Agent Maintenance Plug-in

This document describes how to use the Agent Maintenance Plug-in within Startel CMC Administrative Controls.

Sections include:

- **Introduction to Agent Maintenance** *(page 8)*
  This section introduces concepts and features that are fundamental to the Agent Maintenance Plug-in.

- **Adding an Agent to the Agent Database** *(page 10)*
  This section describes two methods for adding agent profiles to the Agent database: adding a profile from scratch, and copying an existing profile.

- **Editing an Agent Profile** *(page 19)*
  This section describes the basic procedure for editing an agent profile.

- **Customizing an Agent Profile** *(page 21)*
  This section shows you how to add an agent signature to a record for use in CMC IntelliForm handling, and how to customize colors and fonts in an agent’s Agent Interface screen.

- **Removing an Agent From the Agent Database** *(page 30)*
  This section describes the procedure for removing an agent record from the Agent database.

- **Appendix: Signature File Template** *(page 31)*
  This section contains a page that can be copied to provide a template for agent signature files.
INTRODUCTION TO AGENT MAINTENANCE

In STARTEL CMC Administrative Controls (AC), you use the Agent Maintenance plug-in to maintain your call center’s Agent database. Using this plug-in, you can add and remove agents, edit agent information, assign agents to Affinity groups and Access groups, customize agent workstation screens, display the current agent list, and more.

Launching the Agent Maintenance Plug-in

Follow these steps to launch the Agent Maintenance plug-in from the Administrative Controls (AC) Home page:

1. Double-click on the shortcut in the AC Home page.

   The Agent Maintenance opening window is displayed:

   ![Agent Maintenance Opening Window](image)

   This sample screen represents an Agent Maintenance plug-in to which agents have already been added.

   To open an agent’s profile, you simply double-click the icon labeled with the agent’s Agent ID.
The Administrator Profile

By default, an Administrator profile is “hard wired” in the Agent database. You’ll see a corresponding icon in the Agent Maintenance window. This Administrator record, which cannot be deleted, ensures that someone at your site always has administrative access to the Startel system.

At installation, the Administrator profile has a pre-assigned User ID and password. To safeguard your call center, it’s advisable to change the default password to another, more secure password.

The Agent Maintenance Toolbar

At the top of the Agent Maintenance window, there are two toolbars. The topmost is the Administrative Controls (AC) toolbar, which is standard in all plug-ins.

Below the AC toolbar, a smaller toolbar is displayed. This is the Agent Maintenance toolbar.

![Agent Maintenance Toolbar]

Controls in the Agent Maintenance toolbar work as follows:

- Displays first page of agents.
- Displays previous page of agents.
- Shows the current page number. Also, if you select the contents of the box, you can type a number and press Enter to display the specified page.
- Displays next page of agents.
- Displays last page of agents.
- Locates a specified agent. To locate an agent, type the agent’s complete Agent ID (case sensitive) in the Find Agent field. Then press Enter.
- When selected, displays all agents on a single page.

CAUTION: Make sure to securely document the Administrator password if you change it.
**ADDING AN AGENT TO THE AGENT DATABASE**

There are two ways to add an agent profile to the Agent database:

- You can add an agent profile “from scratch” (see page 11).
- You can copy an existing agent profile (see page 18).

Before you use either method, you should make sure that you understand the meaning and importance of assigning agents to **Access groups** and **Affinity groups**. You must also make sure that appropriate Access groups and Affinity groups have been set up for your site.

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### Affinity Groups and Access Groups

Whenever you add an agent to the Agent database, you must assign the agent to an **Access group** and to one or more **Affinity groups**.

**What is an Access Group?**

An Access group is a mechanism that is used to assign **access rights** in your call center. When you assign an agent to an Access group, the assignment defines exactly what the agent can and cannot do in **STARTEL Administrative Controls** and in **Agent Interface**. For example, an agent’s Access group assignment determines which AC plug-ins the agent can access, and whether or not the agent can add, edit, copy, and delete from these plug-ins.

Most Startel systems are set up with a pre-configured **Administrator** group and **User** group (at a minimum). Persons in the Administrator group typically have authorization to perform any task anywhere in the system. Persons in the User group normally have “view only” privileges in most areas of the system. Additional groups can be set up to assign selected privileges to agents of different levels.

**What is an Affinity Group?**

Affinity groups normally correspond to the **Split Groups** or **Call Queues** (depending on your switch) that the switch uses to route calls for specific clients to specific agents. However, whereas Split Groups and Call Queues direct calls, Affinity groups ensure that agents have access to all the information they need to service the calls.

**Clients** are also assigned to Affinity groups. When you assign an agent to an Affinity group, you’re giving the agent access to all the information needed to provide services to the **clients** in that group.

**NOTES:**

- An agent can be assigned to one Access group and any number of Affinity groups.
- Affinity groups and Access groups should be set up before you start adding agents to the Agent database.

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Though Affinity groups are typically defined to correspond to specific split groups or call queues, it is not mandatory. Some call centers create “non-corresponding” Affinity groups for training purposes, or for agents who do not answer calls.
Adding an Agent from Scratch

Follow these steps to add an agent to the Agent database from scratch:

1. Launch STARTEL Administrative Controls.

2. In the AC Home page, double-click on the shortcut.
   
   The Agent Maintenance opening window is displayed:

   ![Agent Maintenance Window]

   By default, agents are sorted in the Agent Maintenance opening window by Agent ID, but you can click on any column heading if you want to sort by items in that column instead.

3. Click (Add) on the AC toolbar (or select Edit > Add Entry from the Menu bar).
The first screen of the Create Agent wizard is displayed. This is the Agent Settings screen:

4 Fill in the upper part of the Agent Settings screen as follows:

- In the Agent ID and Password fields, enter the Agent ID and password that the agent will use to log into Agent Interface and Administrative Controls. (The Agent ID must begin with a letter, and should contain no spaces.)

  ➢ NOTE: Passwords are case sensitive, and can be up to 30 characters in length.

- In the First Name and Last Name fields, enter the agent’s first and last names.

- In the Max # of Licensed Logins field, enter the maximum number of agent workstations that the agent should be able to be logged into simultaneously. (At least 2 is recommended, so that the agent has an alternate means of logging into the system in the event that there is a problem with his/her PC.)

- In the Initials field, enter unique initials that will serve to identify the agent in the system. Up to 6 characters can be entered, and you can include numbers, if necessary, to achieve uniqueness (e.g, AMM1).

- For the Access Control setting, select an Access group for the agent from the drop-down menu. (For details on the importance of Access groups, see page 10.)

The Agent ID identifies the agent in the Agent Maintenance window shown on page 8, so it’s advisable to choose an ID that easily identifies the agent.
5 In the area labeled **ACD Login**, you won’t normally need to enter anything. This section is for sites (with a digital switch) whose agents are using attend- dant telsets without Agent Interface. If your site is in this category, contact Startel for assistance with this section.

6 In the **Private Called Number** field, enter the Call ID (up to 10 digits) that should be used to ring this specific agent.

7 When you have finished filling in the Agent Settings screen, click **Next**. The **Agent Affinity Groups** screen is displayed. The Affinity Groups that are listed in this screen will depend on the Affinity groups that have been defined for your system in the Affinity Groups plug-in.

8 Select the checkbox next to each Affinity group to which you want to assign the agent.

9 For each group you selected, enter a value in the associated **Skill Rank** field to assign a Skill Ranking to the agent for that group. Low numbers indicate a high ranking; high numbers indicate a low ranking. If you leave the Skill Rank field **blank**, the highest possible ranking will be assumed. (See margin note.)

**Note**: Step 9 applies only to sites using the Startel Soft Switch.

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**More on Skill Ranking**

Agent “Skill Ranking” for Affinity groups allows the Startel Soft Switch to send calls to the most qualified available agents. When a call comes in, the switch identifies the Affinity group associated with the call, then sends the call to the available agent with the highest skill ranking for that group.

It is up to each site to determine the value range for their skill ranking. A typical range is 1-10, with 1 being the highest ranking, and 10 being the lowest. If you leave a Skill Rank field blank, the highest ranking is assumed.
10 When you’re finished in the Agent Affinity Groups screen, click Next.

Now the Agent Options screen is displayed. You use this screen to enable various system options for the agent.

To select or deselect all of the options in the Agent Options screen, use the Select All or Deselect All button.

11 Select all the options that you want enabled for the agent. These work as described below:

<table>
<thead>
<tr>
<th>Agent Option</th>
<th>Description</th>
</tr>
</thead>
</table>
| ACD - Auto Answer    | When selected, this option turns on the Auto Answer feature for the agent, which answers calls automatically (i.e., the agent does not have to press the ANSWER key).  
  ➢ Note: This feature requires additional switch configuration. |
<p>| ACD - Connect To     | When selected, this option allows the agent to access the “Connect To” trunk group. The “Connect To” trunk group is a specially defined trunk group that is set up to be used when a qualified agent presses the Connect To key. |
| ACD - Dial Out       | When selected, this option allows the agent to dial out.                     |
| ACD - Hold Call Only | When selected, this option restricts the agent to answering Hold calls only. |</p>
<table>
<thead>
<tr>
<th>Agent Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>ACD - Long Distance Dialing</strong></td>
<td>When selected, this option allows the agent to dial out long distance.</td>
</tr>
<tr>
<td><strong>ACD - Monitor</strong></td>
<td>When selected, this option allows the agent to monitor the audio of an Agent, Trunk or Telset (Digital Switch only).</td>
</tr>
<tr>
<td><strong>ACD - New Call Only</strong></td>
<td>When selected, this option restricts the agent to answering <em>New</em> calls only.</td>
</tr>
<tr>
<td><strong>ACD - Patch Calls</strong></td>
<td>When selected, this option allows the agent to patch one caller to another.</td>
</tr>
</tbody>
</table>
| **Action Retrieval by Rotating Categories** | When selected, this option causes Actions to display to the agent in rotating categories. *It works like this:* When the agent presses the Action key in Agent Interface, the system displays the longest waiting Action from the *first* category containing waiting Actions. The next time the Agent presses the Action key, the longest waiting action from the *next* category containing waiting Actions is displayed, and so on.  
Notes:  
➢ This option is disabled if the **Action Retrieval by Traditional Mode** option is enabled in the Site Settings plug-in.  
➢ When this option is NOT enabled, pressing the Action key from Agent Interface works in one of two ways, depending on the status of the Site Settings option, **Action Retrieval by Traditional Mode**.  
  • If the **Action Retrieval by Traditional Mode** option IS selected in Site Settings, pressing the Action key causes the longest waiting Action from any category to display to the agent.  
  • If **Action Retrieval by Traditional Mode** IS NOT selected in Site Settings, pressing the Action key presents the Agent with a pick list of Action categories and the number of actions in each category. Once a category is selected, the longest waiting Action in that category is displayed. |
| **Admin Control Change Auto Save**   | When selected, this option prevents the “Confirm Save” prompt from appearing when the agent issues a Save command in an Administrative Controls plug-in. (The save is confirmed automatically.) |
| **Admin Control Change Prompt for Notes** | When selected, this option adds a **Note** field to the “Confirm Save” prompt that may display to the agent in Administrative Controls. Note text, when entered, appears in Activity Log records.  
When the **Admin Control Change Auto Save** option (described above) is *not* selected (thus preventing the Confirm Save prompt from popping with each Save), a simple Note prompt is displayed each time changes are saved in an AC plug-in. |
<p>| <strong>Allow Client Access in Admin Control Regardless of Affinity</strong> | When selected, this option allows the agent to access any client in the Client Maintenance plug-in regardless of the agent’s Affinity group assignment. |</p>
<table>
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<tr>
<td>Allow Client Access in Agent Interface Regardless of Affinity</td>
<td>When selected, this option allows the agent to access any client in Agent Interface regardless of the agent’s Affinity group assignment.</td>
</tr>
<tr>
<td>Allow Client Action Retrieval Regardless of Affinity</td>
<td>When selected, this option allows the agent to retrieve any client Action regardless of the agent’s Affinity group assignment.</td>
</tr>
<tr>
<td>Allow Remote Access</td>
<td>When selected, this option allows the agent to log in to the Startel system from a remote installation of Agent Interface or Administrative Controls.</td>
</tr>
<tr>
<td>Disable SAM Broadcast in Agent Interface</td>
<td>When selected, this option prevents the agent's workstation from broadcasting data (as UDP packets on the network) to the SAM plug-in, or to the CMC Dashboard.</td>
</tr>
<tr>
<td>Full Access on Report</td>
<td>When selected, this option gives the agent access to all the reports available in the Reports Standard plug-in. When this option is not selected, agents can access only the following four reports: Board Check; Print Records; In-Call Day Summary; and Monthly Call Summary.</td>
</tr>
<tr>
<td>IM - Allow Screen Monitor of Same Access Group</td>
<td>This option applies if your site is using the Startel Instant Messaging application, and if the agent belongs to an Access Group that has Monitoring privileges in the application. When selected, this option allows the agent to use the Instant Messaging application to monitor screens of other agents in the agent’s Access Group.</td>
</tr>
<tr>
<td>IM - Not Allow Screen Monitor</td>
<td>When selected, this option prevents the agent’s screen from being monitored by other agents using the Startel Instant Messaging application.</td>
</tr>
<tr>
<td>Maximize Display on New Call</td>
<td>When selected, this option automatically maximizes the Agent Interface screen when the agent is presented with a call.</td>
</tr>
</tbody>
</table>

12 When you’re finished selecting Agent Options, click **Next**.
The **Agent Finished** screen is displayed:

![Agent Finished Screen](image)

**Note:** If you want to go back and change anything before you finish, click the **Back** button until the screen you want to edit is displayed.

13 Click **Finish** to save the agent record and redisplay the Agent Maintenance window.

After you click **Finish**, you’ll see the new agent added to the Agent Maintenance window.

If you want to make any changes to the agent profile, or if you want to add custom features to the profile, follow the instructions on pages 19 - 27.
Copying an Existing Agent Profile

If you want to create a new agent profile that is similar to an existing profile, it may be quicker to copy the existing profile than to create a new one from scratch.

When you copy an agent profile, the Affinity group assignments, Access group assignment, and Agent Option settings are copied from the existing record. The only things you need to add are the values (like Agent ID and Password, etc.) that must be unique for the agent.

Follow these steps to create an agent record by copying a existing profile:

1. In the AC Home page, double-click the shortcut to open the Agent Maintenance opening window.
2. In the Agent Maintenance window, select the agent whose record you want to copy.
3. Click (Copy) on the AC toolbar (or select Edit > Copy Entry from the Menu bar).

The Copy Agent screen is displayed:

![Copy Agent Screen]

4. Fill in this screen as appropriate for the new agent (see page 12 if you need guidance).
5. Click Finish to save the new record and redisplay the Agent Maintenance opening window, where the new, “copied” agent will now be listed.

If you want to make any changes to the agent record, or if you want to add custom features to the record, you can do so following the instructions provided in the pages that follow.
EDITING AN AGENT PROFILE

Follow these steps to open and edit an agent profile:

1. In the AC Home page, double-click the shortcut to display the Agent Maintenance opening window.

2. Double-click the Agent ID of the agent whose profile you want to edit.

   The agent's General Settings screen is displayed.
3 If necessary, apply changes to the General Settings screen. (See page 12 and Disabling vs. Removing an Agent Profile, below, for details on the values in this screen.)

4 To add or change additional agent settings, click icons on the left side of the Agent Maintenance window to access the appropriate screens.

- For information on the Affinity Group screen, see page 13.
- For information on the Options screen, see pages 14 - 16.
- For information on the Signature screen, see pages 21 - 23.
- For information on the Field Colors screen, see pages 24 - 25.
- For information on the Field Fonts screen, see page 26 - 27.
- For information on the Agent Alerts screen, see page 28.

5 When you’re finished editing the agent profile, click  
(Save) on the AC toolbar to save the changes.

6 If prompted to confirm the save, select Yes.

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**Disabling vs. Removing an Agent Profile**

Notice the **Disable** checkbox in the General Settings screen. You can use this checkbox, if necessary, to “turn off” an agent profile without deleting it from the Agent database.

When an agent is disabled, the agent will be unable to log in to Agent Interface or any of the Administrative Controls plug-ins to which the agent previously had access rights. However, the agent’s initials will still appear in reports, and log files.

If you **remove** an agent from the Agent database, **the agent’s initials are removed from reports, and log files**. You may, therefore, want to disable rather than remove agent profiles when agents leave your service—at least in the short term.
CUSTOMIZING AN AGENT PROFILE

After you have set up a basic agent profile, there are several ways in which you can customize the profile. Refer to the following topics for details:

- Adding a Signature to an Agent Profile (see below)
- Selecting Agent Field Colors (page 24)
- Selecting Agent Field Fonts (page 26)
- Configuring Agent Alerts (page 28)
- Assigning a Special Site User Logon to an Agent (page 29)

Adding a Signature to an Agent Profile

Selecting Signature in the left pane of an open agent record displays a screen for adding a signature to an agent profile. A signature allows an agent to, in effect, sign the IntelliForms they process.

To use this feature, a (.GIF-format) signature file must be created for the agent. For details on this signature file, and for directions on how to use this screen once a signature file is available, see the page that follows.

NOTE: For details on how to configure IntelliForms to support signatures, see the Client Maintenance Plug-in User’s Guide or the IntelliForms Templates Plug-in User’s Guide.
What is a Signature File and Why Would an Agent Need One?

A Signature file allows an agent to, in effect, sign IntelliForms. This feature is especially useful for agents who handle IntelliForms that serve as legal documents.

A signature file is a black and white graphics file containing a 20 pt. hand-written signature that has been digitally scanned and saved as a .GIF file.

The .GIF file containing the agent’s signature can be created using any digital scanning program. (This software is not provided by Startel.) For better clarity when dispatching, the signature should be created with a black Sharpie® (or similar permanent ink pen). See page 31 for a template that agents can use for writing signatures.

How does a Signature File Work?

If a signature file has been attached to an agent profile, the agent’s signature will automatically appear in any faxed or e-mailed IntelliForm that the agent has handled—providing that the IntelliForm has an available value field that has been assigned the Signature type.

Sixteen Signature types are available per IntelliForm—Signature 1, Signature 2, and so on. If an IntelliForm has multiple Signature fields, the signature of the first agent to handle the IntelliForm is added to the Signature 1 field, the signature of the second agent to handle the IntelliForm (if different) is added to the Signature 2 field, and so on. If an agent with a signature handles the IntelliForm, but there is no available Signature field, no signature will be added.

Note: A signature field must be at least 30 characters wide. (A maximum of two Signature fields can be placed on a single IntelliForm line.)

Attaching the Signature

Follow these steps to add a signature file to an agent Signature screen:

1. Click the Use Signature option in the Signature screen.
2 Click and select the .GIF file containing the agent's signature from the dialog box that displays.

3 If you want to see the signature in the Preview area, click .

The selected signature now appears in the Preview area of the screen.

4 Click (Save) on the AC toolbar to save.

- NOTE: Once you’ve added a signature to an agent profile, the original .GIF file that was created from the agent’s scanned signature is no longer needed. For security reasons, you should DELETE this file. The agent signature that will be added to IntelliForms is stored in the database in an encrypted format that poses no security risk.

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Removing a Signature File from an Agent Profile

To remove a signature file from an agent profile, select the Do not use signature option in the agent’s Signature screen, then click (Save) on the AC toolbar. (This clears the Signature File and Preview fields).

The agent’s updated “No-Signature” status will be applied to the agent profile the next time the agent logs in.
Selecting Agent Field Colors

Selecting Field Colors in the left pane of an open agent record displays a screen like the following. This screen allows you to customize the Background and Text colors in different areas of the agent’s Agent Interface screen.

When you first open this screen for an agent, default colors are displayed. (For details on how default colors are determined, see page 25.)

To change the Background or Text color for any section of the Agent Interface screen, click the drop-down arrow for the item you want to change, then select from the displayed color palette.

(To select from a wider range of colors, click More Colors... to display additional choices.)

When you’re finished selecting colors, click (Save) on the AC toolbar.
More on Agent Interface Field Colors

Three factors in a Startel system can affect the colors that appear in Agent Interface screens:

- System Default Field Colors
- Site Settings Field Colors
- Agent Maintenance Field Colors

System Default Field Colors

A set of system default field colors for Agent Interface screens are hard-wired in the Startel system. These colors are used automatically when no color changes have been applied in other parts of the system.

Site Settings Field Colors

The Default Field Colors element of the Site Settings plug-in allows your call center to define its own set of default field colors.

Colors defined in the Site Settings plug-in are used in all Agent Interface screens that have not been customized using Agent Maintenance settings.

When system colors have been defined in the Site Settings plug-in, the original system default colors can be restored at any time by clicking the button in the Site Settings Default Field Colors screen. For more on Site Settings, see the Site Settings Plug-in User’s Guide.

Agent Maintenance Field Colors

The Field Colors element of the Agent Maintenance plug-in can be used to define custom screen colors for specific agents.

If color changes are made for a specific agent in the Agent Maintenance plug-in, Site Settings default colors can be restored for the agent at any time by clicking the button in the Agent Maintenance Default Field Colors screen.

➢ Note: If an agent’s Access Group gives the agent the right to change his/her own screen colors, the agent can use the Setting > Color command in Agent Interface to change screen colors. Colors changed in this fashion automatically update the agent’s Default Field Colors screen in Agent Maintenance.
Selecting Agent Field Fonts

Selecting **Field Fonts** in the left pane of an open agent record displays a screen that you can use to customize the **text fonts** used in the agent’s Agent Interface screen. Text Fonts specified here override font parameters selected for your site in the Site Settings plug-in.

- **NOTE:** Fonts specified for client *Ifs* and *Locates* in the **Client Maintenance plug-in** override the font parameters specified for Ifs and Locates in both the Agent Maintenance and Site Settings plug-ins. Agent-specific font selections for Ifs and Locates apply only to Ifs and Locates typed by the agent in Agent Interface.

When this screen is opened for the first time, fonts and font sizes selected in the Site Settings plug-in are displayed.
Changing Font Face

For each of the listed text types, you can open a drop-down menu and select from a list of font faces. The fonts that are listed depend on the fonts that are installed on your PC. If you select a font that is not available on the agent’s PC, the Arial Alternative font will be used for the agent. Arial Alternative is a custom Startel font that is automatically installed on all agent workstations.

Changing Font Size

For each of the listed text types, you can select from a list of font sizes, ranging from 8 points to 72 points.

NOTES:

- The Default option at the top of the screen affects text used for lists, menus, and other text not included in the other listed types (e.g., Ifs, Locates, Message Forms etc.).

- If you change fonts, you can restore the Site Settings values at any time by clicking Defaults at the bottom of the screen.
Configuring Agent Alerts

Selecting **Agent Alerts** in the left pane of an open agent record displays a screen that allows you to configure two types of agent alerts. One causes the agent’s workstation to beep when a new call is presented to the agent, and the other causes the workstation to beep when a new Action has entered the Actions queue.

- **NOTE:** For this feature to work, the agent’s workstation must have sound capabilities.

When this screen is opened for the first time, alert features are NOT enabled.

- To enable **New Call Alerts**, select the **New Call Alerts** checkbox. Then enter a **Frequency** value below to indicate how often you want beeps to repeat for the same new item. By default, a Frequency value of 6 seconds is entered for New Call Alerts.

- To enable **New Action Alerts**, select the **New Action Alerts** checkbox. Then enter a **Frequency** value below to indicate how often you want beeps to repeat for the same new item. By default, a Frequency value of 10 seconds is entered for New Action alerts.

To save changes in this screen, click **Save** on the AC toolbar.
Assigning a Special Site User Logon to an Agent

Selecting **Appointment Scheduler** in the left pane of an open agent record displays a screen that you can use—if necessary—to assign a specific Site User Account to the agent for the Appointment Scheduler web portal.

You will only need to use this feature if your site has licensed the Appointment Scheduler web portal, and if you want the agent to login to the Appointment Scheduler using a Site User Account *other than* the default Site User account defined for your site.

**NOTES:**

- Appointment Scheduler Site User Accounts are defined in the Appointment Scheduler web portal.
- The *default* Site User Account for your site must be identified and enabled in the Site Settings plug-in.
- The Site User Account that you assign to an agent can be (but does not have to be) set up specifically for the particular agent.

To assign a specific Appointment Scheduler Site User Account to the agent, enter the User Name associated with the account in the **User Id** field.

When you’re finished, click the ![Save](Save) on the AC toolbar to save.

**NOTE:** See the **Appointment Scheduler User Guide** for complete information on the Appointment Scheduler application.
REMOVING AN AGENT FROM THE AGENT DATABASE

Follow these steps to remove an agent from the Agent database:

1. Launch STARTEL Administrative Controls.

2. In the AC Home page, double-click on the shortcut. The Agent Maintenance opening window is displayed.

3. Select (click on) the Agent ID for the agent that you want to remove.

4. Click (Remove) on the AC toolbar (or select Edit > Remove Entry from the Menu bar).

5. When a confirmation prompt is displayed, select Yes. The agent is now removed from the Agent database.

NOTES:

- To remove an agent from the Agent database you must be an administrator or belong to an Access group that has “Delete” privileges in the Agent Maintenance plug-in.

- If necessary, you can use the SHIFT or CTRL key to select multiple agents for removal. SHIFT lets you select a range of adjacent agents; CTRL lets you select non-adjacent agents.

- If you remove an agent from the Agent database, the agent’s initials will be removed from report statistics. You may therefore want to disable rather than remove agents when agents leave your service—at least in the short term.

- The Administrator profile cannot be removed from the Agent database.

- An agent cannot remove him or herself from the Agent database.
## APPENDIX: SIGNATURE FILE TEMPLATE

This page can be copied to provide a template for signature files. To create clear and distinguishable signatures for scanning, agents should write their signatures in the boxes below using a black Sharpie® or other black permanent ink pen. For more on signature files, see page 21.

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