Farlon Agent Desktop

for Cisco UCC

Phone Book Administrator

User Manual | EN

Table of Contents

Introduction

Farlon Phone Book Administrator is a user-friendly tool to help you maintain the databases that are available in Farlon Agent Desktop’s tabs: Transfers, Phone Book and Contacts.

Who is this manual for?

This manual is written for Contact Center employees who use Farlon Phone Book Administrator to administrate phone book data in Farlon Agent Desktop.

Conventions Used

Bold	Tabs, function buttons and shortcut keys.
Italic	Program elements, program window names and buttons.
NOTE	Helpful notes and additional information.
a. b. Etc.	List of different procedures that achieve the same outcome.
1. 2. Etc.	List of step-by-step procedures.
◆	List of program elements or features.
>	Menu choices. For example, “choose **Home>New**” means “choose the tab **Home**, and then click on **New** button.”

User Interface

Farlon Phone Book Administration's user interface is very similar to Farlon Agent Desktop's interface.

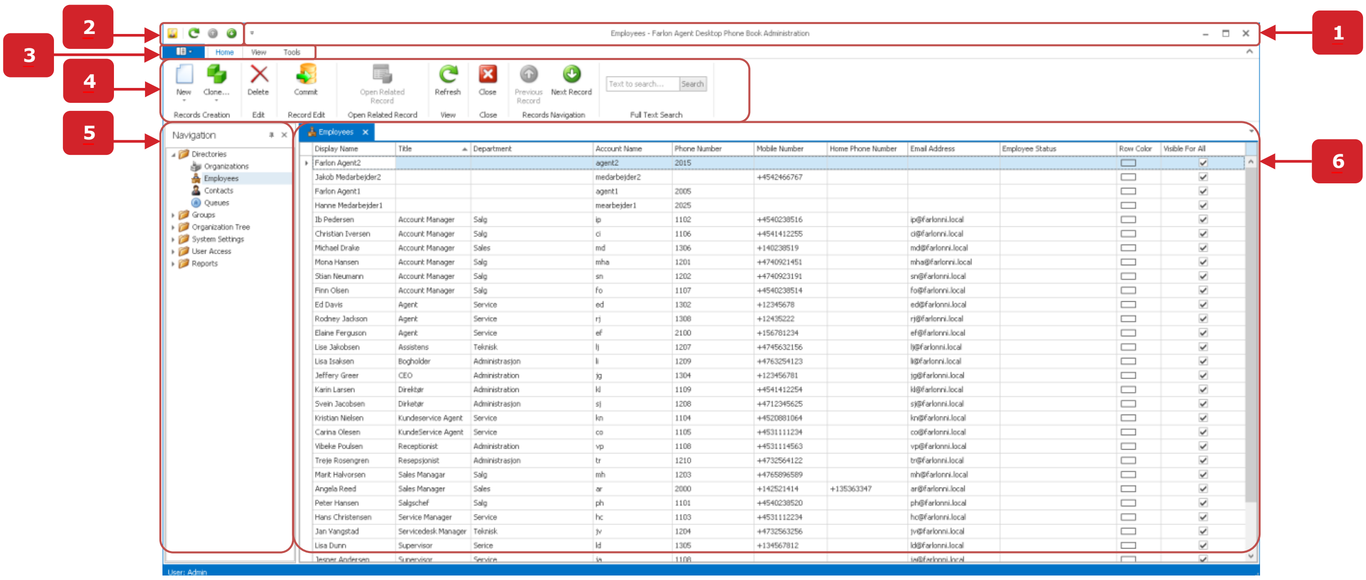


Figure 1. *Farlon Phone Book Administrator user interface*

1 *Title bar* shows the program name and the name of the data list or record window that is currently selected. Use the *title bar* to move the application to another position on your desktop.

2 *Adjustable toolbar.*

3 *Tab menu* contains the following tabs*:*

- 
- **Home**
- **View**
- **Tool**

4 *Function button panel*. Each tab displays a button panel organized into function related buttons groups.

NOTE: Function buttons can vary because they adapt to the actual data list that you are managing at the moment.

5 *Navigation pane* consists of the following folders with data lists:

- Directories*:*
  - *Organizations* – This data list is for both manual and automatic administration of the organization data lists. Organization data is retrieved from your company's Microsoft Active Directory.

NOTE: The Organizations data list will only be available on your installation if your Contact Center has the Farlon Agent Desktop BusinessCenter Option installed.

  - *Employees* – This data list is for both manual and automatic administration of employee data*.* Employee data lists are automatically retrieved from your company's Microsoft Active Directory.
  - *Contacts* – This data list is for both manual and automatic administration of contact data*.* Contacts details are automatically retrieved from your company's Microsoft Active.
- *Queues:*
  - *Queues* - This data list is only for manual administration of the phone queue data, creating and adding subjects to queues and linking queues to an organization.
- *Organization Trees:*
  - *Organization Trees* - This data list is only for manual administration of the Organization trees data. You can structure your company's organization tree/trees and then link the company's employees to their organizational position.
- *System Settings:*
  - *Employee Status* - This data list is for manual administration of employee status. You can create, edit and remove employee status records and also defined the color to indicate each specific status.
- *Reports:*
  - *Reports* – This data list is for generating report templates in which the data from other data lists will be retrieved.

6 *Data area* to display the open data list or record windows, formatted as:

- Separate windows
- Windows or ranged as tabs

Navigation

Manual Operation

It is easy to navigate in Farlon Phone Book Administrator. Simply click on the tab, button or window you wish to select.

Keyboard Operation

You can also enable full keyboard operation of the tab menu and button panel.

1. Press **Alt** or **F10** key.
2. Letters will appear under the tabs and buttons.
3. Now there are two ways to choose a tab or a button

   a. Press a letter key that symbolizes a particular tab or button.

   b. Use **arrow** keys ↓↑ ←→ to navigate between tabs and buttons, and then press **Enter** to select.

Other Navigation Shortcuts

Navigate between tabs:

- **F6** Next tab
- **Shift+F6** Previous tab

Navigate between program windows:

- **Tab** Next program window
- **Shift+Tab** Previous program window

Navigation Pane

The navigation pane consists of different data lists that are divided into folders. This is an independent program element which can be easily moved to another position within the program window:

1. Left click on the *Navigation pane's* heading and drag the Navigation pane to another position.

2. Symbols will appear to indicate where the *Navigation pane* can be placed. Drop the *Navigation pane* on the desired position within the program window.

You also have access to the *Navigation pane's* data lists:

1. Select **Show >Navigation.**
2. Then select the desired data list.

View Settings for Navigation Pane

1. Select **View>Panels .**
2. An option box appears with three view options:
   - Visible
   - Auto hide
   - Hidden
3. Select the desired view mode.

Data Lists

Organizations

The *Organizations* data list allows you to administer information about organizations. Farlon Phone Book Administrator automatically generates the *Organizations* data list from the employee and contacts information retrieved from Microsoft Active Directory.

The Organizations data list will only be available on your installation if your Contact Center has the Farlon Agent Desktop BusinessCenter Option installed.

Create a New Organization

A new organization can be created manually in the *Organization window*.

There are three ways to open a new *Organization window*:

a. If you already have some open windows in the data area:
Select **Home>New > Organization.**

b. From tab

1. Click on the icon in the tab menu.
2. Then select **New>** **Organization.**

c. From the *Navigation pane*

1. Go to the *Navigation pane* or **View>Navigation**.
2. Then select **Directories>** **Organizations.**
3. An organization data list appears in the data area. Next:

    a. Right click within the organization data list window area. An option box appears. Select New.

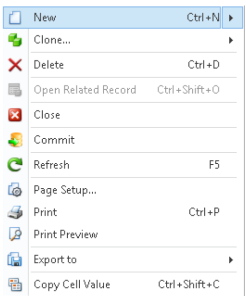


Figure 2. *Options box*

    b. Or use the shortcut **Ctrl +N.**

NOTE: You can skip Point C, steps 1-3, if the organization data list is open in the data area.

1. A new *Organization window* opens in the data area. Enter the relevant information into the empty fields.

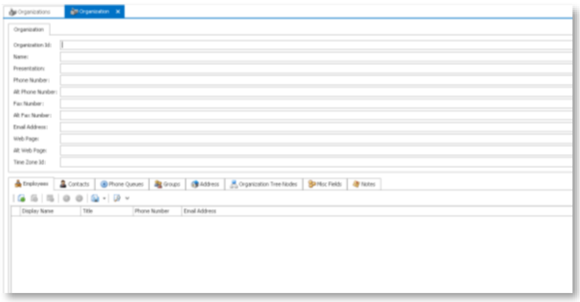


Figure 3. *Organization window*

2. Save the newly established organization:

   a. Select **Save** button .

   b. Or use the shortcut **Ctrl+S**.

3. If you wish to save the newly established organization and then close the *Organization window:*

   a. Select **Save and Close** button .

4. If you wish to save the newly established organization and then create a new organization:

   a. Select **Save and Create** button .

   b. A new *Organization window* appears in the data area.

NOTE: If you wish to save the newly established organization and then create another record type then click on the arrow below the **Save and Create**.

Organization Window

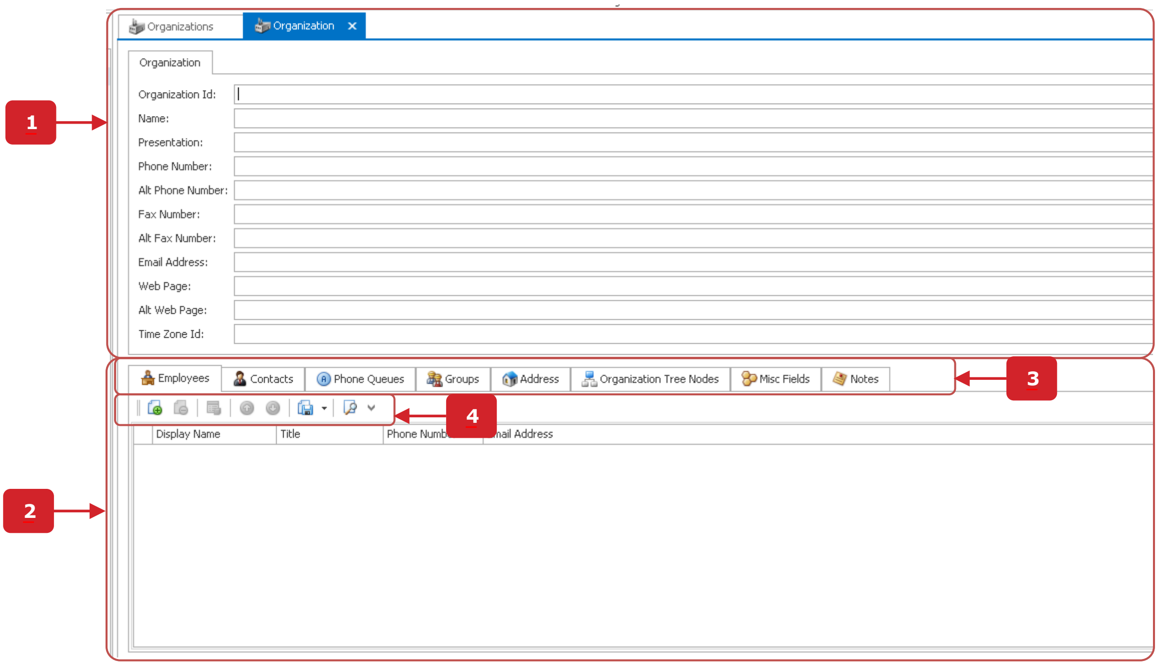


Figure 3. *Organization window*

1 The upper section of the *Organization window* contains the essential information about the organization.

2 The bottom section of the *Organization window* contains additional information about the organization. Here you can link employees, contacts, phone queues and child organization trees to the organization.

3 *Tab menu* groups tabs by data fields containing additional information about the organization. Some tabs contain data lists with employees, contacts, phone queues and child organization trees information. The *Tabs menu* can be customized.

4 *The Toolbar* is for handling the data lists with linked employees, contacts, phone queues and child organization trees. The *Toolbar* can be customized.

Edit an Organization

All changes to an organization's data can be made in the *Organization window*, see Figure 3. All the information fields are editable.

If there is more than one organization in the Organizations data list then double click on the organization you wish to edit.

Link Records to an Organization

It is possible to link the following records to an organization via the *Organization window:* employees, contacts, phone queues and child organization trees.

1. Choose the tab that contains a data record type that you want to link to the organization, see Figure 3, point 3.

2. Select **Link** in the *Toolbar*, see Figure 3, point 4.

3. A new window opens with a data list containing the chosen record type. Select the record to link to the organization. If you wish to select more than one record then hold **Ctrl** button down and select all the records you wish to link to the organization.

4. Click *Ok* to link the selected record or *New* to create a new record.

Employees

The *Employees* data list lets you administer the employee data. This information is searchable in the **Phone Book** tab in Farlon Agent Desktop application. Employee data is synchronized to Farlon Phone Book Administration from the Microsoft Active Directory.

There are two types of information fields in the *Employee record* window:

- Highlighted information fields are locked and uneditable. These fields have been imported directly from the Microsoft Active Directory.
- The white information fields are editable for manual administration.

Create a New Employee

Normally, employee data lists are being synchronized to Farlon Phone Book from your company's Microsoft Active Directory. This data is locked.

A new employee record can be created manually in the *Employee window*.

There are three ways to open a new *Employee window*:

a. If you already have open windows in the data area: choose **Home> New > Employee.**

b. From the tab

   5. Click on the icon
   6. Then choose **New> Employee.**

c. From Navigation Pane:

   1. Go to Navigation Pane or **View>Navigation**.
   2. Then select **Directories> Employees.**
   3. The employee data list window appears in the data area. Next:

      a. Right click within the Employee data list window area. An options box appears. Choose *New.* See Figure 2.

      b. Or use the shortcut **Ctrl+N.**

NOTE: You can skip Procedure C, points 1-3, if the Employees data list is open in the data area.

1. New *Employee window* appears in the data area. Enter the relevant information into the empty fields.

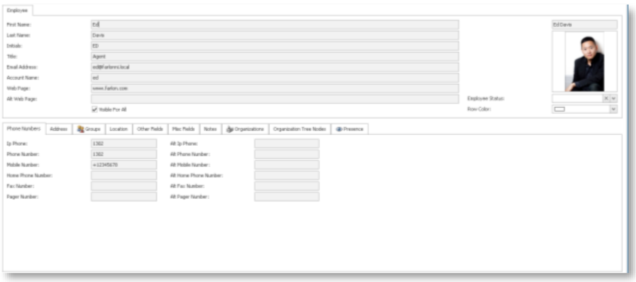


Figure 3. *Employee window*

2. Save the newly established employee record:

   a. Select **Save** button .

   b. Or use the shortcut **Ctrl+S**.

3. To save the newly established employee record and then close the *Employee window:*

   a. Select **Save and Close** button.

4. To save the newly established employee record and then create a new employee record:

   a. Select **Save and Create** button.

   b. New *Employee window* appears in the data area.

NOTE: If you wish to save the newly established employee and then create another record type then click on the arrow under the **Save and Create**.

Edit an Employee

All changes to an employee record can be made via the *Employee window*, see Figure 4. Double click on the employee record that you wish to edit.

NOTE: You can only edit white information fields in the *Employee window.*

Link an Employee to an Organization

To link an employee to an organization:

1. Open the employee record that you wish to link to an organization.

2. Choose the **Organizations** tab, see Figure 4, point 7.

3. Choose **Link** . A new *Organization window* appears. Select an organization then click *Ok*, or click *New* to create a new organization.

Employee Window

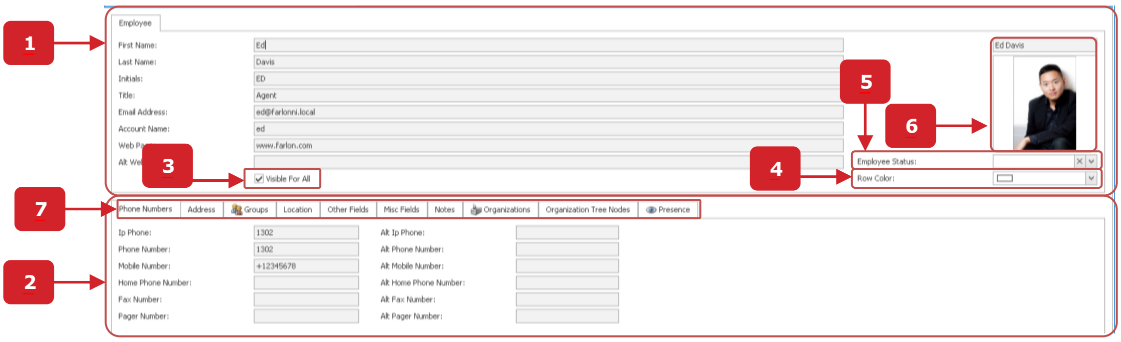


Figure 4. *Employee window*

1 The upper section of the *Employee window* contains the essential employee information.

2 The bottom section of the *Employee window* contains additional information regarding the employee.

3 *Visible For All* check box makes the employee record visible to all Farlon Agent Desktop agents and attendants. Remove the check mark to make the employee visible to attendants only.

4 *Row Color* defines the color for the employee’s information fields in the Farlon Agent Desktop **Phone Book** tab's data area.

5 *Employee Status* lets you select a status for an employee.

6 *Picture field* allows you to upload an employee’s picture.

7 *Tabs* allows you to store and maintain additional information about an employee. Some tabs contain data lists with organizations, organization trees and nodes for linking to an employee. The *Tabs* menu can be customized.

Contacts

The *Contacts* data list lets you administer the contacts database. You can search for contacts information in the Farlon Agent Desktop **Contacts** tab.

Contacts data is synchronized to the Farlon Phone Book Administration from your Microsoft Active Directory.

There are two types of information fields in the *Contact Record* window:

- Highlighted information fields which are locked and uneditable. These have been imported directly from the Microsoft Active Directory.
- White information fields are editable for manual administration.

Create a New Contact

Most of the information in the Contacts data list is imported from the Microsoft Active Directory. However the contacts data list can also be maintained manually.

There are three ways to open a *Contact window* to create a new contact record:

a. If you already have opened windows in the data area:
Select **Home> New > Contact.**

b. From the tab

1. Click on the icon
2. Then choose **New>Contact.**

c. From the Navigation Pane:

1. Go to the Navigation Pane or **View>Navigation.**
2. Choose **Directories> Contact.**
3. The Contact data list window appears in the data area:
    a. When you right click within the Contact data list window, the Options box appears. Choose *New.*
    b. Or use the shortcut **Ctrl+N.**

NOTE: You can skip Procedure C, point 1-3 if the Contacts data list is open in the data area.

1. A new *Contact Window* appears in the data area. Enter the contact's information.

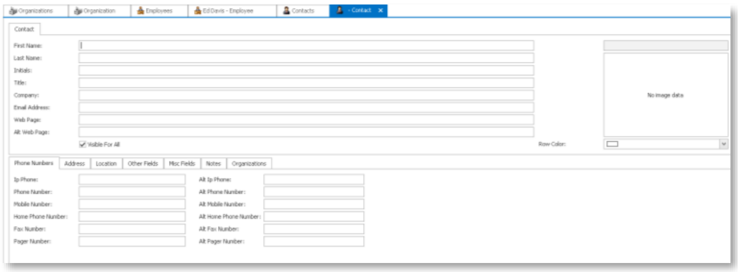


Figure 5. *Contact window*

2. To save the newly established contact record:
   a. Select **Save** button .
   b. Or use the shortcut **Ctrl+S**.
3. If you wish to save the newly established contact record and then close the *Contact window:*
   a. Select **Save and Close** button
4. If you wish to save the newly established contact record and then create a new contact record:
   a. Select **Save and Create** button .
   b. A new *Contact window* appears in the data area.

NOTE: If you wish to save the newly established contact record and then create another record type then click on the arrow under the **Save and Create**.

Edit a Contact

All changes to contact record data can be made via the *Contact window,* see Figure 6. If there is more than one contact record in the data list then double click on the contact record you wish to edit.

NOTE: You can only edit the white information fields in the Contact window.

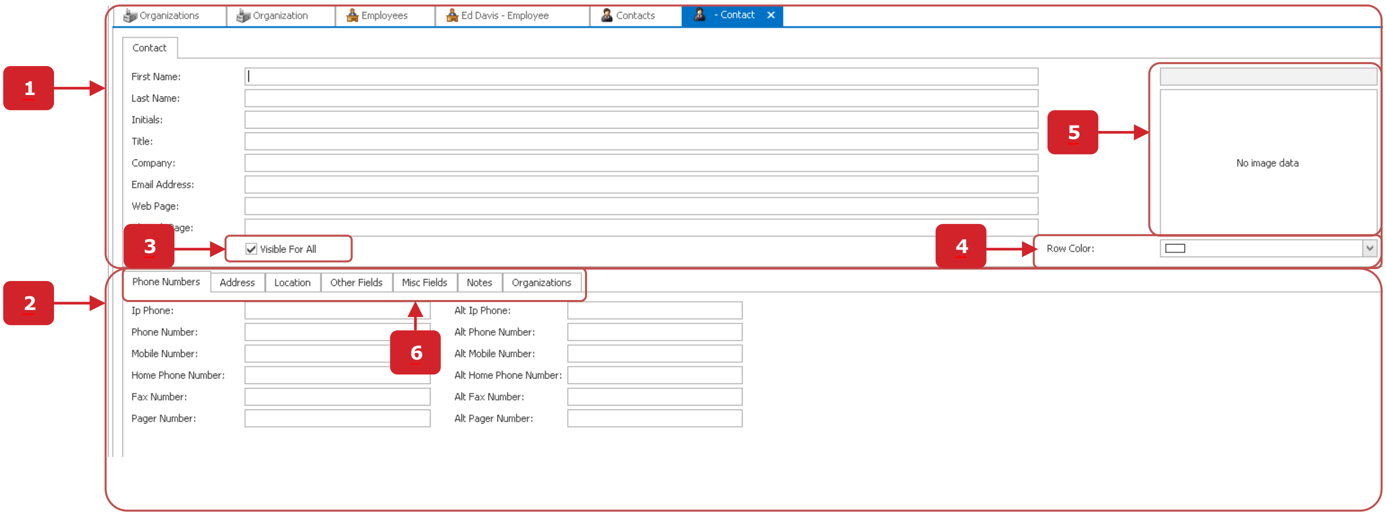
Link Contact to an Organization

Follow these instructions to link an employee to an organization:

1. Open the contact record you wish to link to an organization.
2. Choose the **Organizations** tab, see Figure 6, point 6.
3. Choose the **Link** button in the toolbar. A new *Organization window* appears. Select the desired organization and click *Ok.* The contact will be linked to the selected organization. Or click *New* to create a new organization to which you can link the contact.

Contact Window

The Contact window's interface and functionality is almost identical to the *Employee window.* The main difference is that this window specifies information regarding an external contact.



Figur 6. *Contact window*

1 The upper section of the *Contact window* contains essential contact information.

2 The bottom section of the *Contact window* contains additional information regarding the contact.

3 *Visible For All* check box makes the contact record visible for all Farlon Agent Desktop agents and attendants. Remove the checkmark to make the contact visible to attendants only.

4 *Row Color* defines the color for the contact's information fields in the Farlon Agent Desktop's **Contacts** tab's data area.

5 *Picture field* allows you to upload a contact's picture.

6 *Tabs* allows you store and maintain additional information about a Contact. The **Organizations** tab contains data lists with organizations that can be linked to the contact.

Queues

The *Queues* data list allows you to administer the phone queue list. You can search for phone queues in Farlon Agent Desktop's **Transfers** tab. Queues are created and maintained manually.

Each phone queue can have one or more subjects describing the queue's characteristics, such as language, job function etc. Subjects make it easier for attendants to find the right phone queue when transferring a call. You can also link a queue to an organization.

Create a New Phone Queue

There are three ways to open a *Phone Queue window* to create a new phone queue record:

a. If you already have open windows in the data area:
   Choose **Home> New > Queue.**

b. From the tab

   1. Click on the icon
   2. Then choose **New> Queue.**

c. From *Navigation Pane*:

   1. Go to the *Navigation Pane* or **View>Navigation.**
   2. Then select **Queues> Queue.**
   3. *Queues* data list window appears in the data area:
      a. Right click within the *Queue* data list window area. The Options box appears. Select *New.*
      b. Or use the shortcut **Ctrl+N.**

NOTE: You can skip Procedure C, point 1-3 if the data list phone queue is open in the data area.

1. A new *Phone Queue window* appears in the data area. Enter the phone queue's information.

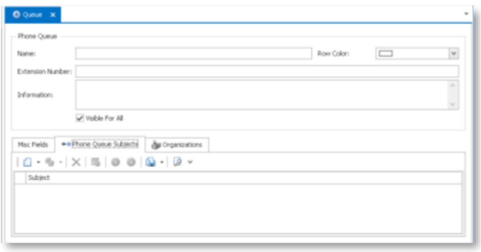


Figure 7. *Phone queue window*

1. Save the newly established phone queue record :

    c. Select **Save** button .

    d. Or use the shortcut **Ctrl+S**.

2. If you wish to save the newly established phone queue record and then close the *Phone queue window:*

    b. Select **Save and Close** button.

3. If you wish to save the newly established phone queue record and then create a new phone queue record:

    c. Select **Save and Create** button .

    d. A new *Phone queue window* appears in the data area.

NOTE: If you wish to save the newly established phone queue and then create another record type then click on the arrow under the **Save and Create** .

Edit a Phone Queue

All changes to a phone queue record data can be made via *Phone queue window,* see Figure 8. Double click on the contact record you wish to edit.

Link a Phone Queue to an Organization

To link a phone queue to an organization:

1. Open the phone queue record to link to an organization.
2. Choose the **Organizations** tab, see Figure 8, point 4.
3. Choose **Link** . A new *Phone queue window* appears. Select the desired organization then click *Ok,* or click *New* to create a new organization.

Phone Queue Window

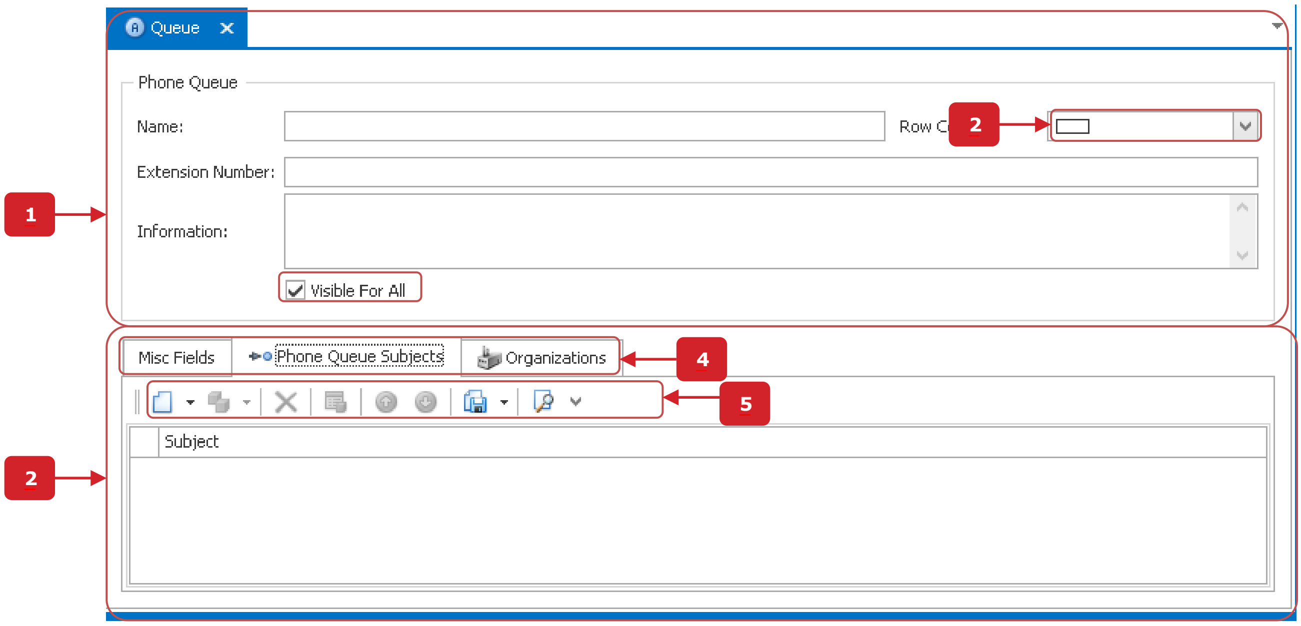


Figure 8. *Phone Queue window*

1 The upper section of the *Phone Queue window* contains essential information regarding the phone queue.

2 The bottom section of the *Phone Queue window* allows you to create subjects and link phone queues to organizations.

3 *Row Color* defines the color for the phone queue's information fields in the Farlon Agent Desktop’s **Transfer** tab's data area.

4 *Tab menu* allows you to create subjects and link phone queues to an organization.

5 *Toolbar* can be customized. It contains buttons for handling the tab related functions.

Organization Tree

The *Organization Tree's* data list allows you to administer organization tree data. This information is used to find the right employee in the Farlon Agent Desktop's **Phone Book** tab. The Organization Tree specifies the employee's hierarchal position.

The Organization Tree ensures that Farlon Agent Desktop's users can quickly and easily find employees based on their hierarchical position in the organization.

Organization trees are manually created and maintained.

Create an Organization Tree Node

There are three ways to open an *Organization tree window* to create a new organization tree record:

a. If you already have open windows in the data area:
   Choose **Home>New > Organization Tree Nodes.**

b. From the tab

   1. Click on the icon

   2. Then choose **New> Organization Tree Nodes.**

c. From Navigation Pane

   1. Go to the Navigation Pane or **View>Navigation.**

   2. Select **Organization Tree> Organization Tree Nodes.**

   3. Organization tree data list window appears in the data area:

      a. Right click within the organization tree data list window area. The options box appears. Choose *New.*

      b. Or use the shortcut **Ctrl+N.**

NOTE: You can skip Procedure C, point 1-3 if the Organization Tree data list is open in the data area.

Organization Tree Window

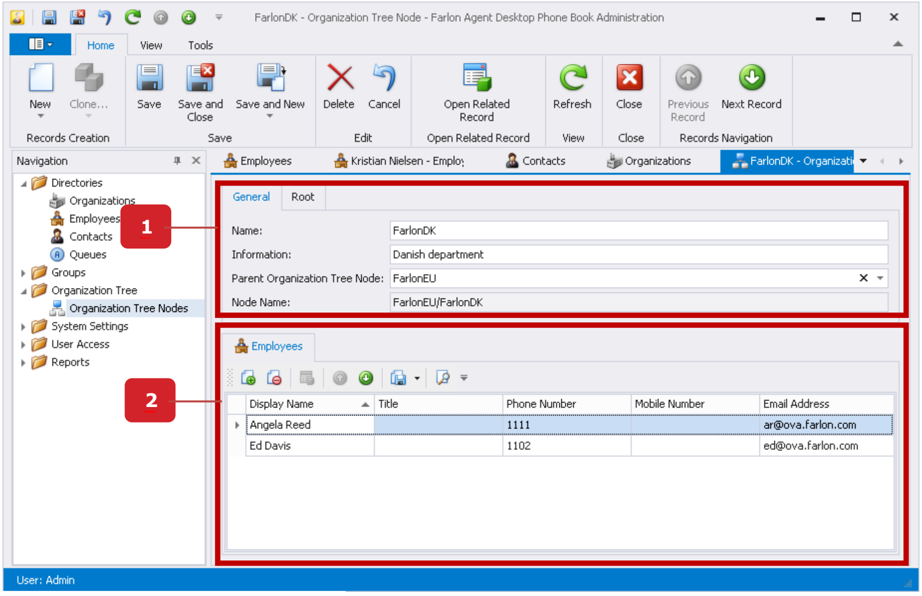


Figure 9. *Organization Tree window*

1 The upper picture in **Organization Tree Node** contains fields, where name, parent node, information will be specified by the user. In **Root**, you choose which **Organization** the Tree Node belongs to.

2 This is where employees are linked and unlinked to an **Organization Tree Node**.

Create Structure for Organization Tree Nodes

The *Organization Tree window* allows you to define sublevels in an organization tree. A child organization tree can have one or several nodes representing different departments on the same organizational level. The main purpose is to create an overview of a company's structure using child organization trees and nodes and then link employees to them.

The following instructions describe how to create Child Organization Nodes:

1. Click on **Organization Tree > Organization Tree Nodes**.

2. Double-click on the Tree Node you wish to subordinate under another.

3. Click on Parent Organization Tree Node and select the Tree Node, you wish your Tree Node to be under.

4. Save your Tree Node. The parent connection should be established.

Link an Employee to an Organization Tree Node

When the organizational structure is complete, you can link employees to their position in the organization.

1. Double-click on the **Organization Tree Node**, you want to distribute employees to.
2. Then choose **Link** .
3. A new window appears containing the employee list linked to the selected organization.
4. Highlight an employee and click *Ok*. The selected employee will be linked to the selected organization tree node.
   Click *New* to create a new employee record.

Alternative Keywords

Create alternative keywords

1. Go to the Navigation Pane.
2. Go to **System Settings** > **Alternative Keyword.**
3. Organization tree data list window appears in the data area:
   a. Right click within the organization tree data list window area. The options box appears. Choose New.
   b. Or use the shortcut Ctrl+N.
4. Type in the alternative keyword in the ”Keywords”-field. The words must be separated with comma. E.g: “johnson,jonsen,jonnsan”.
5. Type in a description – this is optional.
6. Save your keyword.

Employee Status

Employee status is created manually. This is used to inform Farlon Agent Desktop users about an employee's actual status.

Employee Status Window

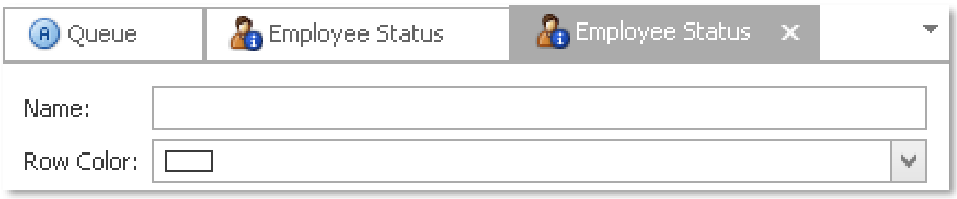


Figure 10. *Employee status window*

Enter text that indicates an employee's status (such as Stopped, Manager etc.) in the *Name* field and then choose a color to indicate this status in *Row Color*.

These employee statuses will be available in the *Employee Window* and will be visible in Farlon Agent Desktop’s **Phone Book** tab.

Users

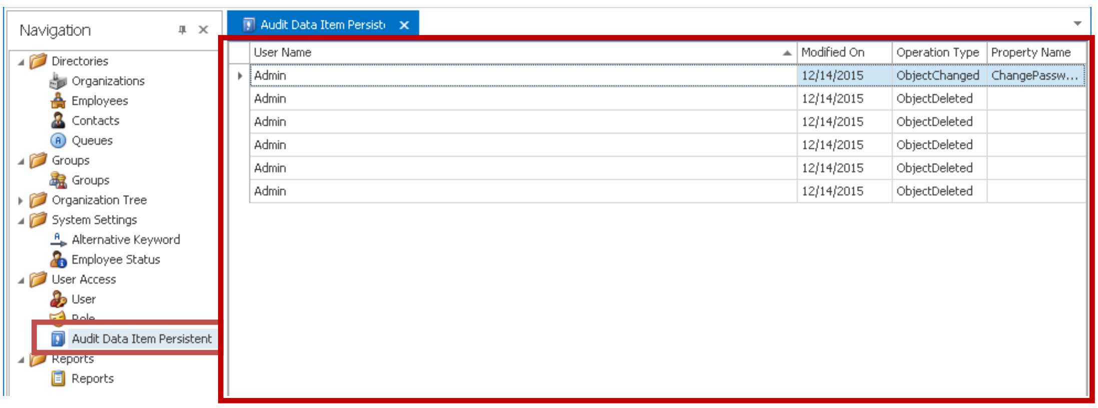
Everything related to user access and permissions is administered through User in User Access. Users for the Farlon Phonebook Admin is created and configured here. This enables the Phonebook Admin to be used by multiple users with different levels of access limitation.

Create new user

7. Go to the Navigation Pane.
8. Select **User Access** > **User.**
9. Organization tree data list window appears in the data area:
   a. Right click within the organization tree data list window area. The options box appears. Choose New.
   b. Or use the shortcut Ctrl+N.
10. Type in user name.
11. Tick ”Change Password On First Logon”, if the user is supposed to change their password when they first log in.
12. Click on Link and select the roles you want to link with the user. A user with multiple roles linked will get their permissions from all linked sources.
13. Save the user.

Logged Changes

Logged Changes contains a log of changes in the Farlon Phonebook Admin. Users with the permission to view Logged Changes, will be able to see user name, date of change, operation type, property name and the value before and after the change. To view more information, use the Column Chooser.



Figur 11. *Logged Changes*

Reports

This data list allows you to generate report templates to retrieve selected information.

Create a New Report

Create a new report manually using the *Report Wizard*.

There are three ways to open the *Report Wizard*:

a. If you already have open windows in the data area: choose **Home>New > Report.**

b. From the tab

  1. Click on the icon
  2. Then choose **New> Report.**

c. From Navigation Pane:

  1. Go to Navigation Pane or **View>Navigation.**
  2. Select **Directories> Report.**
  3. Report data list window appears in the data area. Next:
     a. Right click within the Report data list window area. An options box appears. Choose *New.* See Figure 2.
     b. Or use the shortcut **Ctrl+N.**

NOTE: You can skip Procedure C, point 1-3, if the Reports data list is open in the data area.

1. The Report Wizard window appears.

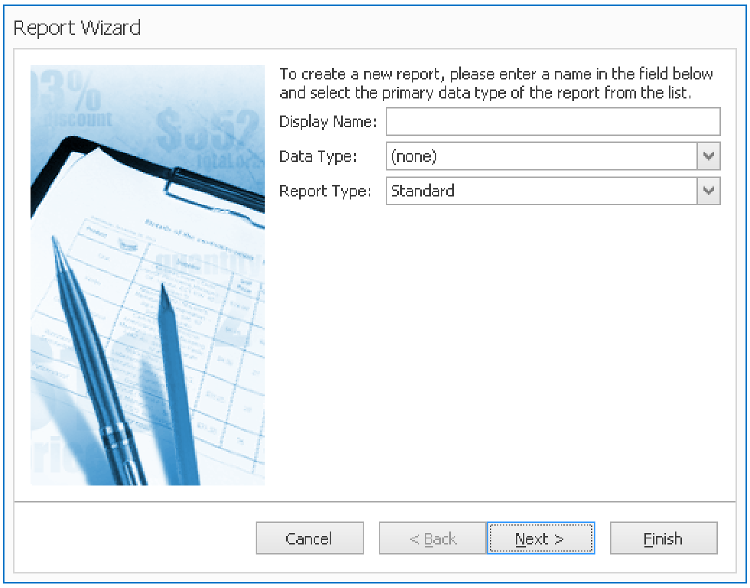
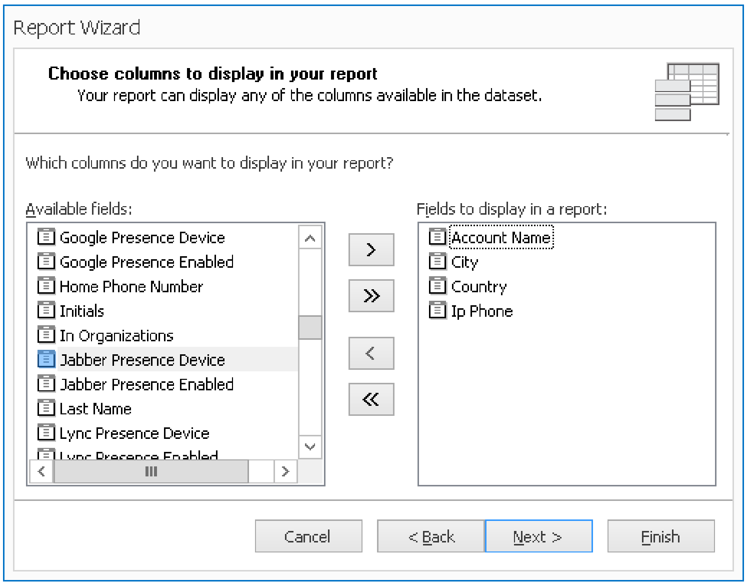


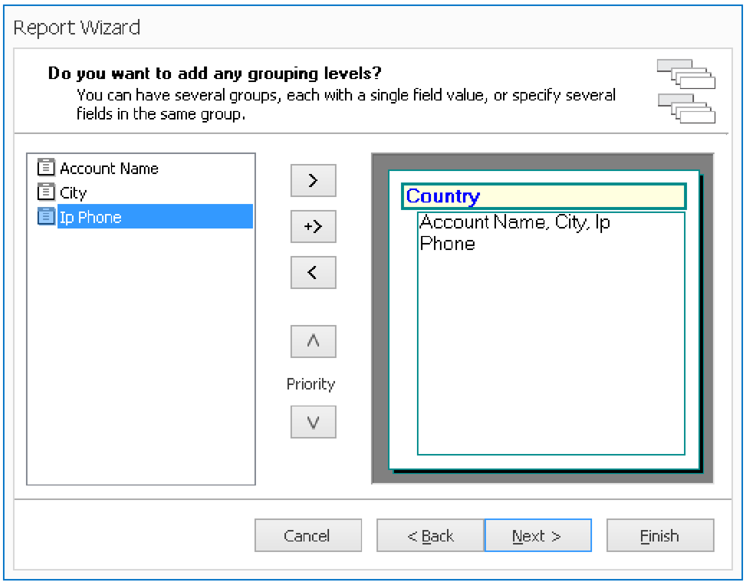
Figure 11. Report Wizard window

2. Enter the report name in the *Report Name* field and then select a data list to use in this report with the Data Type field. You must also select the report type. Click *Next.*

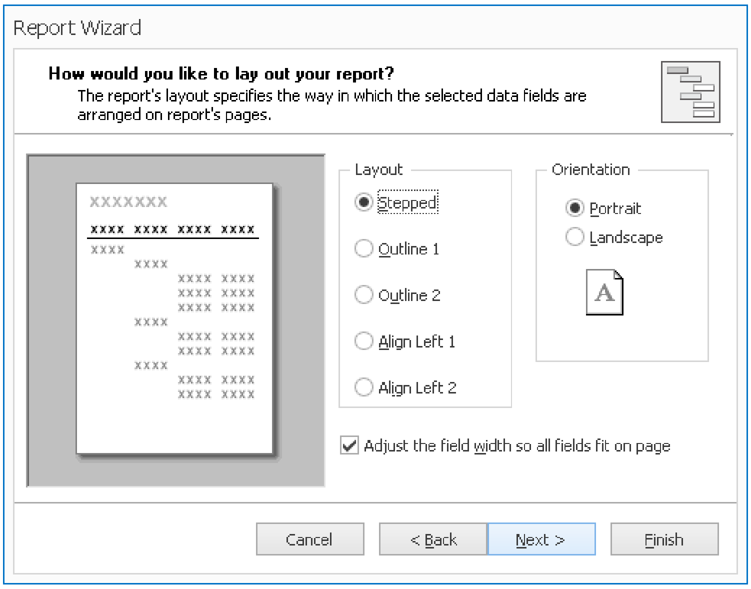
3. Choose the columns you wish to display in your report from the selected data list. Click > to add the columns to the report. Click *Next* when you are finished.



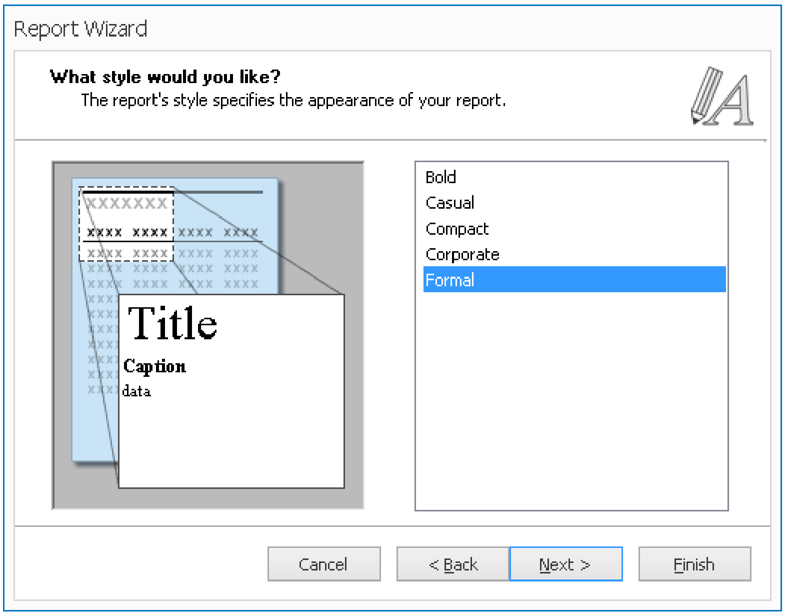
4. Add grouping levels to the selected data. Click *Next.*



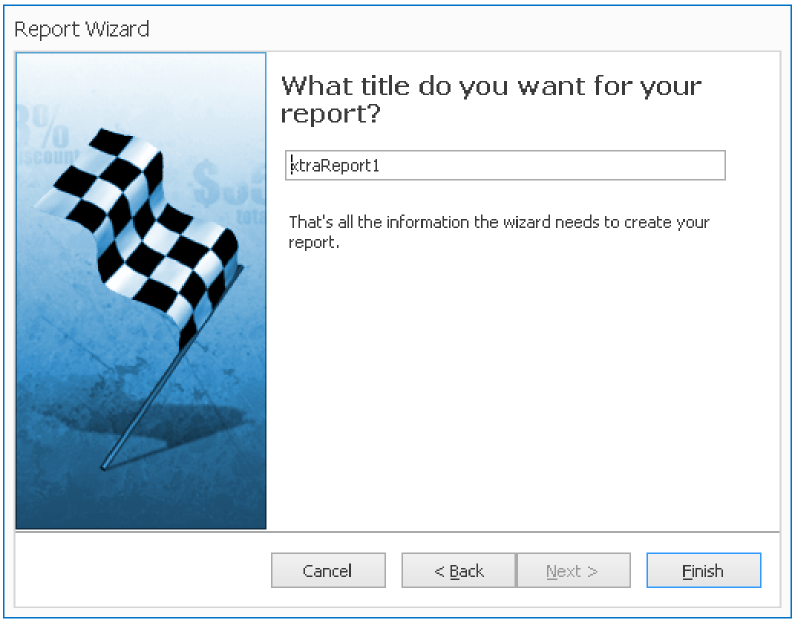
5. Select layout options for your report. Click *Next.*



6. Select a style in the right box of the *Report Wizard window*. Click *Next.*



7. Finally, enter a title for your report and click *Finish.*



8. Report Designer appears. Instructions about this part of the Phone Book Administrator are not included in this User Manual.

Function Buttons

NOTE: Function buttons change depending on the selected data list or record window in the data area.

Home		
New	Ctrl + N	Open a new record window. *NOTE*: You can select a record type by clicking on the arrow below this button. Select a record type in the Options box.
Clone...	Clone a highlighted record in the data list.	
Save	Ctrl + S	Save changes.
Save and Close	Ctrl + Enter	Save changes and close the record window.
Save and New	Save changes and open a new record window. *NOTE*: To select a different record type click on an arrow bellow the button. Select a new record type in the Options box.	

Delete	Ctrl + D	Delete the selected record.
Commit	Commit selected record/records to the live system.	
Update	F5	Update data lists.
Close	Close selected data list or record.	
Previous Record	Ctrl + Page Up	Go to previous record.
Next Record	Ctrl + Page Down	Go to next record.
Open record	Open selected record.	
Undo	Undo changes.	

View	
Navigation	Open the Navigation Pane's content.
Skin	Change the visual appearance of the program. Click on a skin to select it.
Window List	Open an option box to specify how you would like to organize the opened windows in the data area.
Panels	Open an option box to specify the view mode for the Navigation Pane: • Visible • Auto hide • Hidden

Tools		
Edit model	Ctrl + F1 Shift	Advanced program settings.

There are also other function buttons in the record window's toolbar.

Toolbar	
Link	Link a selected record to a data list or an element in a data list.
Unlink	Remove a link between a record and a data list or an element in the data list.

Export Data Content

You can export data content to several different file formats:

1. Go to the data content you wish to export.
2. Right click on the data area.
3. Options box appears. Right click on *Export to.*

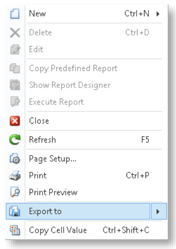
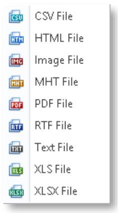


Figure 4. Options box



4. Choose the desired file format.