



A MITEL  
PRODUCT  
GUIDE

# Mitel OpenScape Contact Center V12

Agent Portal Lite V12

Agent Portal

User Guide

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# 1 About this operating manual

This user guide describes how to use Agent Portal Lite. All work steps required to use this application are shown clearly and user-friendly.

## 1.1 Terms and typographical styles

### 1.1.1 Formatting

The table below describes the text formatting styles used in this operating manual and what they mean.

| Formatting                 | Meaning   |
|----------------------------|---|
| <b>Bold</b>                | User interface elements that are clicked, selected and/or enabled, i.e. normally buttons, checkboxes, option buttons, menu items                      |
| "Quotation marks"          | User interface elements normally called by their name, i.e. normally names of dialog windows, other windows, icons, fields, work areas, tabs, columns |
| <b><i>Bold italics</i></b> | Database names, variables, file names   |
| UPPERCASE                  | Keys (SHIFT, CTRL, ALT)   |
| <i>Italics</i>             | Commands and examples   |
| Courier                    | Output texts and error messages, parameters, source texts   |

Table 1 *Typographical styles*

### 1.1.2 Terminology

The following terms describe activities that are performed using the keyboard or mouse, as well as states of the command buttons on the screen.

| Term         | Meaning  |
|--------------|--|
| Press        | Press a keyboard key.                                  |
| Enter        | Type in letters, digits, database names, variables.    |
| Enter        | Press the acknowledgement key (ENTER or Return Key).   |
| Double click | Press the left mouse button twice in quick succession. |

Table 2 *Terminology*

| Term                           | Meaning  |
|--------------------------------|--|
| Right-click/right mouse button | Press the right mouse button once.   |
| Select or highlight            | Click on an element once with the left mouse button.   |
| Drag                           | Select an object and then press and hold the left mouse button while moving the object to a new position.  |
| Drop                           | Release the left mouse button to let go of the dragged object. This step always follows a "drag".  |
| Active/enabled                 | Active commands are displayed on the screen in black text, which means that they are now available to the user. Active symbols are displayed in their normal colors when they are available. |
| Deactivated/not released       | Deactivated commands and symbols are displayed in gray, which means that they are not available to the user.   |
| Button/icon                    | Button for triggering functions.   |

Table 2 Terminology

### 1.1.3 Note

The following notes are used in this operating manual:

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**Note:** Indicates useful information important for the workflow.

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**Important:** Indicates a situation that may cause functional malfunctions or material damage.

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## 1.2 List of abbreviations

| Abbreviation | Meaning                                   |
|--------------|---|
| GUI          | Graphical User Interface                  |
| HSB          | Hue, Saturation, Brightness - color space |
| OSCC         | OpenScape Contact Center                  |
| RGB          | Red, Green, Blue - color space            |
| SW           | Software                                  |

Table 3 Abbreviations in this operating manual

## About this operating manual

### List of abbreviations

| Abbreviation | Meaning                |
|--------------|------------------------|
| UC           | Unified Communications |

Table 3

*Abbreviations in this operating manual*

## 2 Agent Portal - Brief Introduction

Agent Portal Lite is a web application which was designed to be used on a mobile device. Agent Portal Lite allows OpenScape Contact Center agents to login to Voice media and use their mobile number as preferred device. For Agent Portal Lite there is no need for firewall configuration, you can access it through a browser on mobile phone.

Agent Portal Lite enables the agents to control various phone functions such as:

- Logon and Logoff to Voice media
- Set agent available and unavailable
- Modify extension
- Manage preferred device (add/edit/remove/select).

# 3 Starting Agent Portal Lite

## 3.1 Initial start-up

### Prerequisites

Agent Portal Lite is a web-based mobile application. In order to use it, you need access to a web-browser on a mobile phone. You can use the following web-browsers:

- Google Chrome
- Mozilla Firefox
- Microsoft Edge Chromium

### Procedure

1. Enter the address of the web page in the address line of your browser, e.g.

```
https://<OSCC_ApplicationServer_hostname_or_ip>/agentportallite
```

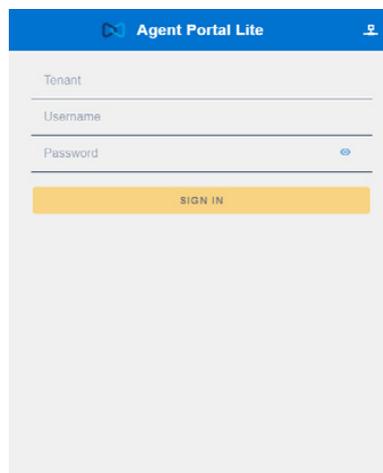
The Agent Portal Lite main window opens.

2. For more information on how to login to Agent Portal Lite, see [Section 3.2, "Logging in to Agent Portal Lite"](#).

## 3.2 Logging in to Agent Portal Lite

### Prerequisites

The "Login" window is displayed when you navigate to Agent Portal Lite url:

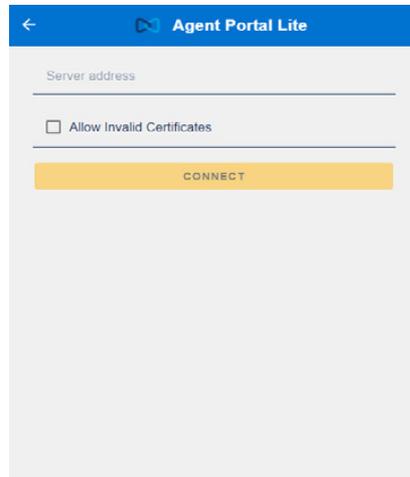


The screenshot shows a mobile application interface for logging in. At the top, there is a blue header bar with the text "Agent Portal Lite" and a small download icon on the right. Below the header, there are three input fields: "Tenant", "Username", and "Password". The "Password" field has a small eye icon to its right, indicating a toggle for visibility. Below these fields is a prominent yellow button with the text "SIGN IN" in black capital letters. The background of the form is a light gray color.

### Procedure

1. After the first login, a new window will be displayed, where you need to configure the server address. Your selection will be stored for future logins, For example:

```
https://<OSCC_ApplicationServer_hostname_or_ip>/  
osccwebservice
```



2. After setting up the server address, enter the tenant, that has been assigned to you. The selection will also be stored for future logins.
3. Next step is to enter User name and Password in the relevant fields.
4. Click **Sign in**.
5. The main window of Agent Portal Lite is displayed.

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**Important:** The only available language is English.

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**Note:** If the agent is already logged in the Agent Portal Web, it will not be possible to login the Agent Portal Lite.

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**Note:** If the agent is already logged in the Agent Portal Lite on a mobile device and tries to login in on another mobile device, the agent will be notified that his/her username is already logged in on another device. The agent will be presented with the choice to logout on the old mobile device, in order to allow logging in on the new mobile device.

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## Starting Agent Portal Lite

Logging out of the Agent Portal Lite

### 3.3 Logging out of the Agent Portal Lite

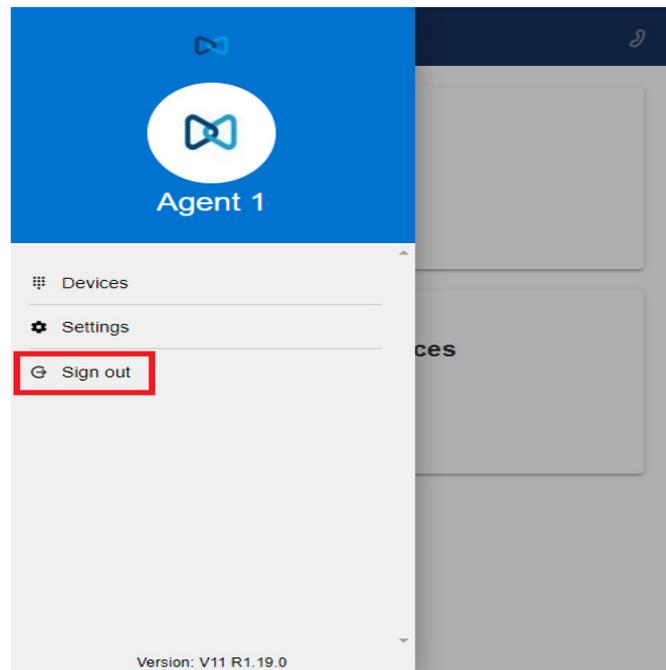
It is not possible to be logged in both the Agent Portal Web and Agent Portal Lite, at the same time. The agent must log out of the Agent Portal Lite before trying to login on another agent application (e.g Agent Portal Web).

#### Prerequisites

The agent must be logged in Agent Portal Lite.

#### Procedure

1. Click on the Functions icon, then click on the Sign out option.



## 4 User interface and basic configuration

### 4.1 Header and Functions



#### 1. Functions

Click on the Functions icon. This will display a drop down list with the following functions:

- Devices
- Settings
- Sign out

#### 2. Routing status

In this area you can see and change your current status. You can choose between Available, Unavailable, Work and Logoff.

#### 3. Logon the Voice media

Click on the Voice icon to logon/logoff Voice media.

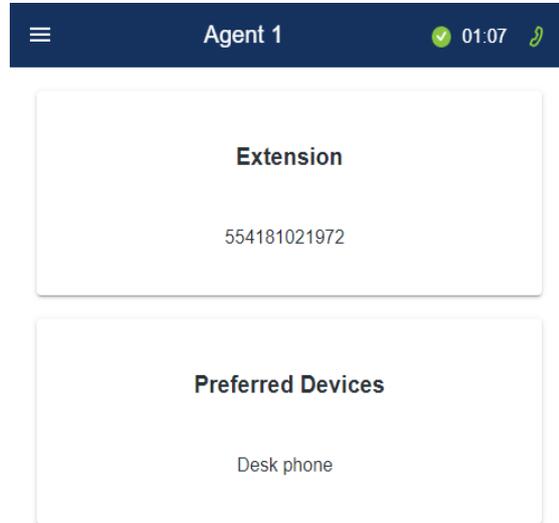
### 4.2 Dashboard

After logging in the application, the agent will see:

- Taskbar with the following icons:
  - Functions icon - which will display a drop down menu, with the following options: Devices, Settings and Sign out.
  - Logon to voice icon.
  - Routing state icon - when logged on to voice, the agent can select one of the following statuses: Available, Unavailable, Work and Logoff.
  - Time indication - this indicates for how long the agent has been in the current routing state.
- Extension button, with the current configured extension.
- Preferred Device button, indicating the current selected Preferred Device.

## User interface and basic configuration

### Dashboard



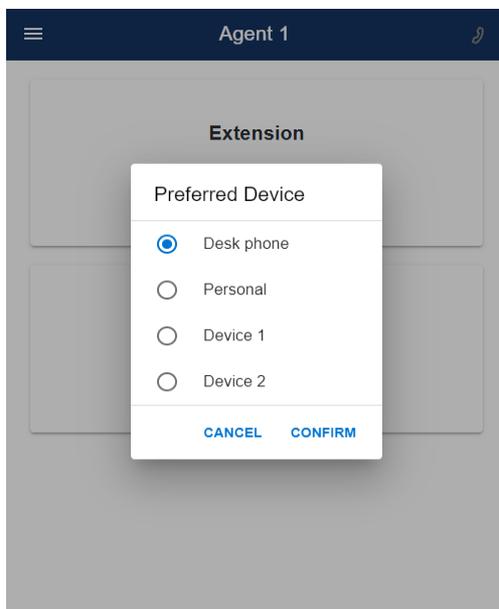
### 4.2.1 Extension

By clicking the Extension button, the Change Extension window is opened, revealing the Extension field. A confirmation icon is presented on the right side of the top bar.



## 4.2.2 Preferred Device

Clicking the Preferred Device button, will display a Preferred Device pop up, with a list of configured Devices. The agent can select the desired Preferred Device from the list, as well as unselect it. The agent can Confirm or Cancel the configuration.



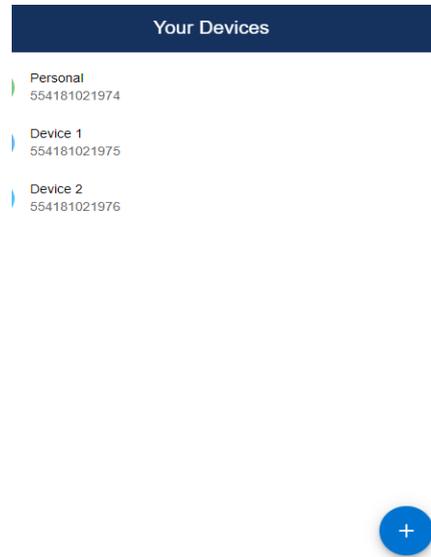
## 4.3 Functions

### 4.3.1 Devices

In this tab you can see a list of available devices. You can add, edit and remove the devices from the list. Agent Portal Lite allows changing your device without needing to exit the application.

## User interface and basic configuration

### Functions



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**Note:** The telephone number specified when configuring a new device, must have dialable or canonical format.

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**Note:** It is not possible to edit a device that is currently set as the preferred device.

---

#### 4.3.1.1 Add device

##### Prerequisite

The Devices work area needs to be opened.

##### Procedure

1. Click on + button. A pop-up window will be displayed.
2. Type a name for the device you want to add (e.g. Desk phone) and its number. Click on the confirmation icon on the top bar. As a result, your device will be added to the list. You can now use/change the Preferred Device to the newly created device, from the Dashboard area of the Agent Portal Lite.

### 4.3.1.2 Edit device

#### Prerequisite

The Devices work area needs to be opened.

#### Procedure

1. Click on the device you wish to edit.
2. A pop-up window is displayed.
3. Edit the entries of your choice.
4. Click on confirmation icon on the top bar.

### 4.3.1.3 Remove device

#### Prerequisite

The Devices work area needs to be opened.

#### Procedure

1. Click on the device you wish to edit.
2. Click on 
3. A pop-up is presented, with the options to confirm or cancel the removal of the device.
4. Click the **Ok** button

The device is removed.

## 4.3.2 Settings area

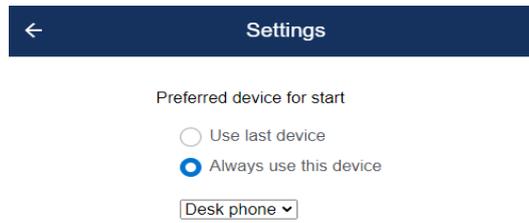
The settings and preferences of the Agent Portal Lite can be adjusted from the Settings area. From there, it is possible to configure::

- Preferred device to start, with the options:
  - Use last device

## User interface and basic configuration

### Functions

- Always use this device - the agent must select which device to use from a combo box.



Settings

Preferred device for start

Use last device

Always use this device

Desk phone ▾

## 5 Contact center functionality

### 5.1 Logging on and off from the OpenScape Contact Center

#### 5.1.1 Logon

##### Manual logon

1. Log on to the Voice media using media button:
  - You can use the icon  on the header of Agent Portal Lite to logon to Voice media. After clicking the icon you are logged on to Voice media and your routing status is set to “Unavailable”.

---

**Note:** The color of the medium icon changes to green when you logon to it.

---

#### 5.1.2 Logoff

##### Procedure

- Logoff from voice media using routing status icon:
  1. Click on the routing status icon.  
A menu will be displayed.
  2. From the menu select **Log off**.  
You are now logged off from all media.
- Log off from the media, using Voice media icon:

You can use the Voice media icon on the header of Agent Portal Lite to log off.

---

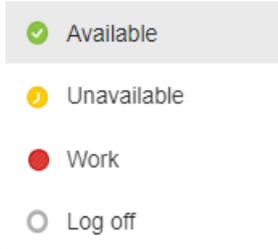
**Note:** The color of the medium icon changes to grey when you log off from it.

---

## 5.2 Working with OpenScape Contact Center

### 5.2.1 About routing states

Once you have successfully logged in to the Contact Center system, your routing state indicates whether you are able to receive a new contact or not. The routing states are **Available**, **Unavailable**, and **Work**. Next to the states, there is a timer, which indicates the total amount of time in that particular state.



The following table shows the effect of each routing state on the ability to receive routed contacts:

| Button | Routing state | Description   |
|--------|---------------|---|
|        | Available     | You are logged on to Voice media and you are free to receive routed contacts.   |
|        | Unavailable   | You are logged on to Voice media, but you are not available to handle routed contacts because you might be on a break.  |
|        | Work          | You are logged on to Voice media but you are performing a work-related task, not associated with a contact, and are not available to handle routed contacts. For example, you might be attending a meeting or a training session. |

Table 4 Routing states

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**Important:** The Post-processing state is not visible on the Agent Portal Lite. It is not possible to exit Post-processing state, without timeout. It is recommended to disable Post-processing for agents using Agent Portal Lite.

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**Important:** It is not possible to handle with Wrapup reason. Mandatory Wrapup must be disabled for agents using Agent Portal Lite.

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## 5.3 Preferred device functionality

### 5.3.1 Changing preferred device

In Agent Portal Lite you are able to set up multiple devices to use. Refer to [Section 4.3.1, “Devices”](#) for further information on how to set up and manage your devices.

After setting up your devices, you can easily switch to the desired one.

#### Procedure

1. Click on the device area, located in the main window of Agent Portal Lite.
2. From the pop-up list that appears select the desired preferred device. As a result, your preferred device will be changed.

## 6 Microsoft Teams integration

Microsoft Teams integration provides a way to open an Agent Portal Lite interface which allows the MS Teams user to control the Routing Status and enable the Preferred Device feature in such a way that an agent can use Teams to receive or make calls via the OSCC Preferred Device feature.

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**Note:** For the deployment of the MS Teams integration, please refer to the System Management Guide.

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### 6.1 Agent Portal Lite setup

To have the Agent Portal Lite setup embedded in the MS Teams, follow the steps below:

1. Login to MS Teams with a user account, for example by accessing:  
<https://teams.microsoft.com/>
2. Navigate to the **Apps** tab and click on the uploaded app.
3. Click **Add** for the first time or **Open** for the next attempts.

Agent Portal Lite will be opened inside of the MS Teams.

From this point on, the Agent Portal Lite app is embedded in the MS Teams.

