

# Pointspan Assistant Installation and User Guide



First Edition  
2822-001  
V5.3

**Pointspan**

**AASTRAS**



## **1st Edition (February 10, 2009)**

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## **Revision History**

The following represents the revision history of this publication:

*Proprietary and Contents Section*

<b>Revision Number</b>	<b>Date Completed</b>	<b>Point of Contact</b>	<b>Description</b>
2822-001	04.2009	Bev Marsh	Description and procedures for installing and using the Pointspan Assistant.

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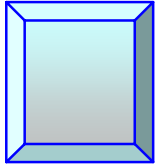
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## About This Publication

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### Overview

This publication describes the Pointspan Assistant

### Audience

This publication is intended for both administrators and users of the Pointspan Assistant.

### Organization

This publication contains the following chapters.

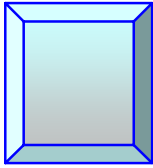
Chapter, Topic	Description
<a href="#">Chapter 1, Introduction</a>	Describes the Pointspan Assistant
<a href="#">Chapter 2, Pointspan Database</a>	Describes the Pointspan database required.
<a href="#">Chapter 3, Install the Pointspan Assistant Server Software</a>	Procedures for installing the Pointspan Assistant server software.
<a href="#">Chapter 4, Optional System-wide Customization</a>	Procedures for customization of the Assistant at a system-wide level.
<a href="#">Chapter 5, Install the Pointspan Assistant Client Software</a>	Procedures for installing the Pointspan Assistant client software.
<a href="#">Chapter 6, Customize the Pointspan Assistant</a>	Procedures for customizing the Pointspan Assistant on the desktop.
<a href="#">Chapter 7, Use the Pointspan Assistant</a>	Procedure for using the Pointspan Assistant.

### References

The following publications provide related information.

Publication Number	Title	Description
2808-nnn	Pointspan 5.3 Features and Enhancements	Pointspan 5.3 Features and Enhancements
2755-nnn	SPN Database	Procedures for installing SIP phones and SPN database.





# Chapter 1 Introduction

## Overview

The Pointspan Assistant is a Windows-based application that allows control of Pointspan features and functions in conjunction with an SPN-based softphone. The Assistant functions in the same way as the Aastra SIP phones.

The Pointspan Assistant is a separate application from the softphone. It provides the user with functions that are not provided by the softphone functionality, such as ACD agent functions, Call Park, and Do Not Disturb.

The figure below of the Pointspan Assistant shows the installed softphone in an “Offline” state. The button is shows a different color that is equivalent to the Sign On/Off key lamp turned on.

**Figure 1. The Pointspan Assistant**



## Purchasable Feature

The Pointspan Assistant is a purchasable feature requiring a license for the SIP softphone plus an additional license for the Assistant itself. These licenses are activated by the Aastra Customer Support Center (CSC) after purchase. These licenses are tracked by Pointspan under SPAR System Parameters (SIP and TBR) via the Man/Machine console.

### SPAR Parameters

```
MRG...# MULTI-RING NBRS IN USE/LICENSED..00002/00100
SIP...# SIP DEVICES IN USE/LICENSED.....00032/00256
TBR...# SIP TOOLBARS IN USE/LICENSED.....00002/00256
BLF...SIP BLF RESOURCES IN USE/EQUIPPED..00007/05000
SNL...# SNMP MANAGER PORTS LICENSED.....4
```

## Remote Agents

The Assistant does not operate behind devices using Network Address Translation (NAT). Remote agents must use a VPN connection to access the local corporate network where the SPN operates in order for the Assistant to function properly.

## Pointspan Assistant Functions

The Pointspan Assistant provides the same functionality that is available on SPN SIP phones. The Assistant controls the following functions and requires knowledge of the functions of the ACD agent phone.

- Agent Sign On/Off
- Work/Wrap
- Unavailable
- Agent Statistics
- Queue Depth
- Centergy Reporting® OAI functions:
  - Transact
  - Supervisor Alert
  - Message Recall
- Do Not Disturb (if allowed and the agent is not online)
- Call Park

**Note**

The softphone does not reflect the ACD states.

## Pointspan Assistant Configuration Levels

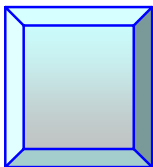
The Pointspan Assistant is configured at three separate levels:

- Administrator – Using the Pointspan database.
- Administrator – Using the Configuration files.
- User – After installation, using the Assistant’s configuration menus.

The Assistant reads the three configuration files from the configuration server (TFTP or FTP) in the following order:

1. AastraToolbar.cfg – The configuration file containing settings specific to the Pointspan Assistant. This configuration file is in the same format as the standard configuration file, but contains different tags. It resides on the configuration server.
2. aastra.cfg – The global SIP phone configuration file on the configuration server.
3. <portnumber>.cfg – The configuration file for the softphone phone generated from the Man/Machine FONE command. It resides on the configuration server.

If any setting is in multiple files, only the entry in the last file read will go into effect.



## Chapter 2 Pointspan Database

---

### Agent Softphone

The Pointspan Assistant allows control of Pointspan features and functions in conjunction with an SPN based softphone. The Assistant functions in the same way as the Aastra SIP phones.

Currently Aastra supports two different softphones from Counterpath that operate with the Pointspan Assistant and the PointSpan SPN. One is the Counterpath X-Lite phone which is a limited-function softphone and a free download from the Counterpath website. The other is the Counterpath Bria Pro phone which is licensed through Aastra and provides a more streamlined interface with better call and contact management features.

### Build the ACD Agent Softphone

The following Pointspan database is required for the ACD softphone.

- BTNS Command – Build a generic SIP button template.
- AGID Command – Build the ACD agent ID.
- LINE Command – Build the ACD line.
- FONE Command – Build the phone.

#### BTNS

The Assistant feature buttons are assigned as softkeys (SKEYs) in the generic SIP template.

```

SELECT COMMAND => btns
SELECT MODE: PRINT, DISPLAY, UPDATE, SEARCH, TITLES => u
SELECT MODE: C-Create; M-Modify or D-Delete.. => c
SPECIFY TEMPLATE NUMBER:..... => 68
TEMPLATE TYPE: N=NORMAL; B=BRI; S=SIP.....N => S
ENTER TITLE:..... => Generic for PS Assistant
SIP PHONE TYPE: OR ?..... => ?
GNRC.....GENERIC SIP
GNRX.....GENERIC SIP - EXTENDED LINES
480.....AASTRA 480i
480C.....AASTRA 480i CT
6731.....AASTRA 6731i
6753.....AASTRA 6753i
6755.....AASTRA 6755i
6755S.....AASTRA 6755i M670i
6755L.....AASTRA 6755i M675i
6757.....AASTRA 6757i
6757C.....AASTRA 6757i CT
6757S.....AASTRA 6757i M670i
6757L.....AASTRA 6757i M675i
6757CS.....AASTRA 6757i CT M670i
6757CL.....AASTRA 6757i CT M675i
9133.....AASTRA 9133i
9143.....AASTRA 9143i (A33i)
9480.....AASTRA 9480i (A35i)
9480C.....AASTRA 9480i CT (A35i CT)

SIP PHONE TYPE: OR ?..... => gnrc
**
** LINE/CALL APPEARANCE ASSOCIATIONS
L1 TYPE: S=Sel.....S => s
L2 TYPE: S=Sel; U=Unas; Appear or ?...UNAS => call
.
.
SKY-1 TYPE: U=Unas; Lx; Feature or ?...UNAS => ?

AGUN..Agent Unavailable          ASTS..ACD - Agent Statistics
CREC..Call Record                DNDB..Do Not Disturb
OAI 1..OAI Feature 1             OAI 2..OAI Feature 2
OAI 3..OAI Feature 3             OAI 4..OAI Feature 4
OAI 5..OAI Feature 5             OAI 6..OAI Feature 6
OAI 7..OAI Feature 7             OAI 8..OAI Feature 8
OFFL..Agent Sign-on             PARK..Call Park
QUEU..ACD - Queue Depth          WRAP..Agent Work/Wrap

SKY-1 TYPE: U=Unas; Lx; Feature or ?...UNAS => offl
SKY-2 TYPE: U=Unas; Lx; Feature or ?...UNAS => wrap
SKY-3 TYPE: U=Unas; Lx; Feature or ?...UNAS => agun
SKY-4 TYPE: U=Unas; Lx; Feature or ?...UNAS => asts
SKY-5 TYPE: U=Unas; Lx; Feature or ?...UNAS => crec
SKY-6 TYPE: U=Unas; Lx; Feature or ?...UNAS => queu
SKY-7 TYPE: U=Unas; Lx; Feature or ?...UNAS => dndb
SKY-8 TYPE: U=Unas; Lx; Feature or ?...UNAS => park
SKY-9 TYPE: U=Unas; Lx; Feature or ?...UNAS => oai2
SKY-10 TYPE: U=Unas; Lx; Feature or ?...UNAS => oai4
SKY-11 TYPE: U=Unas; Lx; Feature or ?...UNAS => oai6
.
.
SKY-20 TYPE: U=Unas; Lx; Feature or ?...UNAS =>

*** VERIFY/DISPLAY ***

```

Line and Call Appearance for the softphone associated with the Pointspan Assistant.

These features can be assigned to any of the Pointspan Assistant toolbar buttons.

## AGID

Create the agent ID that will be used for the line. To create the AGID you will need to know what ACD pilot to assign the ACD softphone agent.

```
** AGENT IDENTIFICATION DEFINITION          10/29/08  14:01:34
AID...AGENT IDENTIFICATION.....3299
UGP...USER GROUP.....1
***...CALL CENTER NUMBER.....1
***...AGENT STATUS.....IDLE
***...CURRENT VOICE LINE.....3299 /1
PLT...HOME ACD PILOT DIRECTORY NUMBER....6100
PSW...AGENT PASSWORD.....NONE
AVL...ASSOCIATED VOICE LINE DIRECTORY....3299
NME...AGENT NAME.....
WUP...WRAP-UP ALLOWED.....YES
AIP...AGENT IDLE QUEUE PRIORITY.....0
DAS...DYNAMIC AGENT SIGNON.....NOT ALLOWED
RAG...ROAMING AGENT.....NO
```

Team Membership:  
NONE

## LINE

Build the ACD line using the LINE command. The line is a normal ACD line.

```
** VOICE LINE DEFINITION                    10/29/08   13:58:03
DRN...DIRECTORY NUMBER.....3299
UGP...USER GROUP NUMBER.....1
COS...CLASS OF SERVICE.....1
CPG...CALL PICKUP GROUP NUMBER.....NONE
HNC...HOME NNP NUMBER.....525
AAL...ACD AGENT LINE.....YES
ACD...HOME ACD PILOT NUMBER.....6100 /1
***...CURRENT ACD PILOT.....6100 /1
WUP...WRAP-UP ALLOWED.....YES
AIP...AGENT IDLE QUEUE PRIORITY.....1
ASO...AGENT AUTO-SIGNON.....3299
HUN...HUNT PILOT NUMBER.....NONE
***...ANONYMOUS CALLER REJECTION.....OFF
OAM...OAI ASSOCIATED MEMBER.....YES
APR...AUTOMATIC PRIVACY RELEASE.....NO
CAD...100 NUM ABBREVIATED DIALING.....NO
DIA...STATION DIAGNOSTIC ALLOWED.....NO
UDO...DIRN NAME/NUMBER DISPLAY OPTION....BOTH NUMBER & NAME
ALLOWED
FIE...CALL FORWARD - INTERNAL/EXTERNAL...NO
CFN...CALL FORWARD - NO ANSWER.....INACTIVE
CFB...CALL FORWARD - BUSY.....DELAYED
.....BUSY DIRECTORY NUMBER.....6205
CFA...CALL FORWARD - ALL.....INACTIVE
HOT...HOT LINE DIRECTORY NUMBER.....INACTIVE
OHA...OFFHOOK ALERT DESTINATION NUMBER...INACTIVE
TOD...TIME OF DAY RESTRICTIONS.....NO
VID...InteMail ID FOR VOICE LINE.....NONE
```

```
PIN...PERSONAL IDENTIFICATION NUMBER.....NONE
CNC...NATIONAL CALLING PARTY # CONTENTS..USER GROUP
CNI...USER GROUP CALLING PARTY #.....2 = 469-365-3000
INN...INSIDE CALL, NAME/NUMBER FIRST....NAME
ONN...OUTSIDE CALL, NAME/NUMBER FIRST....NUMBER
STATION      TYPE  BUTTON      RING OPTION

011.1.02.16 GNRC   LN1         RING          InteMail-MSG
DISP AGENT-ACD

OAI1 OAI2 OAI3
OAI4
BLF APPEARANCES (Station & Key):

END OF DISPLAY
```

## FONE

Build the generic port using the FONE command. Enable the new ACD “toolbar” option TBR. This creates a <portnumber>.cfg configuration file for the Assistant that is sent to the TFTP server. This configuration file is used when setting up the Assistant configuration.



```

SELECT COMMAND => fone
SELECT MODE: PRINT, DISPLAY, UPDATE => d
ENTER LOCATION, WORK AT HOME or ?..... => 11.1.2.16

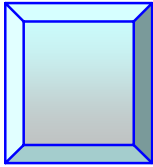
DISPLAY FORMAT: N, D or ?.....D => d
** STATION DEFINITION:          05/07/09 15:53:36

***...STATION.....PORT: 011.1.02.16
***...STATION EQUIPMENT TYPE.....SIP
***...<mac>.CFG FILE VERSION.....On File=05/07/09 15:23:04
                               In Use=10/22/08 11:38:46

SPT...SIP PHONE TYPE.....GENERIC SIP
BTP...BUTTON TEMPLATE NUMBER.....111
TBR...TOOLBAR ENABLED .....YES ← New Toolbar option for the
SUG...STATION USER GROUP NUMBER.....1                               Pointspan Assistant
OAM...OAI ASSOCIATED MEMBER.....YES
DND...DO NOT DISTURB ALLOWED.....YES
DNS...DO NOT DISTURB STATUS.....INACTIVE
VMC...InteMail MESSAGE DESK OPERATOR....NO
EAC...EMERGENCY ASSOCIATED CPN.....NONE
MWS...MSG-WAITING IND (MWI) SUBSCRIPTION.IMPLICIT
SGF...ASSOCIATED SIP GATEWAY #.....NONE
RMT...REMOTE SIP STATION.....NO
SAD...VALIDATE SIP AUTHENTICATION PSWD..YES
SPW...SIP AUTHENTICATION PASSWORD.....12345
     ...CURRENT PASSWORD VERSION.....1
BLA...BLA SUPPORTED.....YES
RETURN CONTINUES DISPLAY..... =>
LINE      TYPE      LINE ASSIGNMENT
L1.....LINE SELECT...DRN:3299  -UGP:1...RING      Mail-MSG DISP AGENT
           OAI1 OAI2 OAI3 OAI4
L2.....UNASSIGNED.....
L3.....UNASSIGNED.....
L4.....UNASSIGNED.....
L5.....UNASSIGNED.....
L6.....UNASSIGNED.....
L7.....UNASSIGNED.....
L8.....UNASSIGNED.....
L9.....UNASSIGNED.....
SOFT KEY # TYPE      FEATURE ID
1.....FEATURE.....Agent Sign-on
2.....FEATURE.....Agent Work/wrap
3.....FEATURE.....Agent Unavailable
4.....FEATURE.....ACD - Agent Statistics
5.....FEATURE.....ACD - Queue Depth ← Features available for the
6.....FEATURE.....Call Park                               Pointspan Assistant toolbar
7.....FEATURE.....OAI Feature 2                          buttons
8.....FEATURE.....OAI Feature 3
9.....FEATURE.....OAI Feature 6
10.....FEATURE.....Do Not Disturb
11.....FEATURE.....UNASSIGNED
RETURN CONTINUES DISPLAY..... =>
12.....FEATURE.....UNASSIGNED
13.....FEATURE.....UNASSIGNED
14.....FEATURE.....UNASSIGNED
15.....FEATURE.....UNASSIGNED
16.....FEATURE.....UNASSIGNED
17.....FEATURE.....UNASSIGNED
18.....FEATURE.....UNASSIGNED
19.....FEATURE.....UNASSIGNED
20.....FEATURE.....UNASSIGNED
END OF DISPLAY

```





## Chapter 3 Install the Pointspan Assistant Server Software

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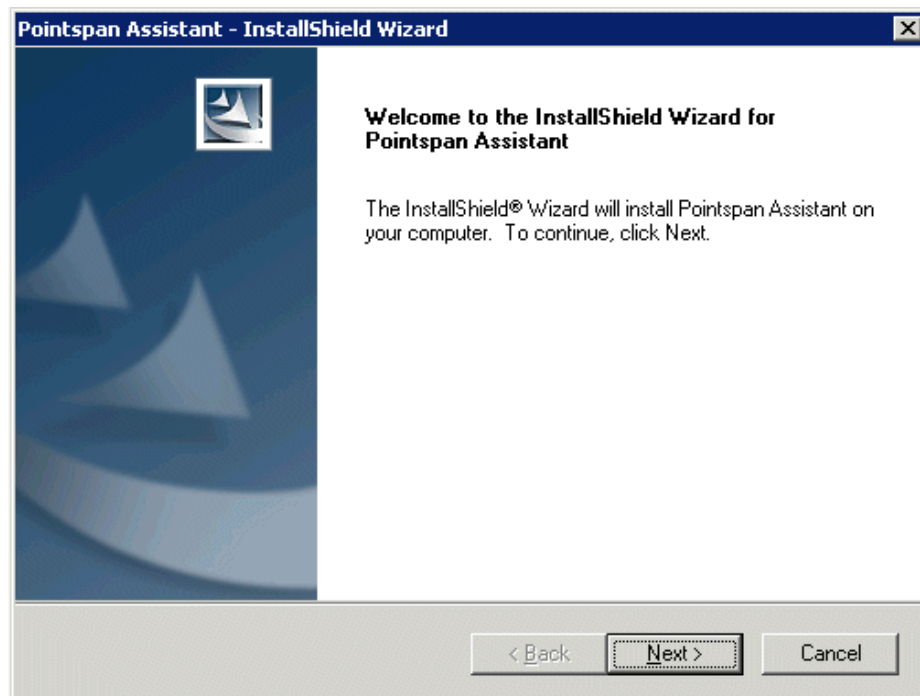
### Install the Pointspan Assistant Server Software

The Pointspan Assistant is designed to be installed from a webpage link supplied to the agent. The site administrator installs the server software which sets up the internal webpage using a Windows server running Internet Information Services (IIS). The recommended configuration is to use the SPN XML server where IIS is already installed and is ready to install the Assistant setup software.

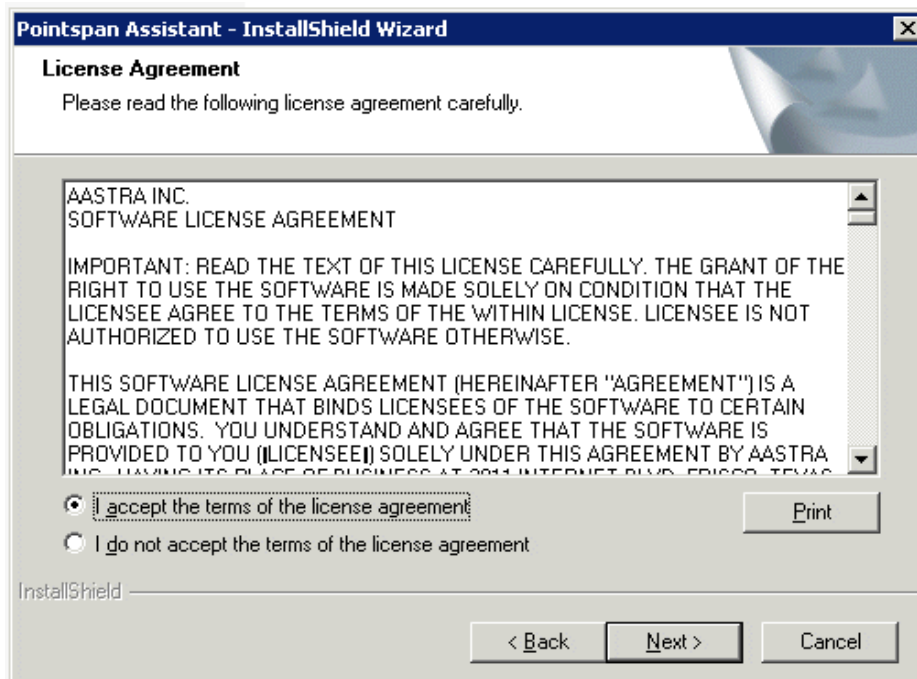
#### Note

End users PCs that use the Pointspan Assistant and a softphone will be required to have access to the SPN's corporate network interface either by VLAN and/or IP routing.

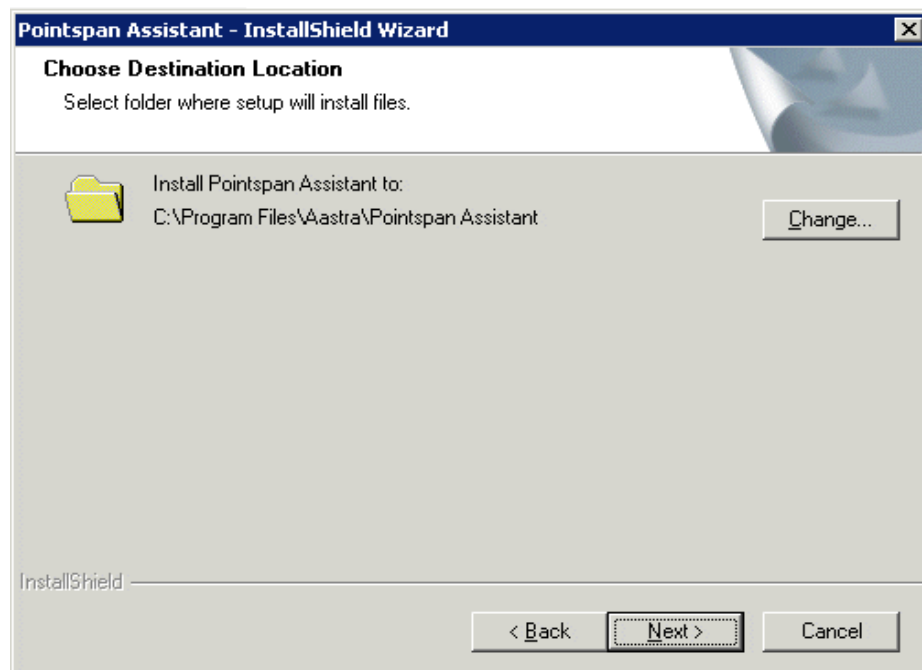
1. Log into a server account with administrator privileges.
2. Verify the IIS is installed and running on the server. (Click **Start >Administrative Tools > Internet Information Services (IIS).**)
3. Go to the PointspanAssistant 1.0.1.nn Install directory.
4. Run “**setup.exe**”. The following window displays.



5. Click **Next**. The *License Agreement* window displays.

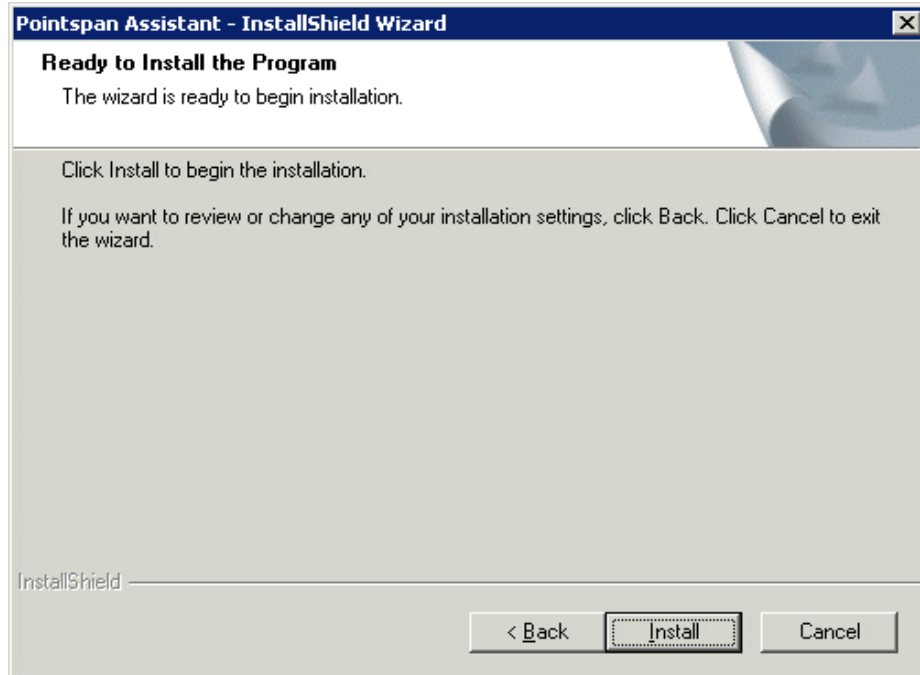


6. Accept the terms of the license.
7. Click **Next**. The *Choose Destination Location* window displays.

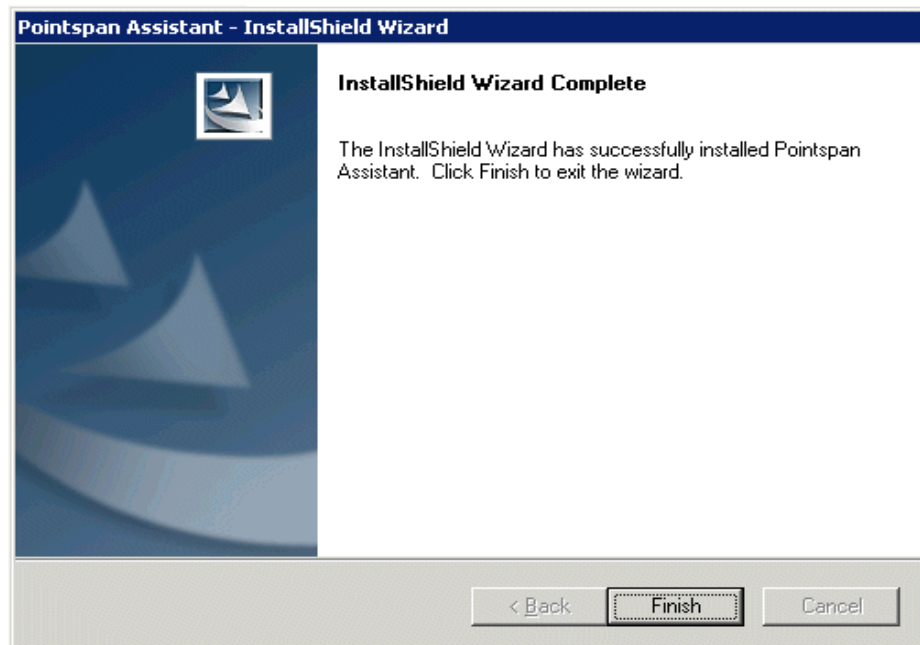


8. Decide where you would like the installed file to reside on the server.

9. If the server is an SPN XML server with a D drive, change the drive to D: by clicking the “**Change**” button. The Choose Folder dialog box displays.
10. Choose **D:\Program Files\Aastra\PointspanAssistant** as the path.
11. Click **OK**. The *Ready to Install the Program* window displays.

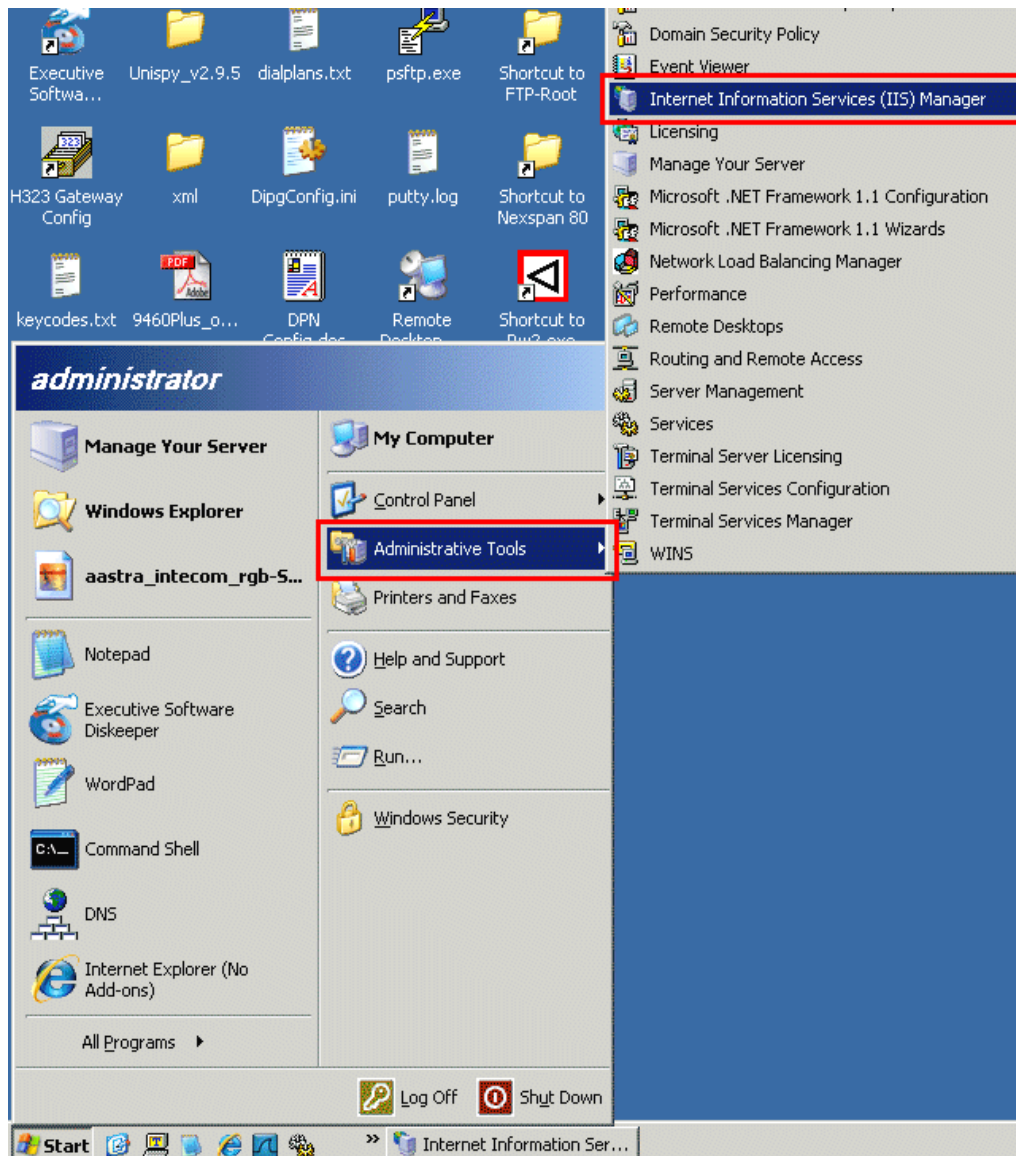


12. Click **Install**. When the installation is complete, the *InstallShield Wizard Complete* window displays.

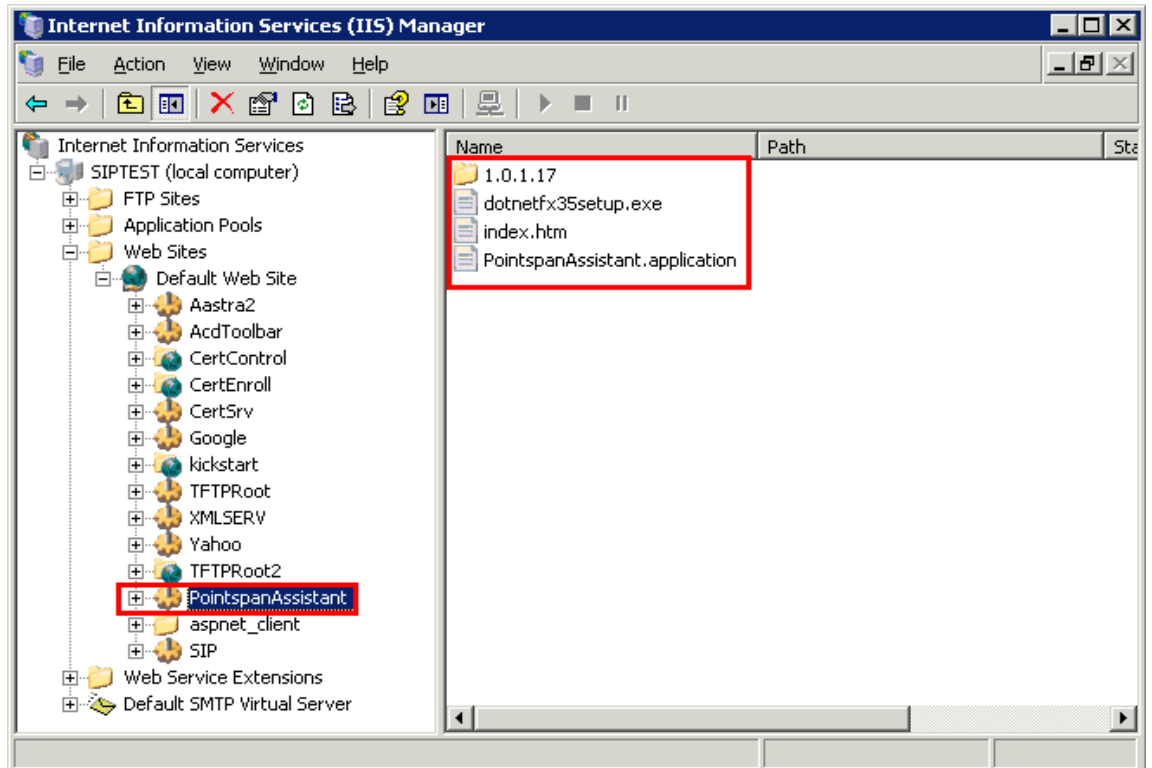


## Verify the Pointspan Assistant Subdirectory

1. Click **Start=>Administrative Tools=> Internet Information Services (IIS)**.

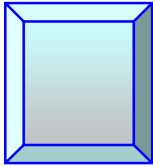


2. In the IIS window, look for the “PointspanAssistant” subdirectory under the “Default Web Site” as shown below.









## Chapter 4 Optional System-wide Customization

### Overview

The Pointspan Assistant can be customized system-wide using the configuration (.cfg) files on the configuration server (TFTP or FTP). You can change the colors and use a company logo as in the example below.



### AastraToolbar.cfg

#### Settings

The Pointspan Assistant settings go into the AastraToolbar.cfg file, but can also be placed in the Aastra.cfg or <portnumber>.cfg. These files reside in TFTProot.

#### The Default AastraToolbar.cfg

The following is the *default* configuration file.

#### Default AastraToolbar.cfg

```
###
# AastraToolbar.cfg - dated 10/23/2008
#
# NOTE 1: Color properties are defined by the .Net Color structure at:
# http://msdn.microsoft.com/en-us/library/
#     system.drawing.color_properties(VS.80).aspx
#
# NOTE 2: Key definitions are defined by the .Net framework at:
# http://msdn.microsoft.com/en-us/library/
#     system.windows.forms.keys.aspx
#
# NOTE 3: Hotkeys are globally assigned. If hotkeys are to be used
# then softkey<n> should be the same feature for all toolbar button templates.
###
# BACKGROUND COLOR
# Default: Black
toolbar color background:
# BORDER COLOR
# Default: DarkGray/Gray
toolbar color bezel outside:
```

Default AastraToolbar.cfg
<pre> toolbar color bezel inside: # <a href="#">BUTTON BACKGROUND COLOR</a> # Default: Gainsboro/Gold/SeaGreen/SkyBlue toolbar color button off: toolbar color button on: toolbar color button slowflash: toolbar color button fastflash:  # <a href="#">BUTTON FOREGROUND (text) COLOR</a> # Default: Black/Black/Black/Black toolbar color buttontext off: toolbar color buttontext on: toolbar color buttontext slowflash: toolbar color buttontext fastflash:  # <a href="#">VALIDATION CONTROL</a> # Options: # never = validation not performed. # always = every time the toolbar starts. # init = first time the toolbar starts after a MAC/Device ID change. # Default: init toolbar validate password:  # <a href="#">CUSTOM ICON FILENAME</a> # Default: internal Aastra Icon #toolbar custom icon:  # <a href="#">GLOBAL HOTKEY CONTROL</a> # Options: # on = hotkeys take effect even if the toolbar is in or out of focus. # off = hotkey only takes effect when the toolbar is in focus. # Default: on toolbar global hotkey:  # <a href="#">HOTKEY DEFINITION</a> # Range for &lt;n&gt;: 1-20. See NOTE 3 above. # Options: # hotkey = key label (e.g. F1, A, etc). See NOTE 2 above. ##toolbar softkey&lt;n&gt; hotkey:  # <a href="#">HOTKEY MODIFIER DEFINITION</a> # Range for &lt;n&gt;: 1-20. See NOTE 3 above. # Options: # hotkeymodifier = optional combination of Control, Shift, Alt, # and Win separated by a ' '. ##toolbar softkey&lt;n&gt; hotkeymodifier:                     </pre>

## How to Choose New Settings

The following table explains each setting in the AastraToolbar.cfg configuration file.

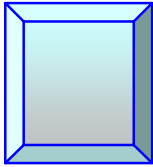
Settings Descriptions
<p><b>Note</b></p> <p>All color properties can use colors from the .Net Color structure defined here – <a href="http://msdn.microsoft.com/en-us/library/system.drawing.color_properties(VS.80).aspx">http://msdn.microsoft.com/en-us/library/system.drawing.color_properties(VS.80).aspx</a></p>
<p><b>BACKGROUND COLOR:</b></p> <p><b>toolbar color background: &lt;Color Name&gt;</b></p> <p>This is the background color for the form.</p>
<p><b>BORDER COLOR:</b></p> <p><b>toolbar color bezel outside: &lt;Color Name&gt;</b>  <b>toolbar color bezel inside: &lt;Color Name&gt;</b></p> <p>These are the two border colors. Depending on the choices the border can be made to look 3D or flat.</p>
<p><b>BUTTON BACKGROUND COLOR:</b></p> <p><b>toolbar color button off: &lt;Color Name&gt;</b>  <b>toolbar color button on: &lt;Color Name&gt;</b>  <b>toolbar color button slowflash: &lt;Color Name&gt;</b>  <b>toolbar color button fastflash: &lt;Color Name&gt;</b></p> <p>These are the background colors for the buttons (softkeys) for each 'LED' state sent by Pointspan.</p>
<p><b>BUTTON FOREGROUND (text) COLOR:</b></p> <p><b>toolbar color buttontext off: &lt;Color Name&gt;</b>  <b>toolbar color buttontext on: &lt;Color Name&gt;</b>  <b>toolbar color buttontext slowflash: &lt;Color Name&gt;</b>  <b>toolbar color buttontext fastflash: &lt;Color Name&gt;</b></p> <p>These are the text (foreground) colors for the buttons (softkeys) for each 'LED' state sent by Pointspan.</p>
<p><b>VALIDATION CONTROL:</b></p> <p><b>toolbar validate password: &lt;init, always or never&gt;</b></p> <p>This will cause the user to have to put in the sip line password from the &lt;portnumber&gt;.cfg file to validate the use of the toolbar. If the validate is set to never, no validation is done. If set to always, the validation is done every time the toolbar starts. If validate is set to init, the user will be asked the first time the toolbar start after the user changes the MAC/Device ID.</p>
<p><b>CUSTOM ICON FILENAME:</b></p> <p><b>toolbar custom icon: &lt;icon file&gt;</b></p> <p>This is a graphic file on the configuration server that is displayed on the toolbar. It allows a company to put their logo on the toolbar. The file should be a 40x40 pixel graphic file. It is recommended that the file be of type .ico (windows icon) or .png since both of these will allow transparent areas to allow for better blending into the background.</p>

Settings Descriptions
<p><b>GLOBAL HOTKEY CONTROL:</b></p> <p><b>toolbar global hotkey: &lt;on or off&gt;</b></p> <p>This setting allows the administrator to turn off the global hotkeys. If this is set to on, the hotkeys will take effect even if the toolbar is out of focus, but it will also take that hotkey combination away from all other applications. For example if you used Control-C and a hotkey combination, no application could use this for the standard copy function. If this is set to off, then the toolbar must be in focus for the hotkey combination to work.</p>
<p><b>HOTKEY DEFINITION:</b></p> <p><b>toolbar softkey &lt;n&gt; hotkey: &lt;key number&gt;</b></p> <p>This is the key for the hotkey (e.g. F1, A, etc).</p> <p>This should come from the Keys enumeration in the .net framework defined here:  <a href="http://msdn.microsoft.com/en-us/library/system.windows.forms.keys.aspx">http://msdn.microsoft.com/en-us/library/system.windows.forms.keys.aspx</a></p> <p><b>Note</b></p> <p>This is case sensitive. It should be the same case and spelling as defined in the enumeration above.</p>
<p><b>HOTKEY MODIFIER DEFINITION:</b></p> <p><b>toolbar softkey &lt;n&gt; hotkeymodifier: &lt;modifiers&gt;</b></p> <p>These can be any combination of Control, Shift, Alt, and Win separated by a ' '. If global hotkeys are off, this should only be a single modifier and Win is not allowed.</p> <p>For example if you wanted to have Control-Shift-F3, the hotkey would be set to F3 and the modifier would be set to Control   Shift.</p>

## User Level Configuration

See the following for configuration at the user level:

- [Configuration Settings](#)
- [Customize the Pointspan Assistant](#)



## Chapter 5 Install the Pointspan Assistant Client Software

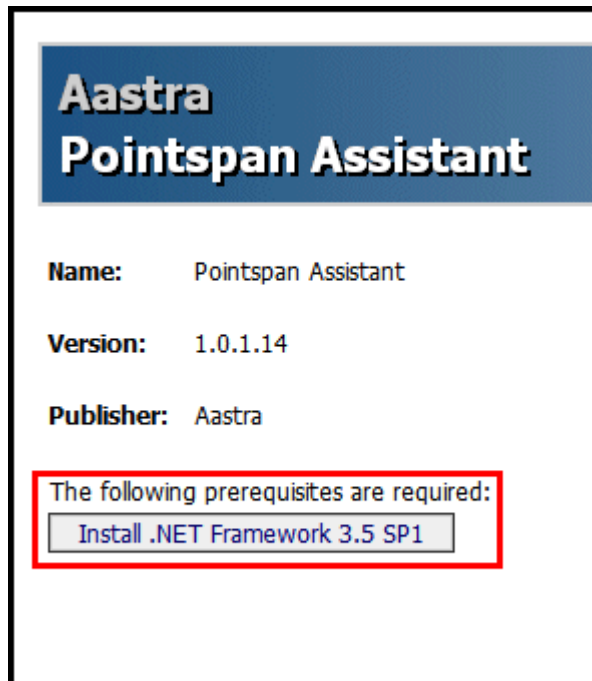
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### Install the Pointspan Assistant on the Client PC

1. Open a web browser window to the server using the URL *provided by the system administrator*:

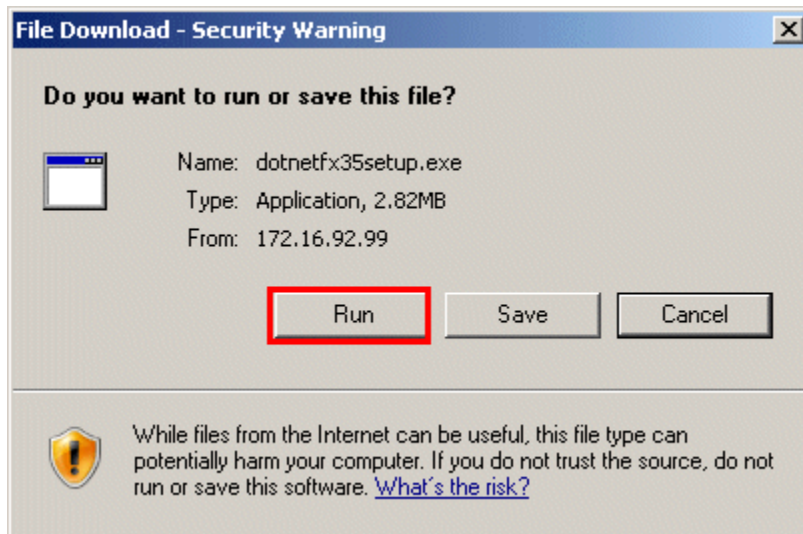
**http://<ip address or DNS name of server>/pointspanassistant/index.htm**

The following screen displays if your PC does not have the .NET Framework software installed.

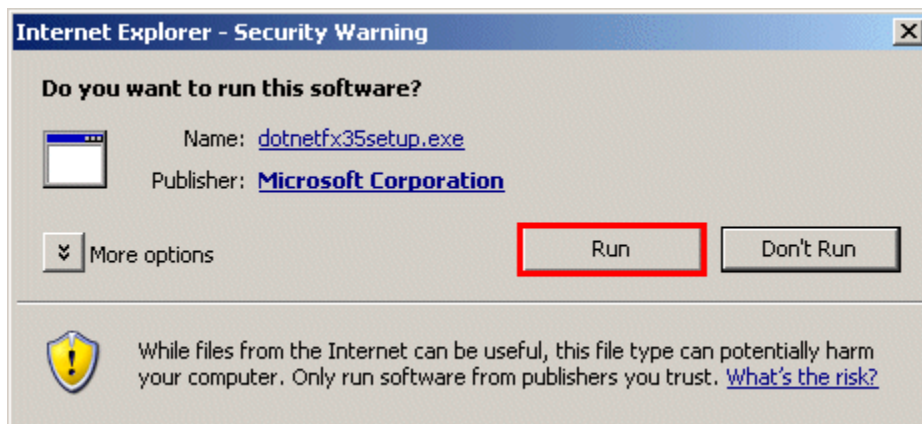


### Install the .NET Framework Software

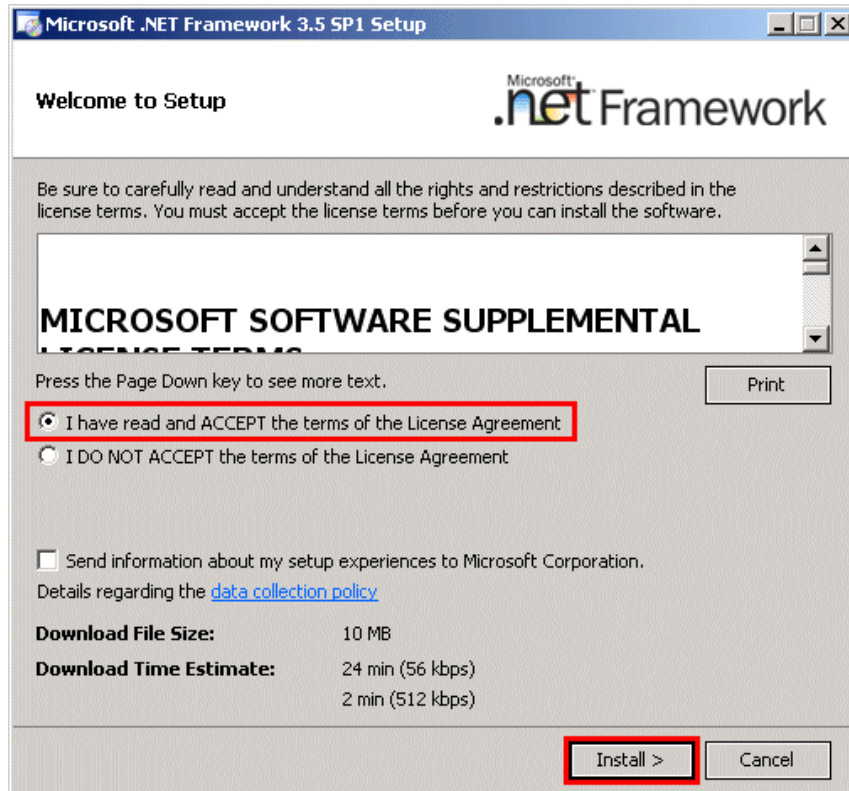
2. Click **Install .NET Framework 3.5 SP1** and the following window displays:



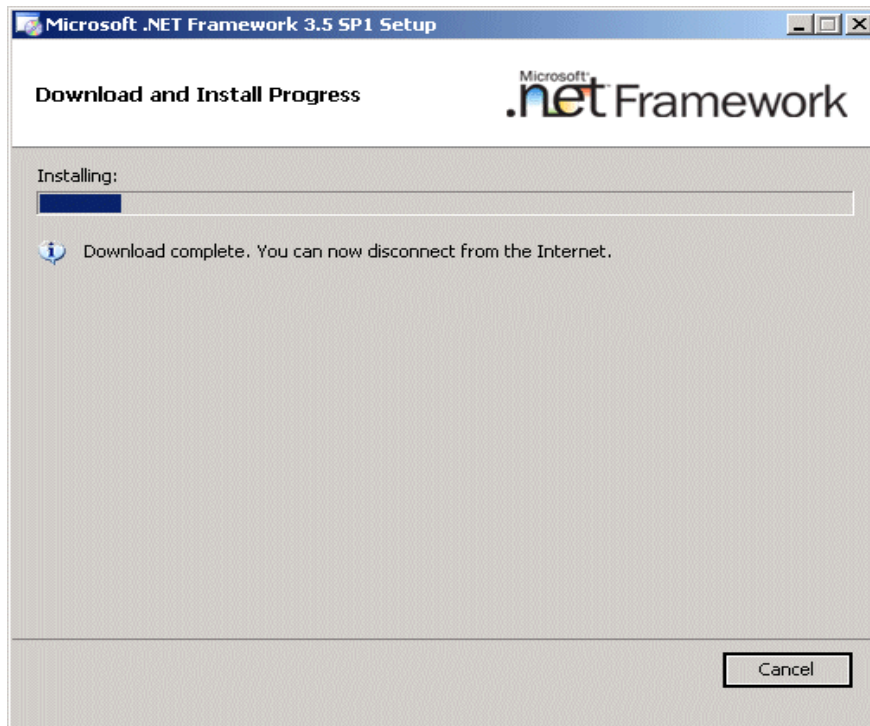
3. Click **Run** and the following window displays:



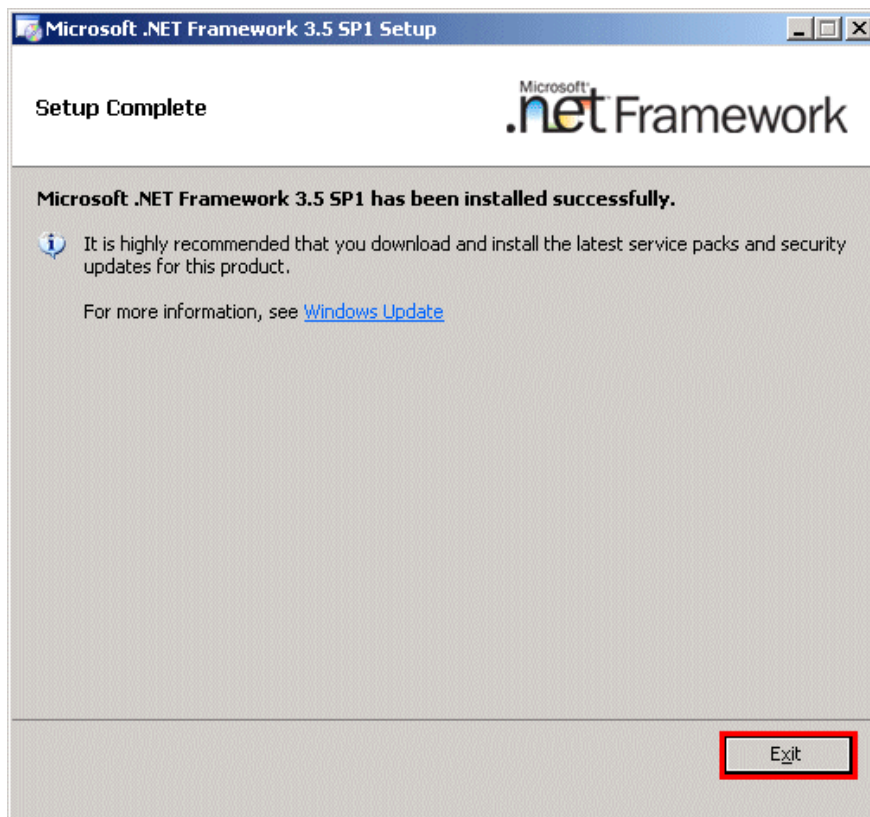
4. Click **Run** and *wait* for Setup to load the installation components. The *Welcome to Setup* window displays.



5. Accept the terms of the License Agreement.
6. Click **Install**.
7. **Wait** for the download process to complete. The *Download and Install Progress* screen displays.



8. **Wait** for the install process to complete. The **Setup Complete** screen displays.





9. Click **Exit**.
10. **Close** the Pointspan Assistant installation window.

## Install the Pointspan Assistant

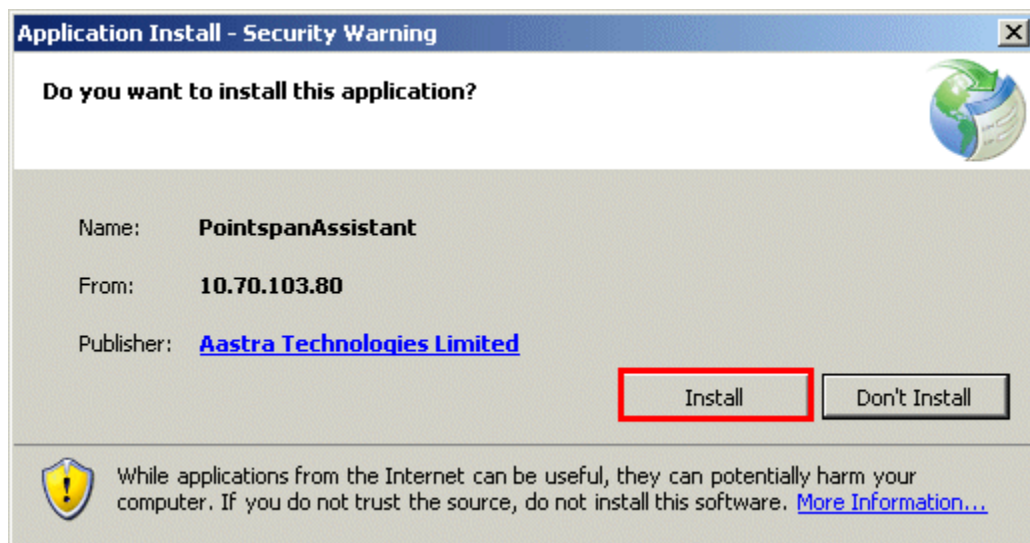
1. Open a web browser window to the server again using the same URL as before:

**http://<ip address or DNS name of server>/pointspanassistant/index.htm**

Since you have already installed the .NET Framework software, the following window displays prompting you to install the Assistant.



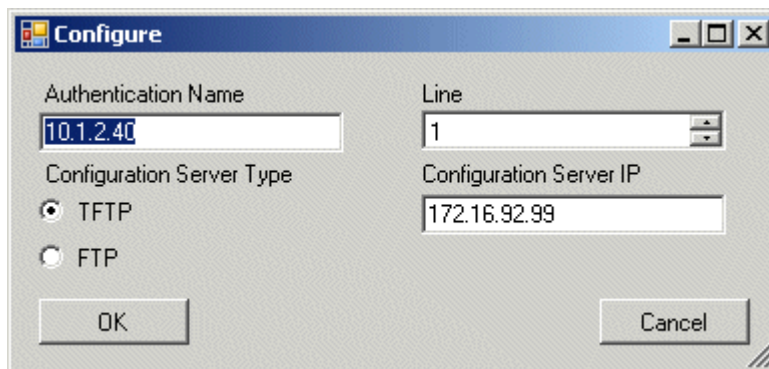
2. Click **Install Pointspan Assistant**. The following window displays:



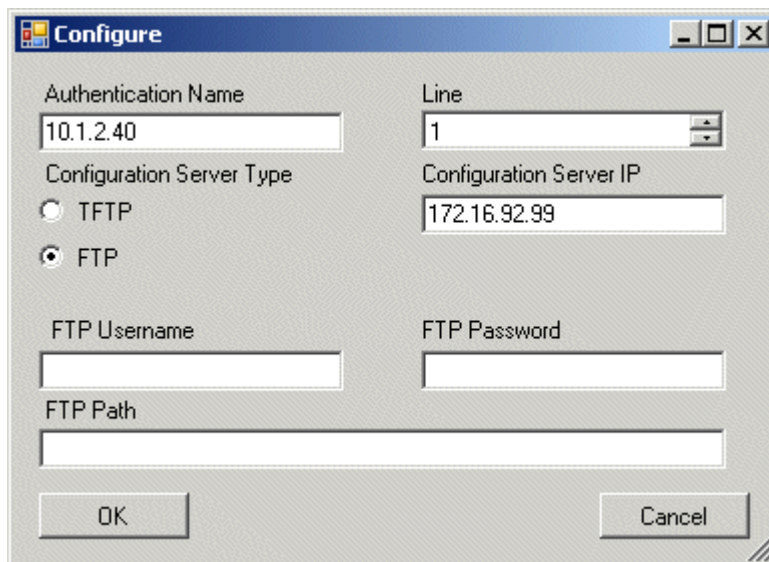
4. Click **Install**. The installation completes very quickly. The Configure dialog box displays.

### Configuration Options

**Figure 2. Configuration for TFTP Server**



**Figure 3. Configuration for FTP Server**

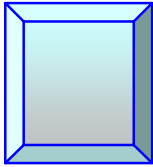


5. Enter the configuration values provided by your system administrator.
  - TFTP Server:
    - **Authentication Name** - Your Pointspan port number.
    - **Line number** - Will always be 1.
    - **Configuration Server type** – TFTP.
    - **Configuration Server IP address** - The IP address of the TFTP server.
    - **Line number** - Will always be 1.

- FTP Server:
    - **Authentication Name** – Your Pointspan port number.
    - **Line number** - Will always be 1.
    - **Configuration Server Type** – FTP
    - **Configuration Server IP Address** – The IP address of the FTP server.
    - **FTP Username**
    - **FTP Password**
    - **FTP Path**
6. Click **OK**. The Pointspan Assistant displays in horizontal format.







## Chapter 6 Customize the Pointspan Assistant

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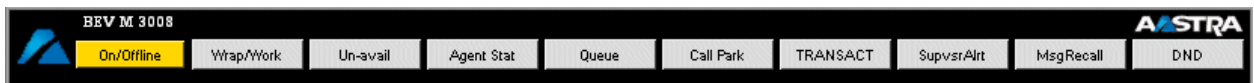
### Overview

The following are the customization options for the Assistant on the desktop.

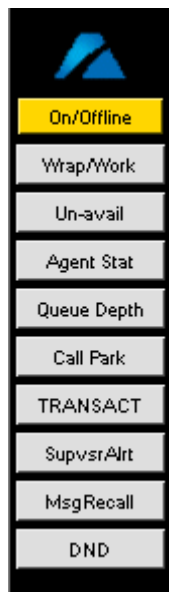
#### Display Options

You can display the Assistant horizontally or vertically. The vertical display is the default.

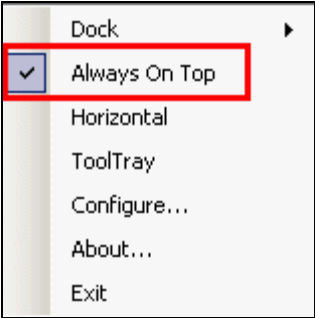
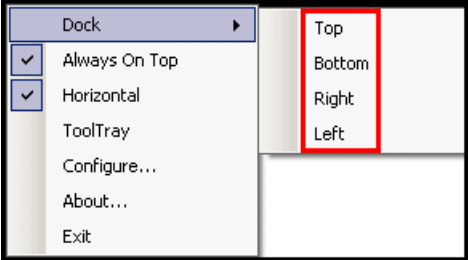

**Figure 4. Pointspan Assistant Horizontal**

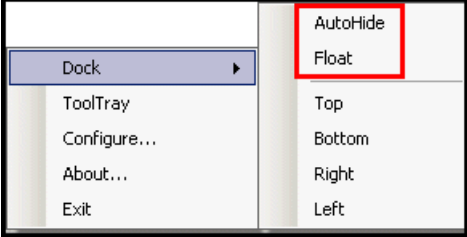





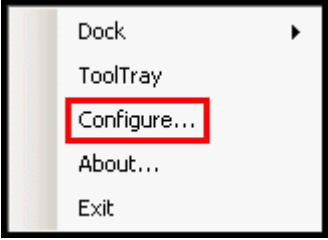
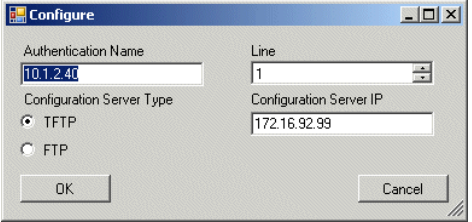

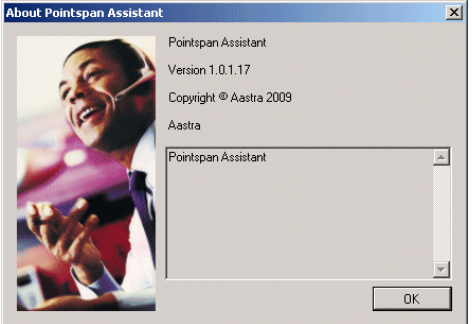
**Figure 5. Pointspan Assistant Vertical**



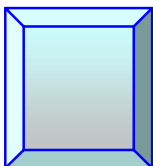
## Display Options

Step	Action	Result
<b>Always on Top option:</b>		
1.	If the Assistant is floating: Right-click on the Assistant.	
2.	Select <b>Always on Top</b> .	The Assistant will remain on top of all screens.
<b>Dock option:</b>		
1.	Right-click on the Assistant.	<p>The following menu displays:</p> 
2.	Click on the screen location where you want to dock the assistant.	<p>The Assistant locks to that side of the screen.</p> 

<b>Auto-Hide Option:</b>		
1.	<p>If you are already docked to a side of the screen:</p> <p>Right-click on the Assistant.</p>	<p>The following menu displays, but now includes the Auto-Hide and Float options.</p> 
2.	Click on <b>Auto-Hide</b> .	The Assistant disappears.
3.	Move the mouse pointer to the side of the screen where the Assistant was docked.	The Assistant reappears.
4.	Move the mouse pointer away from that location.	The Assistant disappears again.
<b>Tooltray option:</b>		
1.	Right-click on the Assistant.	<p>The following menu displays:</p> 
2.	Click on <b>ToolTray</b> .	<p>The Assistant is minimized and the Assistant icon is placed in the tool tray.</p> 
3.	<p>To maximize the Assistant:</p> <p>Click on the Assistant icon  in the tool tray.</p>	The Assistant reappears on your desktop.

Configure option:		
1.	Right-click on the Assistant.	The following menu displays: 
2.	Click on <b>Configure</b> .  <b>Note</b> Since you have already configured the Assistant, all boxes are populated with the correct information. See <a href="#">Configuration Options</a> .	The Configuration dialog box displays: 
About option:		
1.	Right-click on the Assistant.	The following menu displays: 
2.	Click on <b>About</b> .	The About Pointspan Assistant screen displays: 





## Chapter 7 Use the Pointspan Assistant

The Pointspan Assistant provides the same functionality that is available on SPN SIP phones. The Assistant was designed to function exactly like the phones including the way the agent signs on, Work/Wrap, unavailable states, Centergy Reporting® OAI functions such as transact, supervisor alert and message recall, etc. Basic knowledge of how Pointspan ACD works is required.

The following procedures assume that your Assistant displays the default color scheme.

### Note

The agent softphone must be opened before the Assistant or the options will not work.

## Agent Sign On/Off

### Sign On State

Your system administrator has chosen your phone state when you sign on. The following table describes the various states.

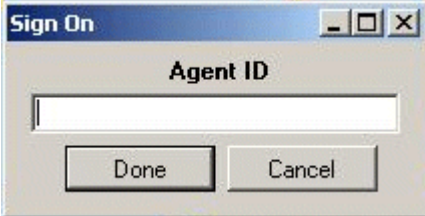
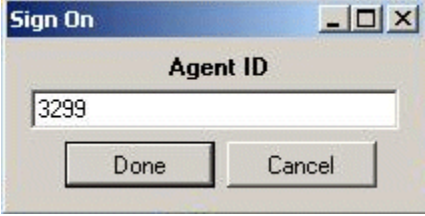
State	Result
Active	You are able to take ACD calls
Agent Unavailable with an optional Reason Code	You are unable to take ACD calls
Work	You are unable to take ACD calls
Hands-Free Auto-Answer On	You are able to take ACD calls in the hands-free mode
Hands-Free Auto-Answer Off	You are able to take ACD calls in normal mode.

### Sign On

### Note

The **OnOffline** button color is Gold indicating you are offline.

Step	Action	Result
<b>Automatic Sign On:</b>		
1.	Bring up the Pointspan Assistant.	The On/Offline button is gold indicating you are Offline.

Step	Action	Result
2.	Click the <b>On/Offline</b> button.	<ul style="list-style-type: none"> <li>The On/Offline button turns gray.</li> <li>You are signed on to the agent group.</li> </ul>
<b>Manual Sign On with Agent ID:</b>		
1.	Click the <b>On/Offline</b> button.	<ul style="list-style-type: none"> <li>The Agent ID prompt window displays.</li> </ul> 
2.	Enter the <b>Agent ID</b> .	
3.	Click <b>Done</b> .	<ul style="list-style-type: none"> <li>The On/Offline button turns gray.</li> <li>You are signed on to the agent group.</li> </ul>
<b>Manual Sign On with Agent ID and Password:</b>		
1.	Click the <b>On/Offline</b> button.	The Agent ID prompt window displays.
2.	Enter the <b>Agent ID</b> .	The Password prompt window displays.
3.	Enter the <b>Password</b> .	
4.	Click <b>Done</b> .	<ul style="list-style-type: none"> <li>The On/Offline button turns gray.</li> <li>You are signed on to the agent group.</li> </ul>

## Sign Off

The **OnOffline** softkey enables you to sign off of the agent group. The **OnOffline** key status lamp is OFF indicating you are online.

### Note

- When you sign off, non-ACD calls can still be placed and received.
- Activating Night Service automatically signs off all agents.

- Auto Answer may be set to be automatically deactivated when you sign off. However, you can reactivate it to automatically answer non-ACD calls.
- When you want to sign off of the ACD group, but there are still calls in queue, press the **OnOffline** key *before* you finish your last ACD call. The current call is not affected and you are signed off when the call is ended. Other agents will answer the calls that are in queue.

Step	Action	Result
1.	Click the <b>On/Offline</b> button.	<ul style="list-style-type: none"> <li>• The button changes to gold.</li> <li>• You are signed off of the agent group.</li> </ul>

## Wrap/Work

### Wrap

The Wrap-up feature is an optional time period that automatically begins after each ACD call. Wrap-up allows you to complete paperwork before taking a new ACD call. System Administrators define the Wrap-up time settings.

Action	Result
ACD call ends	<ul style="list-style-type: none"> <li>• The Wrap/Work button turns green.</li> <li>• You are in Automatic Wrap-up.</li> </ul>
Wrap-up timer expires	<ul style="list-style-type: none"> <li>• The Wrap/Work button turns gray.</li> <li>• You are automatically available to take calls.</li> </ul>
Wrap-up with no timer	<ul style="list-style-type: none"> <li>• The Wrap/Work button turns green.</li> <li>• You are in Automatic Wrap-up until you manually cancel.</li> </ul>

### Cancel Wrap-up

Step	Action	Result
1.	Click the <b>Wrap/Work</b> button.	<ul style="list-style-type: none"> <li>• The Wrap/Work button turns gray.</li> <li>• You can now take ACD calls.</li> </ul>

## Work

The Work state is a time period activated manually by the agent, allowing for a more flexible time between ACD calls for paperwork, filing, or other tasks for which the Wrap-up time cannot be predicted. During this time, you are not available to receive ACD calls.

### Note

- The Work state can be activated at any time except when in automatic Wrap-up.
- If you click the **Wrap/Work** button while on an ACD call, the Work state will take effect at the end of the call. If you wait until after the call is finished to press the Work button, you could receive another ACD call before the Work state has taken effect.

Step	Action	Result
<b>Activate Work:</b>		
1.	Click the <b>Wrap/Work</b> button.	<ul style="list-style-type: none"> <li>• The Wrap/Work button turns green.</li> <li>• You cannot receive ACD calls.</li> </ul>
<b>Deactivate Work:</b>		
1.	Click the <b>Wrap/Work</b> button again.	<ul style="list-style-type: none"> <li>• The Wrap/Work button turns gray.</li> <li>• You now receive ACD calls.</li> </ul>

## Timed Work

If the optional Work state timer (Time for Agent Work) is applied, the system can apply one of the following agent states to the agent still remaining in Work when the timer expires.

- Agent Unavailable:
  - Reason Code Number for Agent Work state – The reason code for agents who become unavailable after being in the Work state longer than the Time for Agent Work parameter.
  - Time for Agent Unavailable - The maximum amount of time an agent can remain in the Unavailable state, after being in the Work state longer than the Time for Agent Work timer.
- Agent Offline

## Unavailable

The Unavailable feature allows you to go into the Unavailable state where you cannot take ACD calls.

Unavailable Reason Codes are defined by the system administrator.

This feature provides an alternative for going into the Work state or signing off of the agent group. Pre-defined reason codes could represent "lunch", "break", etc. The reason code is captured in the system database and is used in statistical reporting.


The Unavailable feature can be:


- Activated manually by using the **Un-avail** button.
- Set up by the administrator to activate at sign-on.
- Set up by the administrator to activate if you have been in the Work state longer than the "Time for Agent Work" timer.

## Unavailable Options

The following are the Unavailable options:

- Unavailable with no Reason Code.
- Unavailable with *optional* Reason Code.
- Unavailable with *required* Reason Code.
- Agent Unavailable can optionally be timed and *automatically* canceled by the system. See your supervisor or system administrator with any questions.

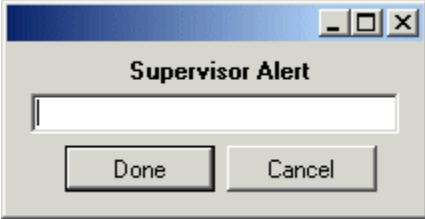
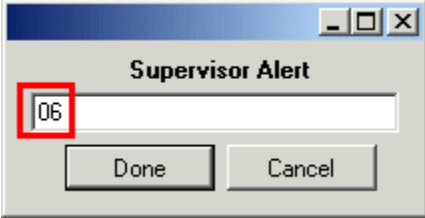

Step	Action	Result
<b>Activate Unavailable:</b>		
1.	Click the <b>Un-avail</b> button.	<p>The reason code list displays.</p> 

Step	Action	Result
2.	Use ▼ or ▲ to highlight the code.	
3.	Click <b>Select</b> .	<p>The Un-avail button turns gold.</p> <p>The verification dialog box displays:</p> 
4.	Click <b>Done</b> .	You are not available to take ACD calls.
<b>Deactivate Unavailable:</b>		
1.	Click the <b>Un-avail</b> button.	<ul style="list-style-type: none"> <li>• The Un-avail button turns gray.</li> <li>• You are now available to take ACD calls.</li> </ul>

## Supervisor Alert

The Supervisor Alert feature:

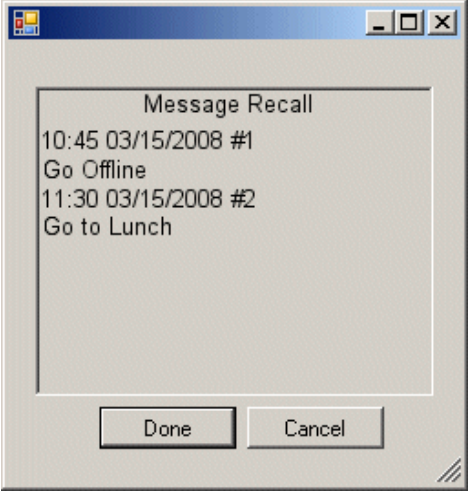
- Allows agents to send pre-programmed messages to the supervisor's call center management screen (Centergy Reporting) using numeric codes provided by the administrator.
- Allows supervisors to send messages to the agents.

Step	Action	Result
<b>Agent to Supervisor Messages:</b>		
1.	Click the <b>SupvsrAlrt</b> button.	The Supervisor Alert dialog box opens. 
2.	Type the numeric message code.  <b>Note</b> Alert Codes are provided by your system administrator.	
3.	Click <b>Done</b> to send the message code and exit.	The alert is sent to the supervisor via the messenger in Centergy Reporting.
<b>Supervisor to Agent Messages:</b>		
1.	You receive a message from your supervisor.	
2.	Click <b>Done</b> .	

## Message Recall

The Message Recall feature allows you to view the Alert messages sent from your supervisor, beginning with the most recent message. Each message includes the time, date, and the message number. The maximum number of messages that can be stored per agent is a system setting in Centergy Reporting. When the maximum is reached, a new message overwrites the oldest message.

## View Messages

Step	Action	Result
1.	Click the <b>MsgRecall</b> button.	<ul style="list-style-type: none"> <li>The MsgRecall button turns gold, then gray again.</li> <li>The messages display in a window.</li> </ul> 
2.	Press ▼ or ▲ to scroll through the display to review all messages.	

## Transact

The Transact feature provides a means to obtain common statistical information about calls. System administrators set up the fields and codes based up the current requirements.

Transact is used for reasons such as tracking types of calls for a specific product, or for special campaigns such as a pay-per-view boxing event. The Transact feature is set up separately for each call center.

Transact fields and codes can be deleted, rebuilt and used again for an entirely different subject.

To use the feature, you must do the following:

- Obtain the information from the customer.
- Select codes based upon that information.
- Depress the Transact button on the Assistant.
- Enter the code number(s) using the keypad.

### Note

- Transact Codes can be entered while talking to a caller or between calls.

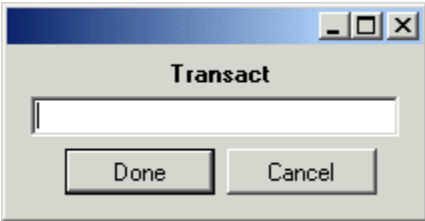
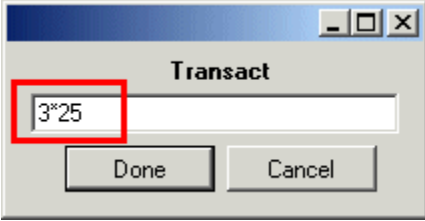



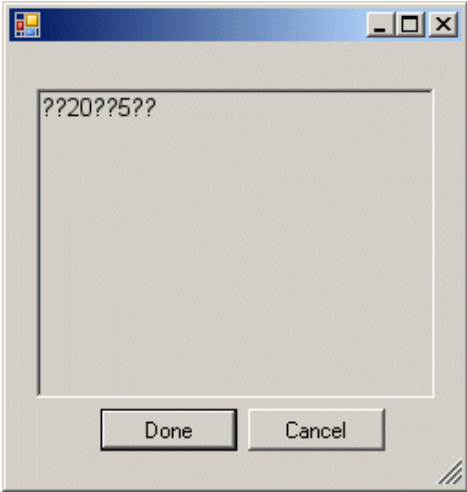
- The caller does not hear the tones when the Transact codes are entered.

In the following example, a customer calls to renew his subscription to a monthly pet magazine. The agent takes calls for magazines, books, and catalogs. The agent will enter the code for the type of publication, then, enter the code for the specific publication for that type.

**Note**

The button label is defined by your system administrator and may be different on your phone.

Step	Action	Result
1.	Click the <b>Transact</b> button.	The Transact screen displays. 
2.	Enter the Transaction code.	
3.	Click <b>Done</b> to send the code and exit.  <p><b>Note</b></p> You must close this window before you can use the Assistant buttons again.	<ul style="list-style-type: none"> <li>The Transact code confirmation window displays.</li> </ul>  <p>The code is successfully entered and stored.</p>

Step	Action	Result
4.	<p><b>Note</b></p> <p>If a field or code is defined, the text will display. If a field or code is not defined, the code number you entered will display with question marks as in the example below.</p> 	

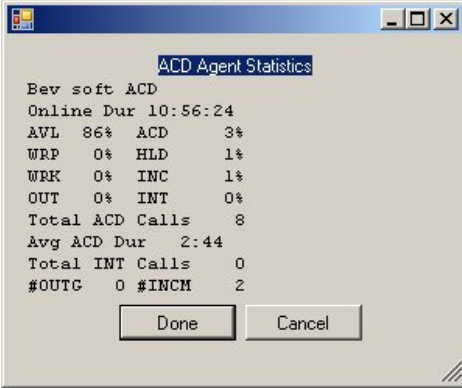
## Agent Statistics

The Agent Statistics button enables the agent to view current individual agent statistics. The following Agent Statistics display.

Screen Display	Description	
Agent Name		Agent name
Online Dur.		Online Duration
AVL	Available	The percentage of time available to receive calls
ACD	Automatic Call Distribution	Percentage of time answering ACD calls
WRP	Wrap-up	Percentage of time in Wrap-up state
HLD	Hold	Percentage of time in Hold state
WRK	Work	Percentage of time in Work state
INC	Incoming	Percentage of time on incoming calls
OUT	Outgoing	Percentage of time on outgoing calls

Screen Display	Description	
INT	Internal	Percentage of time on internal calls
Total ACD calls		Total number of ACD calls
Avg ACD Dur		Average duration of ACD calls
#OUTG	Outgoing	Total number of outgoing calls
#INCM	Incoming	Total number of incoming calls

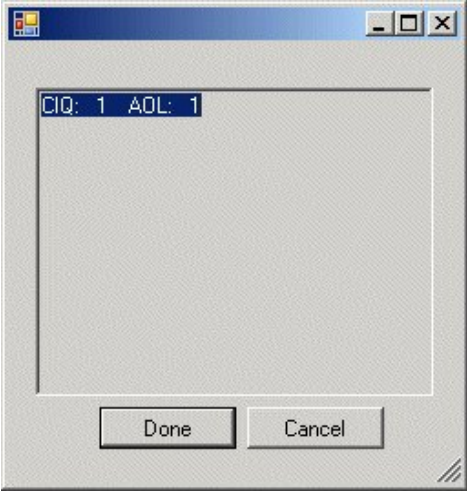
## Use the Agent Statistics Button

Step	Action	Result
1.	Click the <b>Agent Stat</b> button.	The Agent Statistics window displays: 
2.	Click <b>Done</b> to exit.  <b>Note</b> You must close this window before you can use the Assistant buttons again.	

## Queue Depth

The Queue Depth button enables agents and supervisors to display current queue information. The following queue information displays.


Acronym Displayed	Description
CIQ	Number of Calls In Queue
AOL	Number of Agents Online.

Step	Action	Result
1.	Click the <b>Queue</b> button.	The Queue information displays: 
2.	Click <b>Done</b> to exit.  <b>Note</b> You must close this window before you can use the Assistant buttons again.	

## Call Park

The Call Park button allows you to temporarily place a call on hold for a pre-set time limit. The call can be retrieved on any phone in the system. If the call is not retrieved within the time limit, the call automatically reverts back to the extension that parked the call.

Step	Action	Result
<b>Park a Call:</b>		
1.	From a connected call: Click the <b>Call Park</b> button on the Assistant.	<ul style="list-style-type: none"> <li>You hear the <b>Park number</b> and then silence.</li> <li>The call is parked and you can place and receive calls.</li> </ul> <b>Note</b> To hear the number <i>repeated</i> , immediately press the <b>Call Park</b> key again
2.	Write down the <b>Park number</b> .	

Step	Action	Result
3.	Hang up the softphone.	
<b>Retrieve a Parked Call:</b>		
1.	From any phone on the system: <ul style="list-style-type: none"> <li>Lift the handset.</li> </ul> <b>Or</b> <ul style="list-style-type: none"> <li>Press the <b>Speaker</b> key.</li> </ul> <b>Or</b> <ul style="list-style-type: none"> <li>Click on the <b>Offhook</b> button  on your softphone.</li> </ul>	Hear dial tone.
2.	Dial the <b>Call Park</b> number.	<ul style="list-style-type: none"> <li>No ringing is heard.</li> <li>You are immediately connected to the calling party.</li> </ul>

## Do Not Disturb

The Do Not Disturb (DND) feature allows you to block incoming calls on your softphone. When DND is activated, an incoming call does not ring at the softphone. Depending upon your system configuration, the caller may hear a message to call back later, or the call will forward directly to your pre-defined call forward busy destination, usually your voicemail. The DND button on the Assistant toggles this feature on and off.

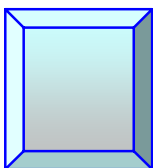
If the phone shares a line with other phones, only the phone where DND was set is affected.

### Note

You can only use the DND button when you are *Offline*. If you use the DND button on the softphone while online, you can't answer the next ACD call that comes in. The system marks you Offline, and re-queues the call.

Step	Action	Result
<b>Activate Do Not Disturb:</b>		
1.	Click the <b>DND</b> button.	The DND button turns gold and the feature is activated.
<b>Deactivate Do Not Disturb:</b>		
1.	Click the <b>DND</b> again.	The DND button turns gray and the feature is deactivated.





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