MMDIAL · ADDITIONAL FEATURE

Supplement – Workstations

Managing agents and workstations separately – a feature being retired

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Contents

1. About this manual
2. Why it exists – and why it is going away
   2.1 Why that no longer fits today
   2.2 What comes instead
3. What changes as a result
4. Creating workstations
   4.1 Creating a workstation
   4.2 Editing or deleting a workstation
5. Assigning agents
   5.1 How to assign
   5.2 Removing an assignment
   5.3 Several agents at one desk
6. Setting up the devices
7. In day-to-day operation
   7.1 What the agent sees
   7.2 Locking a workstation
   7.3 Who sat where?
8. Appendix
   8.1 Adding or replacing a desk
   8.2 Common pitfalls
   8.3 Further documents

1. About this manual

DEPRECATED – BEING RETIRED

This feature is deprecated and is being retired. It comes from a time when devices were permanently attached to desks, and it no longer matches the way people work today – home working, changing desks, softphones on devices people bring with them.

This manual is therefore aimed **exclusively at existing customers** for whom the feature is still active. It describes how it works so that day-to-day operation remains comprehensible.

It is no longer used for new setups. If you are thinking of switching to it: do not, but talk to us instead. For most of the concerns that used to lead to this feature, there are better routes today.

We deliberately do not name a switch-off date here – we will inform affected customers in good time and directly.

Normally, telephony in mmDial belongs to the **agent**: whoever signs in brings their voice connection with them and can work from any computer.

There are cases, however, where the telephony is meant to belong to the **workstation** rather than to the person. Agents then still sign in with their own login, but make calls through the desk they are sitting at. That is what this manual is about.

This manual is deliberately a short booklet of its own: the feature changes something fundamental about the setup, but it now affects only a few customers. Anyone who does not use it does not have to deal with it.

NOT VISIBLE IN EVERY ACCOUNT

If you cannot find the menu entry for workstation management, the feature is not active for you – then the normal setup applies, in which the telephony is tied to the agent. That is the normal case and the state we are working towards.

2. Why it exists – and why it is going away

The feature came about for call centres in which every telephone stood permanently on one desk. It was meant to solve four things:

- **Fixed binding to a desk**, because some clients specified that calls could be made only from particular, named workstations
- **Shift working** at the same computers, without setting the telephony up afresh each time
- **Central setup** of the devices once per desk instead of once per member of staff
- **Traceability** of which desk a call was made from

2.1 Why that no longer fits today

The assumption behind it – one person, one desk, one telephone – holds in very few businesses now. Home working, changing desks and softphones on different devices all run counter to tying people to a desk. At the same time, ongoing maintenance work arises: every move within the room has to be followed up in the assignment table, and anyone who forgets has an agent the next morning who can sign in but cannot make calls.

That is why the feature is being retired.

2.2 What comes instead

For the concerns that used to lead here, there are other routes today – through permissions, groups and the reporting, for instance. What is right in your case depends on why you needed the desk binding in the first place. Talk to us before rebuilding anything yourself.

3. What changes as a result

	Normal setup	Separate management
The voice connection belongs to	the agent	the workstation
Setting up the device	per agent	per workstation
The agent can work	from any computer	only from an assigned desk
Additional maintenance	none	the assignment table
Menu entry for workstation management	not present	present

The **agent's sign-in stays the same.** They still sign in with their own login, see the same interface and work in exactly the same way. The difference lies in what the call is set up through.

> **CAUTION**
>
> If an agent is **not assigned to a workstation**, they can sign in but cannot make calls. In that case they are shown a clear message. So plan the assignment before anybody starts their shift.

4. Creating workstations

You will find workstation management in the **agent management** area.

4.1 Creating a workstation

1. Open workstation management
2. Choose **Create PC**
3. Assign a **number** – it identifies the desk
4. Assign a **password**
5. Save

The number and password are the login details with which the softphone or desk phone at this desk signs in to our system.

> **TIP**
>
> Assign numbers that match the layout of your rooms – for example `101` to `112` for the first room and `201` upwards for the second. That saves searching when something is stuck at desk 7.

4.2 Editing or deleting a workstation

Through the list of workstations you edit an existing entry or remove it. The **Connected with** column shows you which device is currently signed in at this desk – useful for checking whether a telephone can be reached at all.

> **CAUTION**
>
> Do not delete a workstation that somebody is sitting at. The call will be cut off. Check the live view first.

5. Assigning agents

The assignment itself happens in the **assignment table**.

5.1 How to assign

1. Open workstation management
2. Use **Show agents** to display the list of agents
3. Drag the **agent you want** from the list into a free field **to the right of the workstation**

The assignment takes effect immediately.

5.2 Removing an assignment

Click the **X** on the connection in question. The agent is then no longer assigned to any desk and can no longer make calls from there.

5.3 Several agents at one desk

You can assign several agents to one workstation – which makes sense in shift working, when different people sit at the same computer in the morning and in the afternoon.

> **TIP**
>
> Keep the assignment as simple as possible. A table in which every agent appears at three desks is in the end just as confusing as no assignment at all – and it no longer serves the purpose of tying people to a desk.

6. Setting up the devices

At every workstation a device has to be set up with the login details of the **desk** – not with those of the agent.

For that you need:

- the **number** of the workstation
- the **password** of the workstation
- the server address, which we will give you

That applies equally to a softphone on the computer and to a SIP desk phone.

> **TIP**
> Set one desk up completely and test it before you set up the rest. Whatever has worked once can then be replicated quickly.

7. In day-to-day operation

7.1 What the agent sees

After signing in, the agent is shown **which workstation they are assigned to**. If there is no assignment, a clear warning appears instead – then they cannot make calls.

Tell your team to take this message seriously and report it, instead of trying for half an hour.

7.2 Locking a workstation

Through the live view a workstation can be **locked** and **unlocked** again. That is useful when a desk is not technically in order and should not be occupied for the time being.

> **NOT VISIBLE IN EVERY ACCOUNT**
> Locking from within the live view is available in mmDial Pro.

7.3 Who sat where?

Because calls run through the desk, it is possible to trace afterwards which workstation a call was made from. For clients who require binding to a desk, that is precisely the point.

8. Appendix

8.1 Adding or replacing a desk

New setups are no longer created with this feature. If a desk is added in an existing operation or a computer is swapped out, proceed as follows:

1. **Create the workstation**, with a number and password
2. **Set up the device**, with the login details of the desk
3. **Test the desk** – sign in, make a call, receive a call
4. **Assign agents** through the assignment table
5. **Inform the team** who sits at which desk

> **DEPRECATED – BEING RETIRED**
>
> If you are rebuilding anyway, that is a good moment to discuss leaving this feature behind with us – rather than putting effort into something that is being retired.

8.2 Common pitfalls

Symptom	Usual cause
The agent can sign in but cannot make calls	No assignment to a workstation
No sound in either direction	The device was set up with the agent's login details instead of the desk's
One desk is never reachable	The device is not signed in – the *Connected with* column stays empty
Nothing works after moving desks	The agent is sitting at a desk they are not assigned to
A call is suddenly cut off	The workstation was deleted or locked while somebody was sitting at it
The menu entry is missing altogether	The feature is not active for you – which is the normal case

8.3 Further documents

- *mmDial Pro manual* or *mmDial Basic manual* – the administration as a whole

- *Manual for agents* – the desk your agents work at

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