkbox"/> Agent ID	
<input type="checkbox"/> Agent Extension	
<input type="checkbox"/> Additional Data	

2. If necessary, click the button opposite the 'Application to Launch' field to browse to the application.
3. Select the appropriate values to be passed to the application as arguments.  
The parameter name field is enabled for the name of the argument that the application is expecting. Information is passed to the application via the parameter names that you enter in these fields.
4. Add or edit a parameter name using one of the following steps:
  - enter new text
  - select the existing text and enter new text
5. If there are additional static arguments that you wish to send to the application, enter them in the 'Additional ASP Arguments' field.
6. Click **OK**.

A demonstration of this functionality is provided with Agent Portal. For more information, refer to "Command Line demonstration" on page 44.

## Configuring launch of applications capable of Dynamic Data Exchange

In the Settings window, the Dynamic Data Exchange (DDE) option provides information via command-line arguments to any application that uses DDE. Use the following procedure to configure this option:

1. In the DDE Options window, select the appropriate value to display. (See Figure 4-16)

**Figure 4-16 DDE Options window**

DDE Parameters		
Value:	DDE Topic Name:	DDE Item Name:
<input type="checkbox"/> Called Telephone Number		
<input type="checkbox"/> Caller's Telephone Number		
<input type="checkbox"/> Caller's Full Name		
<input type="checkbox"/> Caller's First Name		
<input type="checkbox"/> Caller's Middle Name		
<input type="checkbox"/> Caller's Last Name		
<input type="checkbox"/> Agent ID		
<input type="checkbox"/> Agent Extension		
<input type="checkbox"/> Additional Data		

**Executable**

Launch Program Enter the path and file name of the program that will receive the call information.

\_\_\_\_\_

OK Cancel

When you select a value, the DDE topic name and item name fields are enabled.

2. Enter the correct value for the DDE topic name and item name.
3. Select the 'Launch Program' option.
4. In the 'Executable' field, enter the path to the program that will receive the call information. If necessary, you can click the button opposite this field to browse to the application.
5. Click **OK**.

A demonstration of this functionality is provided with Agent Portal. For more information, refer to "Command Line demonstration" on page 44.

## Application demonstrations

There are four demonstrations included with Agent Portal. To view any of these demonstrations, launch it using one of the following procedures:

- “Dynamic Data Exchange demonstration” on page 42
- “Active Server Page demonstration” on page 43
- “Command Line demonstration” on page 44
- “OLE/COM demonstration” on page 45

### Dynamic Data Exchange demonstration

This demonstration is an example of how Agent Portal can be used to send data to a third party application that supports Dynamic Data Exchange (DDE). Use the following procedure to launch the demonstration:

1. In the Agent Portal Client interface, select Settings.
2. Select the option, Dynamic Data Exchange (DDE).
3. Select the Options button for this application.
4. Configure the DDE options. (See Figure 4-17).

**Figure 4-17 DDE Options configuration for demonstration**

DDE Parameters		
Value:	DDE Topic Name:	DDE Item Name:
<input checked="" type="checkbox"/> Called Telephone Number	EXCEL Sheet4	R3C2
<input checked="" type="checkbox"/> Caller's Telephone Number	EXCEL Sheet4	R2C2
<input checked="" type="checkbox"/> Caller's Full Name	EXCEL Sheet4	R4C2
<input checked="" type="checkbox"/> Caller's First Name	EXCEL Sheet4	R5C2
<input type="checkbox"/> Caller's Middle Name	EXCEL Sheet4	R14C3
<input checked="" type="checkbox"/> Caller's Last Name	EXCEL Sheet4	R6C2
<input checked="" type="checkbox"/> Agent ID	EXCEL Sheet4	R7C2
<input checked="" type="checkbox"/> Agent Extension	EXCEL Sheet4	R8C2
<input type="checkbox"/> Additional Data	EXCEL Sheet4	R9C3

**Executable**

Launch Program Enter the path and file name of the program that will receive the call information.

D:\Program Files\Microsoft Office\Office10\EXCEL.EXE

OK Cancel

5. On the **Mitel Networks™ 6140 Agent Portal CD**, navigate to /Client/Samples/Excel DDE.
6. Select the Excel DDE folder and copy it onto the workstation where you will run your demonstration.
7. In the DDE folder, open the file called DDE Call Log.xls.  
This opens the demonstration file in Excel.
8. In the Agent Portal Client interface, select **Login**.
9. In the Login window, enter your log-in information and select **OK**.
10. Place a call to an agent's extension, ACD path or AgentID.  
An Excel spreadsheet is displayed with the call information displayed in the appropriate fields.

## Active Server Page demonstration

This demonstration is an example of how the Agent Portal can be used to send data to a third party application that supports ASP. Use the following procedure to launch the demonstration:

1. On a workstation running a web server, create a physical directory called Screen Pop.
2. On the same workstation, create a virtual directory called Screen Pop and map it to the physical directory.
3. On the **Mitel Networks™ 6140 Agent Portal CD**, navigate to /Client/Samples/ASP.
4. Select the ASP folder and copy it onto the workstation where you will run your demonstration.
5. Copy the files, ScreenPop.ASP and AgentPortal.JPG, to the physical directory you created in step 1.
6. In the Agent Portal Client interface, select **Settings**.
7. Select the option, Active Server Page.
8. Select the Options button for this application.
9. Configure the ASP options. (See Figure 4-18).

**Figure 4-18 Active Server Page configuration for demonstration**

The screenshot shows the '6140 - ASP Options' dialog box. At the top, there is a 'Base URL' field containing the text 'where the ScreenPop.asp file resides'. Below this is a section titled 'Call Detail ASP Arguments:' which contains a table with two columns: 'Value' and 'Parameter Name'. The table lists the following call detail fields with checkboxes:

Value	Parameter Name
<input checked="" type="checkbox"/> Called Telephone Number	DNIS
<input checked="" type="checkbox"/> Caller's Telephone Number	ANI
<input checked="" type="checkbox"/> Caller's Full Name	CallerName
<input checked="" type="checkbox"/> Caller's First Name	FirstName
<input type="checkbox"/> Caller's Middle Name	
<input checked="" type="checkbox"/> Caller's Last Name	LastName
<input checked="" type="checkbox"/> Agent ID	AgentID
<input checked="" type="checkbox"/> Agent Extension	AgentExt
<input type="checkbox"/> Additional Data	

Below the table is an 'Additional ASP Arguments:' section with a large empty text area. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

10. In the Agent Portal Client interface, select **Login**.
11. In the Login window, enter your log-in information and select **OK**.
12. Call an agent's extension, ACD path or AgentID.  
An Internet Explorer window displays the Mitel 6140 Agent Portal ASP demonstration page.

## Command Line demonstration

This demonstration is an example of how Agent Portal can be used to send data to a third party application that supports command line arguments. Use the following procedure to launch the demonstration:

1. On the **Mitel Networks™ 6140 Agent Portal CD**, navigate to /Client/Samples/COM.
2. Select the COM folder and copy it onto the workstation where you will run your demonstration.
3. Copy the SampleEXE.exe file to a location on your workstation.
4. In the Agent Portal Client interface, select **Settings**.
5. Select the option, 'Launch an Application'.
6. Select the Options button.
7. Configure the ASP options. (See Figure 4-19).

**Figure 4-19 Command Line Argument Configuration for demonstration**

Value:	Parameter Name:
<input checked="" type="checkbox"/> Called Telephone Number	-Dialed Number =
<input checked="" type="checkbox"/> Caller's Telephone Number	-Caller ID =
<input checked="" type="checkbox"/> Caller's Full Name	-Caller's Name =
<input type="checkbox"/> Caller's First Name	
<input type="checkbox"/> Caller's Middle Name	
<input type="checkbox"/> Caller's Last Name	
<input checked="" type="checkbox"/> Agent ID	-Agent ID =
<input checked="" type="checkbox"/> Agent Extension	-Agent EXT =
<input checked="" type="checkbox"/> Additional Data	

8. In the Agent Portal Client interface, select **Login**.
9. In the Login window, enter your log-in information and select **OK**.
10. Call an agent's extension/path or AgentID.  
A text box displays the information that has been transferred.

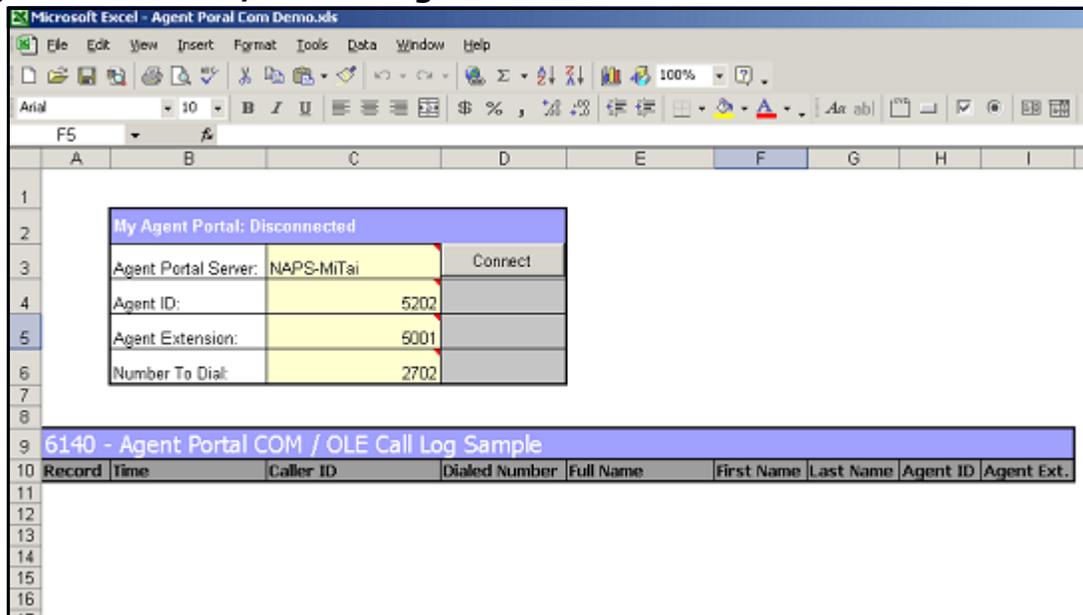
## OLE/COM demonstration

This demonstration is an example of a Agent Portal integration to a third party application. This functionality allows the integration of any third party application that supports COM/OLE Automation. For this example code was written, using the Agent Portal tools, to create a stand-alone client in Excel.

Use the following procedure to launch the demonstration:

1. Log off and exit the Agent Portal Client.  
The Agent Portal Client must be stopped before proceeding with this demonstration.
2. On the **Mitel Networks™ 6140 Agent Portal CD**, navigate to /Client/Samples/Com OLE.
3. Select the COM-OLE folder and copy it onto the workstation where you will run your demonstration.
4. In the COM-OLE folder, open the Agent Portal Com Demo.xls file.  
The demonstration file opens in Excel. (See Figure 4-20)
5. Enter the following information in the Excel window:
  - Agent Portal Server name or ip address
  - Agent ID
  - Agent extension
  - Number to dial

**Figure 4-20 COM/OLE configuration for demonstration**



6. Select **Connect**.  
The Login button is enabled.
7. Select **Login**.  
The Dial In button is enabled.
8. Enter a number in the 'Number to Dial' field.
9. Call the agent's extension, path or Agent ID.
10. Select **Dial**.  
The first Excel row in the 'Call Log Sample' section is populated with the call information.

To view the code for this demonstration, verify that Excel is running, press Alt F11 and open the file, Sheet1MyAgent.



# Agent procedures for Agent Portal Client

After the Agent Portal Server and Client are configured, the Agents can log in and begin using the Agent Portal Client. Agents use the Agent Portal Client to perform the following procedures:

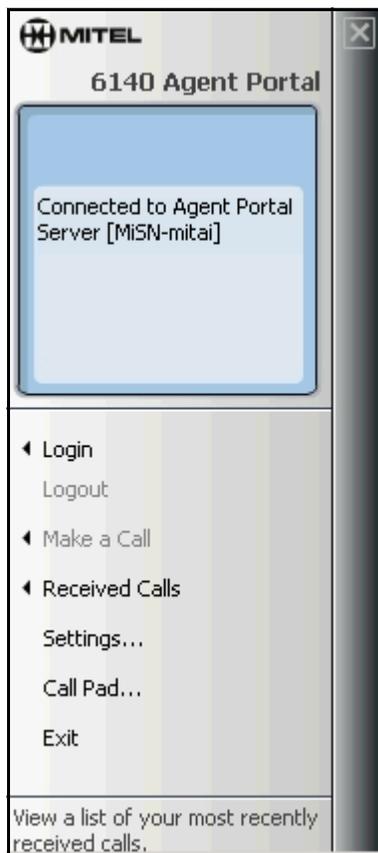
- “Logging in to Agent Portal Client” on page 47
- “Logging out of Agent Portal Client” on page 48
- “Exiting Agent Portal Client” on page 48
- “Making a call” on page 49
- “Displaying and returning received calls” on page 49
- “Stop monitoring a device” on page 50
- “Using other applications displayed on your screen” on page 51
- “Troubleshooting” on page 54

## Logging in to Agent Portal Client

Use the following procedure to log in to the Agent Portal Client interface:

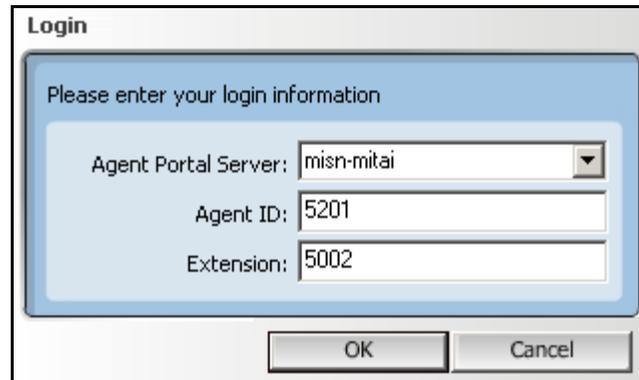
1. From the Programs menu, select Mitel Networks, 6140 Agent Portal Client.  
The Agent Portal icon is displayed in the system tray. The icon is red before you log in to the system.
2. Select the Agent Portal icon.  
The Agent Portal Client interface is displayed. (See Figure 5-1)

**Figure 5-1 Agent Portal Client interface**



3. Select the **Login** option.  
The Login window is displayed. (See Figure 5-2)

**Figure 5-2 Login window**



4. In the Login window, enter your Agent Portal Server name or ip address.
5. Enter your agent ID and your extension number.  
If you do not enter your agent ID, calls can only be sent to your extension number.
6. Select **OK**.
7. The Status window displays the message 'Login Successful'.

## Logging out of Agent Portal Client

If you wish to log out of the Agent Portal Server but leave the Agent Portal application running, use the following procedure:

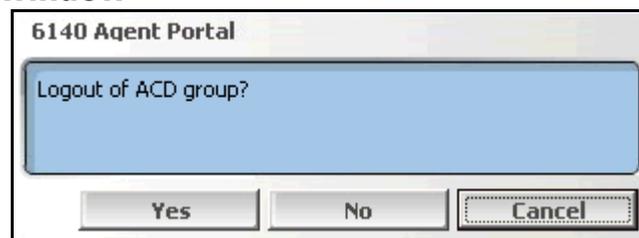
1. In the Agent Portal interface, select **Logout**.  
The Status window displays the message 'Logout Successful'.

## Exiting Agent Portal Client

If you wish to log out of the Agent Portal Server and close the Agent Portal application, use the following procedure:

1. In the Agent Portal Client interface, select **Exit**.  
One of the following occurs:
  - The Agent Portal Client interface is closed.
  - A message is displayed asking if you wish to logout of ACD group. (See Figure 5-3)

**Figure 5-3 Exit window**



- This window indicates that you have not logged out of the Agent Portal Client.
2. If this window is displayed, select a button:
    - If you wish to log off Agent Portal Client and log out of the ACD, select **Yes**.

- If you wish to log off Agent Portal Client and remain logged into the ACD, select **No**. The Agent Portal Client is shut down.

## Making a call

You can use a telephone set to make a call or you can use the **Make a Call** option on your 6140 Agent Portal Client interface. Use the following procedure to make a call using the Agent Portal Client:

1. In the Agent Portal Client interface, select the **Make a Call** option. The Make a Call window is displayed. (See Figure 5-4)

**Figure 5-4 Make a Call window**

2. Enter the telephone number you wish to dial. If it is necessary to dial a prefix, select the Prefix option and select a number from the drop-down list.
3. Select **Dial**. The dialed number is displayed in the interface display window.

## Displaying and returning received calls

The Received Calls options allows you to display a list of all the calls you have received as well as to return any of these calls. Information for up to 20 received calls is saved. If more than 20 calls are received, the system begins deleting the oldest calls first. Use the following procedure:

1. In the Agent Portal Client interface, select the **Received Calls** option. The call number is displayed with the person, date and time of the call. (See Figure 5-5)
2. If you wish to call one of the listed numbers, select the number and then select **Dial**. The 'Make a Call' window is displayed with the selected number entered in the 'Phone Number' field.
3. Select **Dial**.

Received calls continue to be stored and displayed on this window until you clear the list. To clear all the entries in this list, select **Clear List**.

**Figure 5-5 Received calls window**



Name	Phone Number	Date	Time
Dave Thompson	6135922122	11/19/2002	09:18:50 AM
J. Sandbury	6138353999	11/19/2002	08:54:48 AM
A & L Collins	6132568973	11/19/2002	08:54:23 AM
John Faulkner	5192436932	11/19/2002	08:50:54 AM
D Mullin	7056824569	11/19/2002	08:43:43 AM
George Bradley	8194587531	11/19/2002	08:43:37 AM
Neale Seguin	4167548090	11/19/2002	08:43:29 AM
D & W Blue	8195265551	11/19/2002	08:41:49 AM
Andrew Smith	6138354040	11/19/2002	08:19:33 AM
T. Madley	6138356574	11/19/2002	08:15:07 AM
Jason Taylor	4167854320	11/19/2002	08:13:52 AM
B. Burchell	4167829565	11/19/2002	08:10:57 AM
H. Duriez	8198734500	11/19/2002	08:07:46 AM
T. Geiger	8198965343	11/19/2002	08:03:14 AM
J. Cameron	7056740140	11/19/2002	08:01:38 AM

Clear List      Dial      Cancel

## Stop monitoring a device

Use the following procedure to stop the monitoring for a device:

1. In the Agent Portal Server interface, select **Monitors**.  
The Device Monitors window is displayed. (See Figure 5-6)

**Figure 5-6 Device Monitors window**

Enable Monitors For Devices (ie. IVR, Voicemail, etc.)

Monitor	Type
▶ 5005	EXTENSION

New Delete

Monitor: 5005

Monitor Type: EXTENSION

Save

2. Select **Stop**.  
Monitoring is stopped for all devices. The status window indicates that the monitors are stopped. At this point, you can delete any device from the Device Monitoring window.
3. In the upper pane, select the device you wish to stop monitoring.
4. Select **Delete**.
5. Select **Start**.  
All the devices listed in this window are currently being monitored.

## Using other applications displayed on your screen

Your Agent Portal Client interface may have been configured to launch third party applications which display caller information. For more information on using some of these applications in Agent Portal, refer to

- “Using Call Pad” on page 51
- “Using Contact window in Microsoft Outlook” on page 52
- “Using Journal Entry window in Microsoft Outlook” on page 53

## Using Call Pad

If the Call Pad window is displayed on your workstation, use the following procedure to update the existing information:

1. Enter additional information in this window.
2. Select **Save** from the File menu.

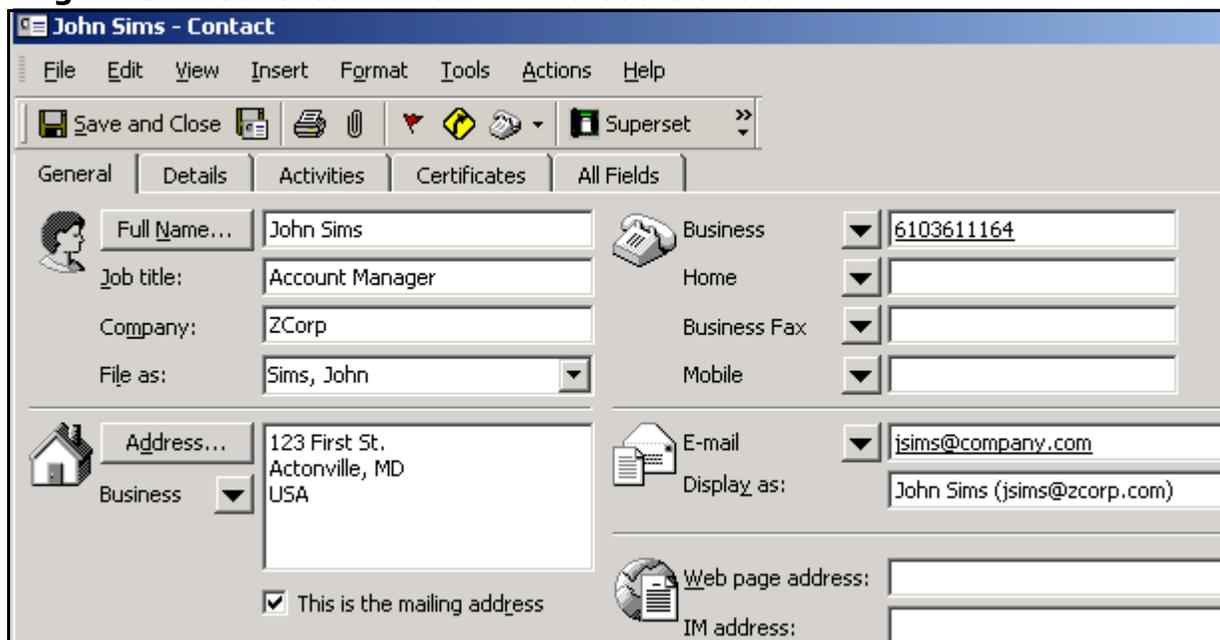
3. Close the window, using the Windows Close button.  
A message is displayed which asks you if you want to save the changes.
4. Select **OK**.
5. Browse to the folder where you wish to save this file.
6. Select **Save**.

## Using Contact window in Microsoft Outlook

If the Contact window is displayed on your workstation, use the following procedure to update the existing information or to return the call:

1. Using standard Microsoft Outlook procedures, update the information in this Contact window. (See Figure 5-7)

**Figure 5-7 Contact window in Microsoft Outlook**



2. If you wish to return the call, click the **Superset** button in the tools bar.  
A window is displayed which lists all the telephone numbers in your caller's Contact window.
3. Select the number you wish to dial.
4. Select **Dial**.

## Using Journal Entry window in Microsoft Outlook

If the Journal Entry window is displayed on your workstation, use the following procedure to view caller information and to time your call.

1. Using standard Microsoft Outlook procedures, update the information in this Journal Entry window.

**Figure 5-8 Journal Entry window in Microsoft Outlook**

**Incoming Calls - Journal Entry**

File Edit View Insert Format Tools Actions Help

Save and Close Print Cut Copy Paste Undo Redo

Subject: Incoming Calls

Entry type: Phone call

Start time: Tue 11/19/2002 8:19 AM Start Timer

Duration: 1 minute Pause Timer

New Call: Tuesday November 19, 2002 08:19:24  
 Number Dialed = 5555551  
 Caller's Telephone Number = 6103611164  
 Caller's Name = John  
 Caller's First Name = John  
 Caller's Middle Name =  
 Caller's Last Name = Sims  
 Call Delivered to Agent 5201  
 Call Delivered to Extension 5007

Contacts... John Sims

2. To start the timer, select 'Start Timer'.  
If you wish to pause the timer, select 'Pause Timer'. The timer is stopped when you exit this window.
3. Add additional information to this journal by entering text below the last line.
4. Save this journal entry by selecting **Save** from the File menu.

## Troubleshooting

The following table includes a set of possible error messages, their meaning and the actions you can take to resolve the problem.

**Table 5-1:**

<b>Error message</b>	<b>Meaning</b>	<b>Actions</b>
Server Invoked Logout	<ul style="list-style-type: none"> <li>• Connection to MiTAI was lost</li> <li>• Administrator logged you out of Agent Portal</li> </ul>	When advised by administrator, log back in to Agent Portal Client using the procedures in “Logging in to Agent Portal Client” on page 47.
Agent ‘x’ at extension ‘y’ cannot be monitored	Extension cannot be monitored	Contact administration to verify that the extension is a type that can be monitored.
Agent ‘x’ at extension ‘y’ cannot be monitored [invalid device]	Extension cannot be monitored	Contact administration to verify that the extension is a type that can be monitored.
Login of Agent ‘x’ at extension ‘y’ could not be confirmed	Agent ID may currently be in use	Verify that the Agent ID you have entered is valid
Login of Agent at extension ‘y’ could not be confirmed (similar to previous error messages)	Agent ID was not entered in Login window	<ul style="list-style-type: none"> <li>• If you do not need the Agent Portal ACD, disregard message</li> <li>• If you wish to use Agent Portal ACD, enter your Agent ID.</li> </ul>
Error connecting to Agent Portal Server [server_name]	Cannot connect to the server identified in your Login window because: <ul style="list-style-type: none"> <li>• incorrect entry of server</li> <li>• server is not running</li> </ul>	<ul style="list-style-type: none"> <li>• Verify correct entry of server name in Login window</li> <li>• Contact administrator to determine if server is running</li> </ul>
Unable to make a call to ‘extension #’ [Invalid device specified]	An invalid number was entered in the ‘Make a Call’ window	Verify that you have entered the correct number

# Appendix A: Agent Portal Control programmer reference

The Agent Portal Control is a programmable OLE Custom control (OCX) component file that can be referenced by any object-oriented programming application. This appendix contains the property, method and event information required to program the Agent Portal Control.

## Properties

The following Properties are used in the Agent Portal Control:

- Extension
- AgentID
- ConnectionState
- ServerAddress
- ServerPort

**Table 6-1: Extension Property definition**

<b>Extension</b>	
<b>Use</b>	Returns or sets the extension number of the telephone that the agent is using
<b>Syntax</b>	<i>Object.Extension = string</i>
<b>Arguments</b>	<i>Object</i> - the instance of the Agent Portal Control <i>string</i> - the extension number of the telephone
<b>Remarks</b>	Extension can be set at run time or design time. This sets the telephone extension that is used when invoking the MakeCall, Login and Logout methods. Extension can also be set as an argument to the Login method.

**Table 6-2: AgentID Property definition**

<b>AgentID</b>	
<b>Use</b>	Returns or sets the Automatic Call Distribution (ACD) Agent ID that the agent is using
<b>Syntax</b>	<i>Object.AgentID = string</i>
<b>Arguments</b>	<i>Object</i> - the instance of the Agent Portal Control <i>string</i> - the ACD Agent ID of the user
<b>Remarks</b>	AgentID can be set at run time or design time. This is the AgentID that is used when invoking the Login and Logout methods. AgentID can also be set as an argument to the Login method.

**Table 6-3: ConnectionState Property definition**

<b>ConnectionState</b>			
<b>Use</b>	Returns the state of the connection to the Agent Portal Server, expressed as an enumerated type This a read only property and is unavailable at design time.		
<b>Syntax</b>	<i>Object.ConnectionState</i>		
<b>Data type</b>	Integer		
<b>Settings</b>	eCLOSED	0	Closed. This is the default
	eOPEN	1	Open
	eLISTENING	2	Listening
	eCONNECTIONPENDING	3	Connection pending
	eRESOLVINGHOST	4	Resolving server name
	eHOSTRESOLVED	5	Server name is resolved
	eCONNECTING	6	Connecting to the server
	eCONNECTED	7	Connected to the server
	eCLOSING	8	Server is closing connection
	eError	9	Error

**Table 6-4: ServerAddress Property definition**

<b>ServerAddress</b>			
<b>Use</b>	Returns or sets the address of the remote Agent Portal Server machine to which the Agent Portal Control should connect.		
<b>Syntax</b>	<i>Object.ServerAddress = string</i>		
<b>Arguments</b>	<i>Object</i> - the instance of the Agent Portal Control <i>string</i> - the hostname or ip address of the Agent Portal Server.		
<b>Remarks</b>	ServerAddress can be set at run time or design time. ServerAddress can also be set as an argument to the Connect method.		

**Table 6-5: ServerPort Property definition**

<b>ServerPort</b>	
<b>Use</b>	Returns or sets the remote port number, to connect to, on the Agent Portal Server
<b>Syntax</b>	<i>Object.ServerPort = Long</i>
<b>Arguments</b>	<i>Object</i> - the instance of the Agent Portal Control <i>Long</i> - The port number, to connect to, on the Agent Portal Server
<b>Remarks</b>	ServerPort can be set at run time or design time. ServerPort can also be set as an argument to the Connect method. The default ServerPort is 50,000.

## Methods

The following Methods are used in the Agent Portal Control:

- Connect
- Disconnect
- Login
- Logout
- MakeCall

**Table 6-6: Connect Method definition**

<b>Connect</b>	
<b>Use</b>	Connects the agent application to the Agent Portal Server. Also refer to ConnectionStatus event.
<b>Syntax</b>	<i>Object.Connect (Server, Port)</i>
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control <i>Server</i> - the host name or ip address of the Agent Portal Server <i>Port</i> - the predefined port or socket that is known to be listening for new requests on the Agent Portal Server.
<b>Return Value</b>	Value of 1 indicates a successful request Any value other than 1 indicates a failures. For more information on error codes and their reason, refer to “Server return values” on page 65.

**Table 6-7: Disconnect Method definition**

<b>Disconnect</b>	
<b>Use</b>	Disconnects the agent application to the Agent Portal Server. Also refer to ConnectionStatus event.
<b>Syntax</b>	<i>Object.Disconnect</i>
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control
<b>Return Value</b>	Value of 1 indicates a successful request Any value other than 1 indicates a failures. For more information on error codes and their reason, refer to “Server return values” on page 65.

**Table 6-8: Login Method definition**

<b>Login</b>	
<b>Use</b>	Logs an agent in to both the Agent Portal Server and the ACD group on the PBX. Also refer to LoginStatus event.
<b>Syntax</b>	<i>Object.Login (AgentID, Extension)</i>
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control <i>AgentID</i> - the assigned agent ID number the agent uses to login to the PBX <i>Extension</i> - the extension number of the telephone the agent uses
<b>Return Value</b>	Value of 1 indicates a successful request Any value other than 1 indicates a failures. For more information on error codes and their reason, refer to “Server return values” on page 65.
<b>Remarks</b>	The agent must use the application to login to the ACD group. If the agent does not use the application to login, the Agent Portal Server cannot associate the correct call event to the agent’s ip address.

**Table 6-9: Logout Method definition**

<b>Logout</b>	
<b>Use</b>	Logs an agent out of both the Agent Portal Server and the ACD group on the PBX. Also refer to LogoutStatus event.
<b>Syntax</b>	<i>Object.Logout (AgentID, Extension)</i>
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control <i>AgentID</i> - the assigned agent ID number the agent is currently using <i>Extension</i> - the extension number of the telephone the agent is currently using
<b>Return Value</b>	Value of 1 indicates a successful request Any value other than 1 indicates a failures. For more information on error codes and their reason, refer to “Server return values” on page 65.

**Table 6-10: MakeCall Method definition**

<b>MakeCall</b>	
<b>Use</b>	Dials the agent's telephone. Also refer to DialStatus event.
<b>Syntax</b>	<i>Object</i> .MakeCall (Destination)
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control <i>Destination</i> - The dialable number to be dialed from the agent's telephone
<b>Return Value</b>	Value of 1 indicates a successful request Any value other than 1 indicates a failures. For more information on error codes and their reason, refer to "Server return values" on page 65.

## Events

The following Events are used in the Agent Portal Control:

- CallInfoReceived
- ConnectionStatus
- DialStatus
- LoginStatus
- LogoutStatus

**Table 6-11: CallInfoReceived Event definition**

<b>CallInfoReceived</b>	
<b>Use</b>	Occurs when a call is received at an agent's telephone
<b>Syntax</b>	<i>Object_CallInfoReceived</i> ( <i>ANI</i> as String, <i>DNIS</i> as String, <i>CallerFirstName</i> as String, <i>CallerMiddleName</i> as String, <i>CallerLastName</i> as String, <i>Data</i> as String, <i>AgentID</i> as String, <i>Extension</i> as String)
<b>Arguments</b>	<p><i>Object</i> - the declared instance of the Agent Portal control</p> <p><i>ANI</i> - the Automatic Number Identification of the caller (the calling line ID)</p> <p><i>DNIS</i> - the original DNIS (dialed digits) sent to the PBX by the Telco</p> <p><i>CallerFirstName</i> - the caller's first name if present</p> <p><i>CallerMiddleName</i> - the caller's middle name if present</p> <p><i>CallerLastName</i> - the caller's last name if present</p> <p><i>Data</i> - any additional data to be associated with the call</p> <p><i>AgentID</i> - the ID of the Agent that the call is for</p> <p><i>Extension</i> - The extension of the telephone intended to receive the call</p>

**Table 6-12: Connection Status Event definition**

<b>Connection Status</b>			
<b>Use</b>	Occurs when the state of the Winsock connection to the Agent Portal Server changes		
<b>Syntax</b>	<i>Object</i> _ConnectionStatus ( <i>Status</i> as AgentPortalObject.ConnectionState)		
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control <i>Status</i> - the current status of the Winsock connection to the Agent Portal Server		
<b>Settings for AgentPortalObject.ConnectionState</b>	eCLOSED	0	Closed. This is the default
	eOPEN	1	Open
	eLISTENING	2	Listening
	eCONNECTIONPENDING	3	Connection pending
	eRESOLVINGHOST	4	Resolving server name
	eHOSTRESOLVED	5	Server name is resolved
	eCONNECTING	6	Connecting to the server
	eCONNECTED	7	Connected to the server
	eCLOSING	8	Server is closing connection
	eError	9	Error

**Table 6-13:**

<b>LicenseExceeded</b>			
<b>Use</b>	Occurs if the purchased number of concurrent Agent Connections has been exceeded.		
<b>Syntax</b>	<i>Object</i> _LicenseExceeded()		
<b>Arguments</b>	<i>Object</i> - the declared instance of the Agent Portal Control		

**Table 6-14: LoginStatus Event definition**

<b>LoginStatus</b>	
<b>Use</b>	Occurs after a request to login an agent was processed by the server
<b>Syntax</b>	<i>Object_LoginStatus</i> ( <i>Status</i> as AgentPortalObject.Result, <i>AgentID</i> as String, <i>Extension</i> as String, <i>Reason</i> as String)
<b>Arguments</b>	<p><i>Object</i> - the declared instance of the Agent Portal Control</p> <p><i>Status</i> - value is 'true' if the server was able to login the agent, value is 'false' if server was unable to login the agent</p> <p><i>AgentID</i> - the agent ID of the agent that the request was made for</p> <p><i>Extension</i> - the extension of the agent that the request was made for</p> <p><i>Reason</i> - if server was unable to login the agent, a reason is given</p>

**Table 6-15: LogoutStatus Event definition**

<b>LogoutStatus</b>	
<b>Use</b>	Occurs after a request to logout an agent was processed by the server
<b>Syntax</b>	<i>Object_LogoutStatus</i> ( <i>Status</i> as AgentPortalObject.Result, <i>AgentID</i> as String, <i>Extension</i> as String, <i>Reason</i> as String)
<b>Arguments</b>	<p><i>Object</i> - the declared instance of the Agent Portal Control</p> <p><i>Status</i> - value is 'true' if the server was able to logout the agent, value is 'false' if server was unable to logout the agent</p> <p><i>AgentID</i> - the agent ID of the agent that the request was made for</p> <p><i>Extension</i> - the extension of the agent that the request was made for</p> <p><i>Reason</i> - if server was unable to logout the agent, a reason is given</p>

**Table 6-16: MakeCallStatus Event definition**

<b>MakeCallStatus</b>	
<b>Use</b>	Occurs after a request to dial an agent's telephone was processed by the server
<b>Syntax</b>	<i>Object_MakeCallStatus (Status as Boolean, Destination as String, Reason as String)</i>
<b>Arguments</b>	<p><i>Object</i> - the declared instance of the Agent Portal Control</p> <p><i>Status</i> - value is 'true' if the server was able to dial the requested telephone; value is 'false' if server was unable to dial the requested telephone</p> <p><i>Destination</i> - the telephone number the server was asked to dial</p> <p><i>Reason</i> - if server was unable to dial the requested telephone, a reason is given</p>

**Table 6-17: ServerUnavailable Event definition**

<b>ServerUnavailable</b>	
<b>Use</b>	Occurs if communication to the Agent Portal Server could not be established
<b>Syntax</b>	<i>Object_Server Unavailable ( )</i>
<b>Arguments</b>	<i>Object</i> - The declared instance of the AgentPortal control

## Server return values

The following table lists the return values which indicate the status of requests sent to the Agent Portal Server.

**Table 6-18: Return values for status of requests**

Value	Reason
1	The request was successful
2	An error was encountered in the Agent Portal Server application
3	The requested agent could not be logged in
4	A monitor could not be set on the extension specified
5	An unknown error has occurred

The following table lists the return values which indicate an error was encountered between the Agent Portal Server and the PBX.

**Table 6-19: Return values for errors between Agent Portal Server and PBX**

Value	Reason
1001	Command failed
1103	Communication with the PBX could not be initialized
1104	Server unavailable
1105	Communication error
1205	Memory error
1206	Warning: No event
1207	A required attribute is missing
1209	Attribute not supported
1211	Unknown attribute
1213	Data lost
1215	Unspecified error
1217	Congestion communicating with the PBX
1219	Privilege violation
1221	Invalid device specified
1223	Invalid Call ID specified

**Table 6-19: Return values for errors between Agent Portal Server and PBX**

Value	Reason
1225	Invalid PBX handle
1227	Invalid Monitor handle
1229	The called device is invalid
1231	Unable to originate the call
1233	No call to clear
1235	No active call
1237	No held call
1239	No call to hold
1241	No call to answer
1243	No call to complete
1245	The requested feature could not be invoked
1247	No call to divert
1249	The requested feature is invalid for the device
1251	Too many monitors are set
1253	The feature is already set
1255	The feature is not set
1261	The PBX is already open
1265	The Mitai environment is absent
1267	A split is not possible
1269	Unknown service
1273	The PBX is not open
1275	An unknown event occurred
1277	A callback is already present
1278	A callback is not present
1279	Invalid attribute value
1281	Send callback message failed
1283	The device is already monitored

**Table 6-19: Return values for errors between Agent Portal Server and PBX**

Value	Reason
1285	Cannot establish a monitor
1287	The requested device is not monitorable
1289	Cannot get enough shared memory
1291	Invalid directory number
1292	The directory number is too long
1295	The attribute is duplicated
1294	Invalid ACD path
1296	Invalid ACD group
1297	Invalid truck type
1299	The command was rejected
1350	LAN failure
1351	LAN timeout
1352	Broken socket detected
1353	Invalid LAN message
1354	Service full
1360	Cannot connect to the service
1361	LAN parser failed
1362	LAN encoder failed
1401	Internal event error
1403	Too many blocking commands
1404	PBX already initialized
1405	Cannot create mutex
1406	Mutex abandoned
1407	A Directory Number is required
1408	Mutex problem detected



# Glossary

- Active X** Active X is the name Microsoft has given to a set of strategic object-oriented programming technologies and tools.
- ANI** Automatic Number Identification (ANI) is a service that provides the telephone number of a received call. The service provider determines the method of providing this information.
- ASP** Active Server Pages (ASP) is a Microsoft specification that uses ActiveX scripting to dynamically create web pages with a .ASP extension.
- COM** Component Object Model (COM) is a software architecture that allows applications to be built from binary software components.
- DDE** Dynamic Data Exchange (DDE) allows information to be shared or communicated between programs. For example, when you share information between a Excel spreadsheet and a Word document, if you make a change in the Excel spreadsheet, that value also changes in your Word document. Applications that use DDE include Microsoft's Excel, Word, Lotus 1-2-3, AmiPro, Quattro Pro, and Visual Basic.
- DNIS** Dialed Number Identification Service (DNIS) is a service that provides the dialed telephone number to the recipient of the call. DNIS is a common feature of 800 and 900 lines. For example, if you have multiple 800 or 900 numbers to the same destination, DNIS identifies the number that was called.
- IVR** Interactive Voice Response (IVR) is a software application that accepts a combination of voice telephone input and touch-tone keypad selection. The IVR provides appropriate responses in the form of voice, fax, callback, email and other media.
- OLE** Object Linking and Embedding (OLE) is a Microsoft standard that allows you to create objects in one application and link them in a second application.
- OCX** OLE Custom Control (OCX) is an independent program module that can be accessed by other programs running in Microsoft Windows. The OCX is a dynamic link library (DLL) module or subprogram that can be used by other applications.
- MiTAI** Mitel Telephony Applications Interface (MiTAI) is an Applications Protocol Interface (API) that allows third-party-developed CTI applications to interface with the Mitel Network's call control
- SAM** Security Access Module (SAM) is a device that attaches to a PC's parallel port to control access to a particular application.

